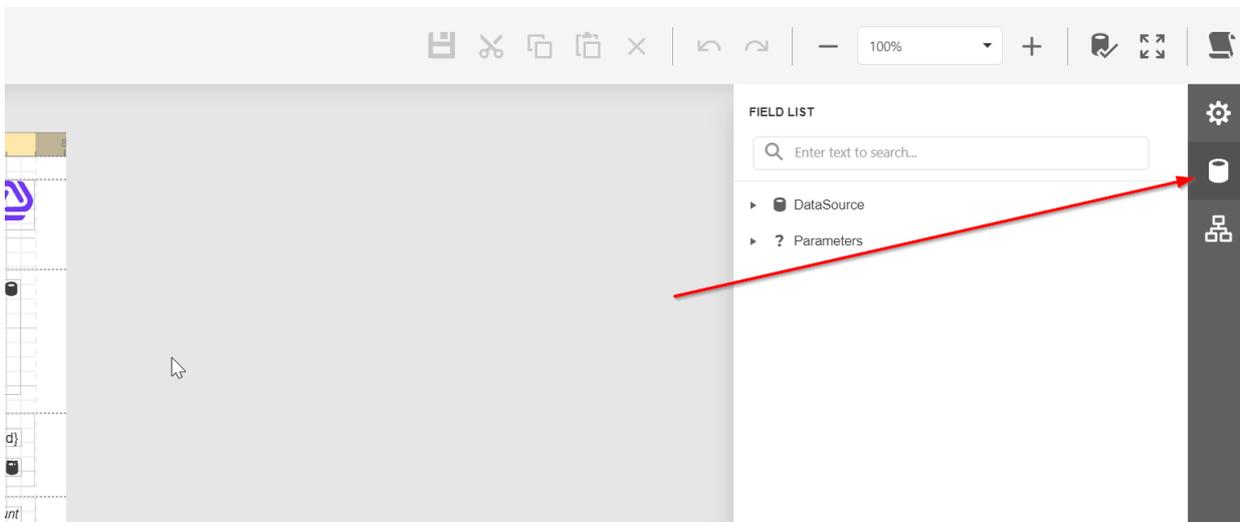


How do I add tax to a Pro Forma Invoice?

Last Modified on 10/23/2024 4:47 am EDT

The Pro Forma invoice in EventsAir does not come with tax by default. However, you can create our own copy of the Pro Forma invoice that includes it. The steps are outlined below.

1. Navigate to the **Reporting** panel.
2. On the left hand side, locate and select the **Financial Reports** section.
3. Scroll down until you see a report titled **Pro Forma Invoice**.
4. Select invoice and then choose **Edit** at the bottom right.
5. When prompted to copy the report, select **Yes**.
6. Click the newly created report and choose **Edit**.
7. This will bring up the **report editor**.
8. Locate and click **Fields** icon on the right hand side of this screen.



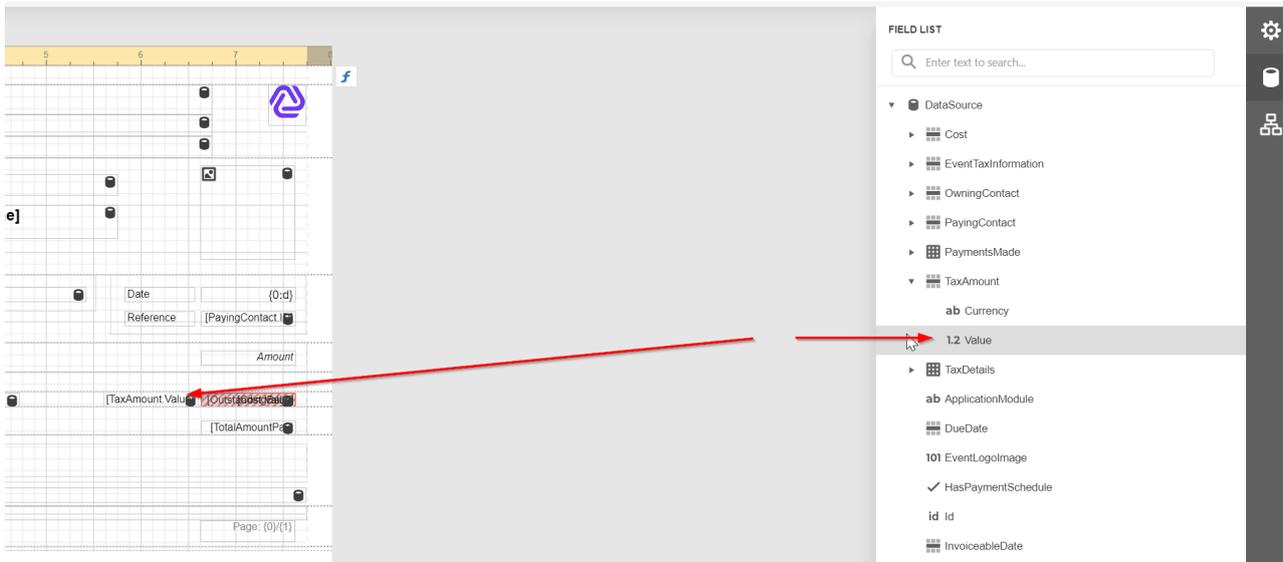
9. Click the arrows next to **DataSource** and **TaxAmount** to expand the selection.

