Tax Reporting_®

Pull a report that shows the amount of sales tax charged on your orders. The **All Sales** (Itemized) Report can display that amount in one column.

- 1. Navigate to E-Commerce > Reports and click the All Sales (Itemized) Report
- 2. Enter in the specific date range for the report you wish to run

Pro-Tip! Before clicking on the **Search** button, click on the Columns tab and move the **Tax** field from the list of **Available Fields** to the left side of **Customer Columns**. Do this by selecting the **Tax** field and clicking the double arrows.



3. Click **Search** to view the results, and see tax listed in a column on the report

Pro-Tip! You can export a copy of this information to Excel via a CSV file to better filter the report and to use for your own records. To export, first make sure to click the "Check All" button on the report in Infusionsoft. After all data is selected, click on Actions and select "Export". Choose the fields you want to export to Excel (make sure Tax is selected) and scroll to the bottom to "Process" the export.



Pro-Tip! The total of the tax charged is listed in the Tax Column. If you are charging multiple types of tax ex. City/State/Country, you can use Filters in Excel to sort by locations. Be sure to add the Billing Address columns to your output.