

## 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)



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- 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

Version 4.5.1.0