FIELD LIST

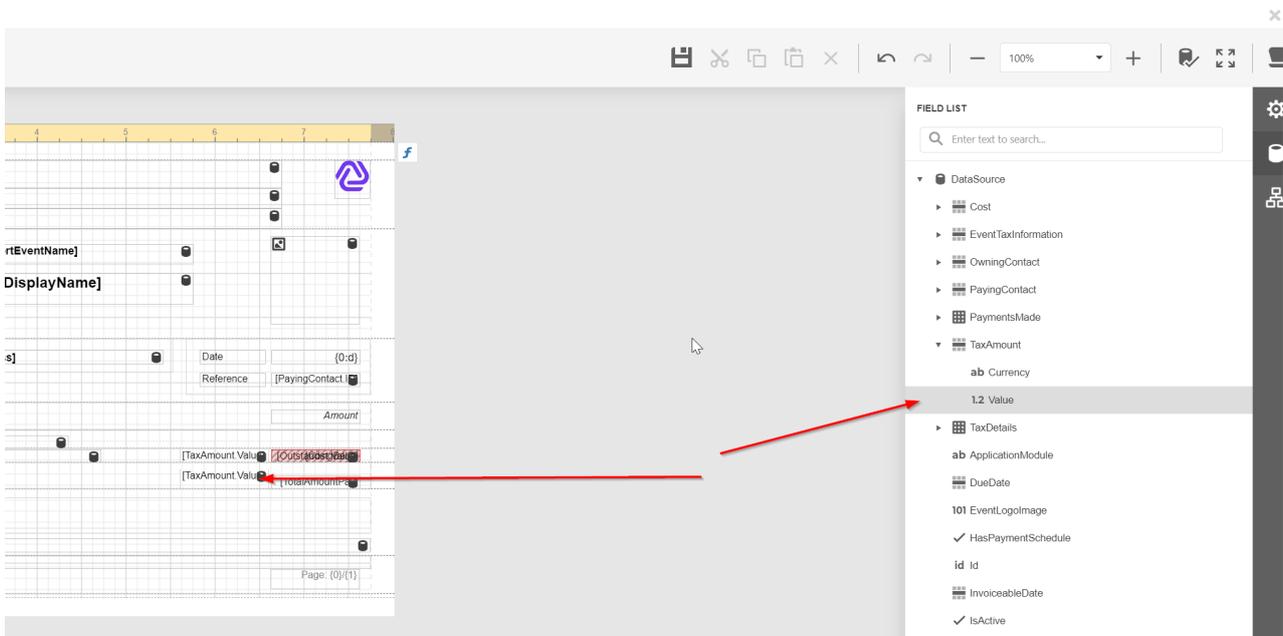
Enter text to search...

- DataSource
 - Cost
 - EventTaxInformation
 - OwningContact
 - PayingContact
 - PaymentsMade
- TaxAmount
 - ab Currency
 - 1.2 Value
 - TaxDetails
 - ab ApplicationModule
 - DueDate
 - 101 EventLogImage
 - ✓ HasPaymentSchedule
 - id Id
 -

