

All Sales Report

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Introduction

The All Sales Report helps you see what and how much you are selling with 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

Criteria

Date:


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558 results

<input type="checkbox"/>	Id	Sale	Name	Business state	Promo code	Source	Return	Inv total
<input type="checkbox"/>	9311	Amazing Asset Protection	Jack Smithson	AZ	Unknown	Online	None	\$109.00
<input type="checkbox"/>	9313	Weed Service - Every mont	Ben Sowards	afsdadsad	Unknown	Online	None	\$55.00
<input type="checkbox"/>	9315	Product ABC - Every mont	Jack Smithson	AZ	Unknown	Online	None	\$100.00

To access the All Sales Report:

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

<p>Daily Sales Totals</p> <p>This report shows the total sales grouped by day.</p>
<p>All Sales Report</p> <p>This report searches all sales (no grouping or totals). </p>
<p>All Sales (Itemized) Report</p> <p>This is an itemized report for each sale.</p>

Available Criteria

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

- Invoice ID
- Inv Total
- Amount Paid
- Amount Due
- Bal Due
- Date Range
- Date Interval
- Date Custom Interval

Search Criteria



Invoice Id

Inv Total \$

Amt Paid \$

Amt Due \$

Bal Due \$

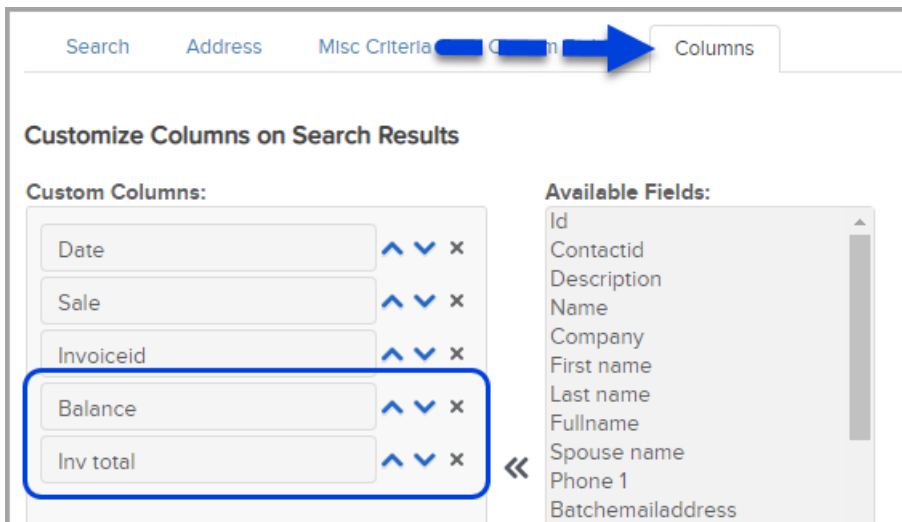
Date  - 

Date Interval

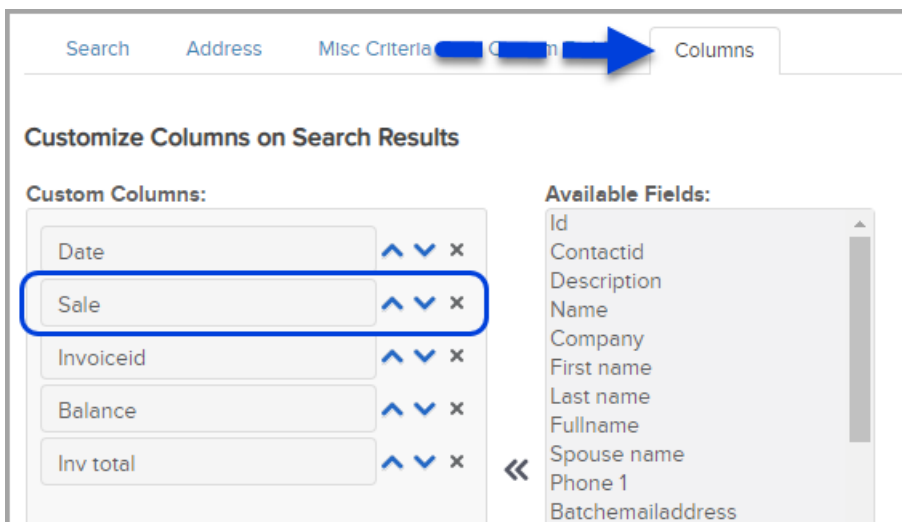
Date Custom Interval days ago and/or days ago.

Building your custom sales report

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



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



558 results

<input type="checkbox"/>	Id	Sale	Name	Business state	Pr
<input type="checkbox"/>	9311	Amazing Asset Protection	Jack Smithson	AZ	U
<input type="checkbox"/>	9313	Weed Service - Every mont	Ben Sowards	afsd fsad	U
<input type="checkbox"/>	9315	Product ABC - Every mont	Jack Smithson	AZ	U

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

Amt Due	equals	100	\$
Bal Due	equals	0.00	\$
Date			
Date Interval	Last 90 Days		
Date Custom Interval		days ago and/or	
<input type="button" value="Search"/> <input type="button" value="Reset Filters"/>			

Past Due Invoices

To pull ALL past due invoices, enter date in the past and the Bal Due is greater than 0.01

Amt Due	equals	0.00	\$
Bal Due	greater than	0.01	\$
Date	06-01-2018	-	09-10-2020
Date Interval	Please select one		
Date Custom Interval		days ago and/or	
<input type="button" value="Search"/> <input type="button" value="Reset Filters"/>			

Pro-Tip! In Keap, 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 Keap. If you issue a refund or credit outside of Keap, be sure to record this in Keap if you are using Keap for bookkeeping purposes.

FAQ

What's the difference between Bal Due and Amt Due?

Amount Due is what's currently due on the order, not taking into consideration future payments in a payment plan that are not yet due. Amt Due does not take into consideration whether or not payments have already been paid, but calculates all payments that are either due today, or due previously. For example, if today's date is 6/20, and an order has \$100 total due and 4 payments of \$25 each due on the dates, 4/15, 5/15, 6/15 and 7/15. Amt Due

would be considered \$75 because 7/15 isn't due yet. If all payments had been collected, Amt Due would still show as \$75, so whether or not payment has been made doesn't effect this filter.

Balance Due filters for how much is currently owed, taking into consideration all payments that have already been made, and which payments are currently due. So in the above example, if the contact had only made the payment on 4/15, and missed 5/15 and 6/15, their Bal Due would be \$50 for those two past due payments, but not \$75 since the 7/15 payment isn't due yet.
