Summary

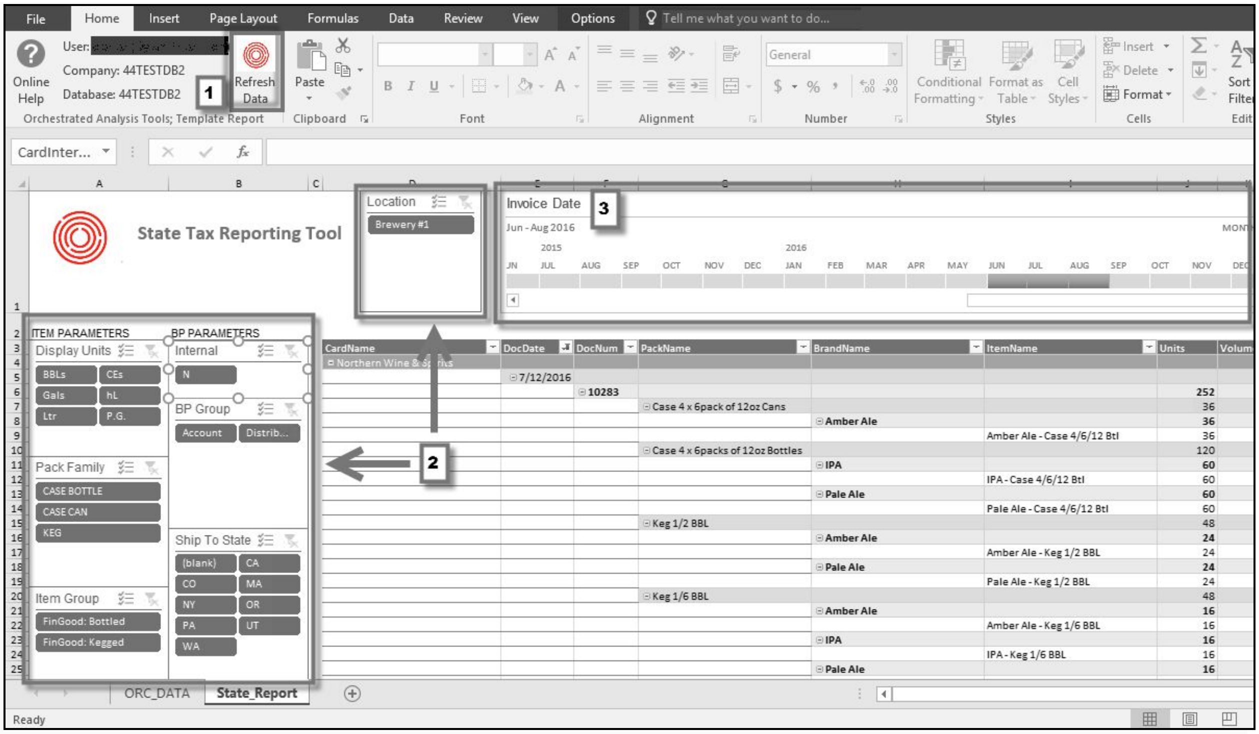
The following article will go over how to use the state tax analysis tool within Orchestrated.

Step by Step Guide

To run the state tax report, do the following:

Step 1 – Open the worksheet in Excel; *Sales>Sales Reports>Sales Excise Tax Tool*

- The Excel workbook opens into the “State_Report” tab and pulls from the A/R invoice data on the “ORC_DATA” tab; You need to click the “Refresh Data” button in the Home ribbon upon opening the tool
- The field slicers at the top and left side of the worksheet available to set the view are:
    - Location
    - Item Parameters – Display Units
    - Item Parameters – Pack Family
    - Item Parameters – Item Group
    - Item Parameters – Brand ABV
    - Item Parameters – Brand Name
    - BP Parameters – Internal
    - BP Parameters – BP Group
    - BP Parameters – Ship to State
- There’s also a timeline slicer at the top to filter the Invoice Date by days, months, quarters or years (defaults to months)



- Once the view is set the report will display the units and volume of sales by customer depending on how the other parameters are set
- You can click the expand or collapse buttons in the columns to show less or more data
- Like any Excel file you have the ability to print a copy of this view by going to File>Print in Excel

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