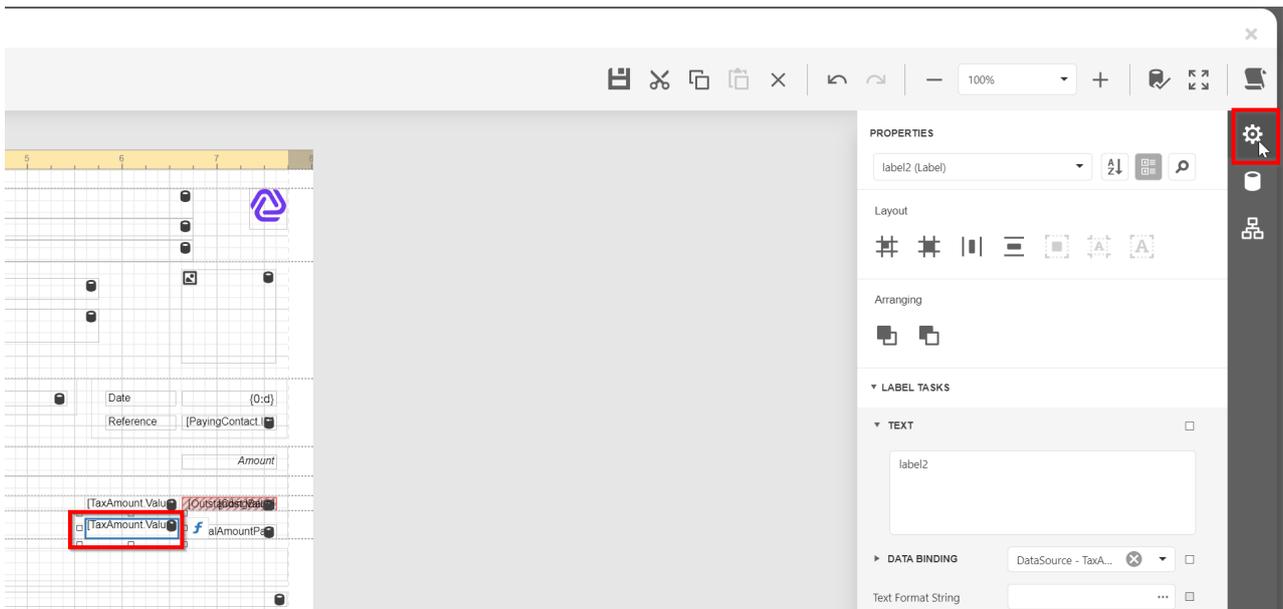
10. Click and drag **Value** into the Detail band of the report.



