

All Sales Report

Introduction

This report helps you see what and how much you are selling.

The All Sales Report has more robust search criteria, including Tags and Products. You can use it to create a customized sales summary report. This report displays results by invoice. Click on a **Sale** link to view the details for a specific invoice.

All Sales Report					
Actions ▾	New Search	Edit Criteria/Columns...	Save...	Print...	Saved Searches... ▾
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<input type="checkbox"/>	Invoiceid	Name	Balance	Date	Inv total
<input type="checkbox"/>	4757	Infusionsoft Testing	\$35.00	7/2/2019	\$35.00
<input type="checkbox"/>	4763	Infusionsoft Testing	\$35.00	7/4/2019	\$35.00
<input type="checkbox"/>	4755	Infusionsoft Testing	\$35.00	7/1/2019	\$35.00
<input type="checkbox"/>	4761	Infusionsoft Testing	\$35.00	7/3/2019	\$35.00
<input type="checkbox"/>	4767	Infusionsoft Testing	\$35.00	7/5/2019	\$35.00
<input type="checkbox"/>	4753	Infusionsoft Testing	\$35.00	7/1/2019	\$35.00
<input type="checkbox"/>	4759	Infusionsoft Testing	\$35.00	7/3/2019	\$35.00
<input type="checkbox"/>	4765	Infusionsoft Testing	\$35.00	7/5/2019	\$35.00
			\$280.00		\$280.00

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How to find the All Sales Report

1. Go to **E-Commerce > Reports** in the main navigation menu
2. Click on **All Sales Report**

Subscription Revenue Summary	Subscription Plan Retention Summary.
Monthly Sales Totals	Monthly Sales Totals.
Daily Sales Totals	This report shows the total sales grouped by day.
All Sales Report	This report searches all sales (no grouping or totals).
All Sales (Itemized) Report	This is an itemized report for each sale.
Monthly Receivables	This report shows all money that should be collected (g
Daily Receivables	This report shows all money that should be collected (g

Available Criteria

The All Sales Report searches all sales (no grouping or totals) and has a robust search criteria, including:

- Invoice ID
- Inv Total
- Date Range
- Bal Due
- Billing Address
- Tags
- Products

Building your custom sales report

To create a customized sales summary report using the **Balance** and **Inv Total** columns

Search Address Misc Criteria **Columns**

Customize Columns on Search Results

Custom Columns:

- Date ^ v x
- Sale ^ v x
- Invoiceid ^ v x
- Balance ^ v x**
- Inv total ^ v x**

Available Fields:

- Id
- Contactid
- Description
- Name
- Company
- First name
- Last name
- Fullname
- Spouse name
- Phone 1
- Batchemailaddress

This report displays results by invoice. Click on a **Sale** link to view the details for a specific invoice.

Search Address Misc Criteria **Columns**

Customize Columns on Search Results

Custom Columns:

- Date ^ v x
- Sale ^ v x**
- Invoiceid ^ v x
- Balance ^ v x
- Inv total ^ v x

Available Fields:

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- Contactid
- Description
- Name
- Company
- First name
- Last name
- Fullname
- Spouse name
- Phone 1
- Batchemailaddress

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<input type="checkbox"/>	Date	Sale	Invoiceid
<input type="checkbox"/>	7/1/2019	Strawberry Lemonade - Eve	4753
<input type="checkbox"/>	7/1/2019	Strawberry Lemonade - Eve	4755
<input type="checkbox"/>	7/2/2019	Strawberry Lemonade - Eve	4757
<input type="checkbox"/>	7/3/2019	Strawberry Lemonade - Eve	4759

Pro-Tip: If you are running multiple searches make sure to click the “Reset filters” to clear the previous criteria.

Invoice Id

Inv Total equals \$

Date -

Bal Due equals \$

Past Due Invoices

To pull ALL past due invoices, use a greater past year and the Bal Due is greater than 0.01

Search Criteria

Invoice Id

Inv Total equals \$

Date -

Bal Due greater than \$

Pro-Tip! In Infusionsoft, sales totals represent gross sales. In order to see net sales, you will need to export a sales totals report along with the credits issues report. The credits issued report will contain any manual credits you have recorded along with any refunds you have made through Infusionsoft. If you issue a refund or credit outside of Infusionsoft, be sure to record this in Infusionsoft if you are using Infusionsoft for bookkeeping purposes.