

Tax Summary

Last Modified on 09/14/2023 5:12 pm EDT

Pathway: [Reports](#) > [Standard Reports](#) > [AR](#) > [Tax Summary](#)

The Tax Summary report offers a concise overview of a division's sales taxes assessed within the chosen time frame.

TAX SUMMARY		REPORTS > STANDARD REPORTS > AR	
PARAMETER	VALUE	RUN REPORT	RUN AS EXCEL
Period *	Sep 2023		
Division			
Tax			

Required Permissions

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 return results related 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



Not all sales are taxable. If a service code or charge code's setup indicates it is not taxable, any associated charges will not be factored into the Taxable Sales total. This also applies for sites marked 'Tax Exempt.'

Tax Summary

Page 1 of 1

Period: Sep 2023, Division: HOUSTON

DIVISION	TAX NAME	TOTAL SALES	TAXABLE SALES	TAXES
HOUSTON	GALVESTON COUNTY	87.05	0.00	0.00
HOUSTON	TEXAS CITY	87.05	59.11	1.18
HOUSTON	TEXAS STATE	87.05	59.11	3.70
			Total	\$ 4.88

Column	Description
Division	The division taxes apply to.
Tax Name	The name of the tax applied to the sale.
Total Sales	The total sales amount for the division in the selected period.
Taxable Sales	Displays what amount of the Total Sales are taxable.
Taxes	The total amount of taxes collected from the Taxable Sales.