11. Click and drag **Value** again into the group footer of the report.

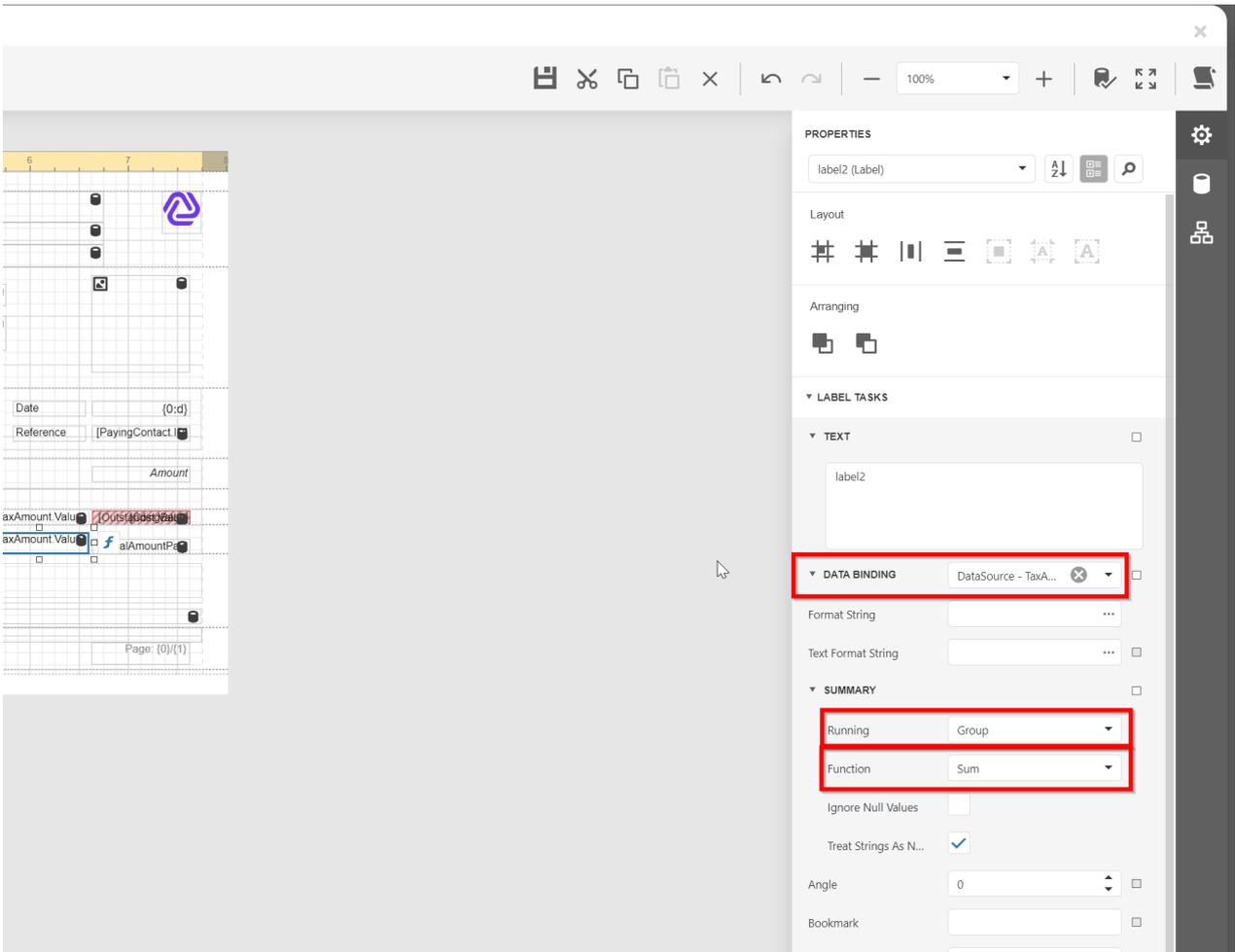


12. Click the **latest added** label and click the **properties** icon on the right side panel

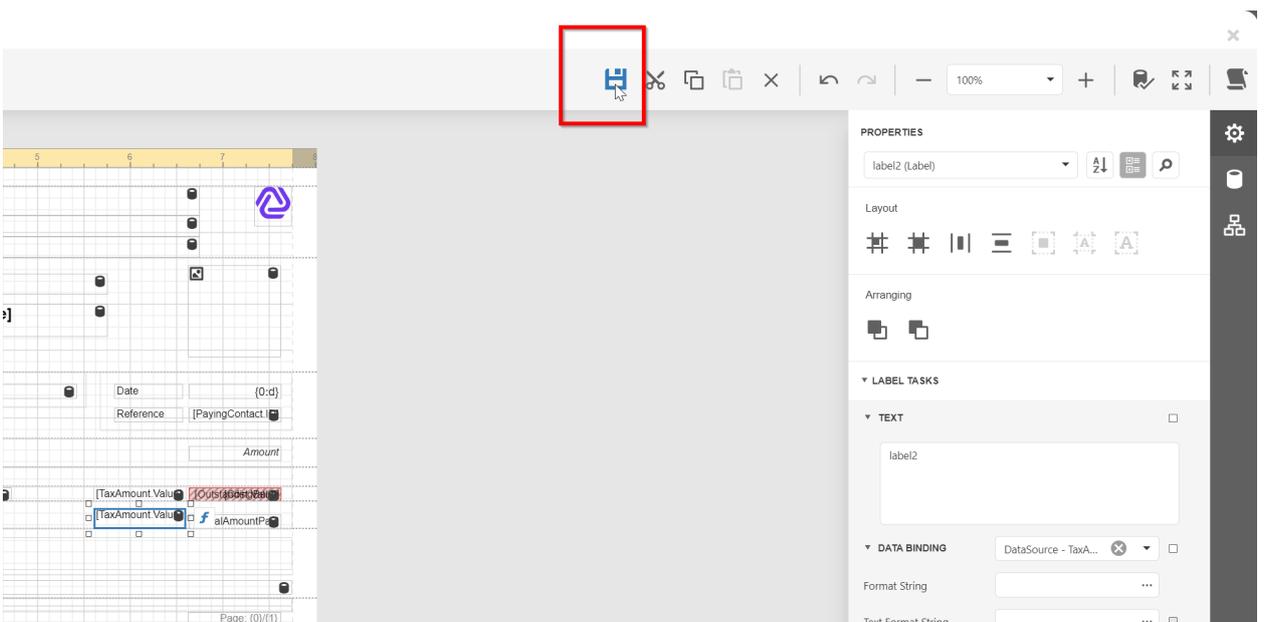


13. Check the **Label Tasks** section on the right and Ensure the values are as follows:

- Data Binding : **DataSource – TaxAmount.Value**
- Summary function: **Sum**
- Summary Running: **Group**



14. Save the report



16. Your Pro Forma invoice will now have tax information.