



Help Desk Notes



Tax Exceptions for Sales Items

Do you ever need to make the same sales item taxable for some areas and non-taxable for others? For example, perhaps your city charges sales tax on delivery charges, but a neighboring city doesn't. How do you manage those exceptions? Easy!

Go to the item and note if it is taxable or not. In this example, this delivery charge is NOT taxable.

A screenshot of the "SALES UPDATE" screen in the software. The screen displays various fields for item information, including "Mfg Catalog #", "Name", "Category", "Substitute Part", "GL Account #s", "Package Item", "Units/Package", "Discount Type", "Serial", "Bill Type", "Income", "Inventory", "COGS", "Package Code", "Defer Select", "For Sale", "SL Type", and "Pricing Method". The "Tax Status" field is highlighted with a red box and shows the value "N".

Mfg Catalog #	BWTR			Detail Report			
Name	BRIDGEWATER DEL/TRIP						
Category	DE DELIVERY INCOME						
Substitute Part							
GL Account #s	Income:	59210	Inventory:	59210	COGS:	59210	
Package Item							
Units/Package	1	Package Code					
Discount Type	N NOT DISCOUNTABLE						
Serial	N	Defer Select		For Sale	Y	Tax Status	N
Bill Type	R	SL Type	R	Pricing Method	R		

To make it taxable for other tax areas, go to the Edit pulldown and select Tax Exceptions.

Edit View Action Help

Add
Change
Delete

Name
Quantity on Hand
Acquisition/Receiving
Print Notes
Related Sales Items
Serial Numbers
Purchase Order
Vendor Detail
Customer Discount
Quantity Discount
Attachments
Tax Exceptions

File Edit View Help

F2Prev F3Next F4Zoom Acthp

SALES ITEM TAX EXCEPTION

Mfg Category#: BWTR
Name: BRIDGEWATER DEL/TRIP
Normal Tax Status: N

Tax Area	Tax Status
89506 RENO	Y

TAX AREA	DESCRIPTION
100	MY TAX AREA
200	TEST ARE
80916	COLORADO SPRINGS
80918	COLORADO SPRINGS CO
89506	RENO
94103	SAN FRANCISCO
ARV-01	ARVADA 80001
BC1	BRITISH COLUMBIA TAX #1
JP1	KEMPNET

Add the tax areas where it IS taxable and type a Y for tax status.

Now if you have a ticket with this delivery item on it going to tax area 89506, tax will be assessed on the delivery charge!

If the sales item is set up in your system as Taxable, simply do the reverse of these instructions and make the Tax Area Tax Status N for No.