

Tax Details

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The Tax Details report offers a detailed breakdown of the sites within the specified time period that were taxed on a sale. Using the available filters, this report can be refined to focus on a specific division or tax type.

PARAMETER	VALUE
Period *	Sep 2023
Division	
Tax	

[RUN REPORT](#) [RUN AS EXCEL](#)

Required Permissions

The following permissions are required to run the Tax Details report.

Permission ID	Permission Name
154	Standard AR Report
155	Standard Account Report

Report Parameters and Values

Parameter	Value
Period	Filters to a specific month and year period.
Division	Filters the report to only return results for accounts in the selected Division.
Tax	Filters the report to only show results that belong to the selected Tax group.

Run The Report

1. Select the **Period** the report applies to.
2. Optional filters to apply:
 - **Division**
 - **Tax**
3. Select **Run Report** or **Run as Excel**.
 - *Run Report*: results of the generated report will display in a new window tab.
 - *Run as Excel*: results will be exported to Excel for the user to open and view.

Understand The Report

Tax Details

Period: Sep 2023, Division: HOUSTON

Division #	Division	Site #	Site Name	Tax Region	Tax Exempt	Posting Period	Invoice #	TOTAL SALES	TAXABLE REVENUE	TAXES
1004	HOUSTON	48970001	Starbucks	GALV_COU	0	2023-09	883841	190.46	0.00	0.00
1004	HOUSTON	48970001	Starbucks	STATE_TX	0	2023-09	883841	190.46	59.11	3.70
1004	HOUSTON	48970001	Starbucks	TEXS_CITY	0	2023-09	883841	190.46	59.11	1.18
Total								\$ 571.38	\$ 118.22	\$ 4.88

Column	Description
Division #	Displays the division ID of the divisions included in the report.
Division	Displays the names of the divisions included in the report.
Site #	Displays the site IDs of the sites included in the report.
Site Name	Displays the names of the sites the report includes.
Tax Region	Displays the tax region of the sites included in the report.
Tax Exempt	Indicates if the site is tax exempt. If yes, "1" displays. If no, "0" displays.
Posting Period	Displays the posting period for the site included in the report.
Invoice #	The invoice ID sales and taxes are associated with.
Total Sales	The total sales within that time period for that site.
Taxable Revenue	Displays how much of the Total Sales amount for the site is taxable.
Taxes	Displays the total tax amount collected from the Total Sales figure.