

Sales Tax Overrides

Last Modified on 07/24/2023 7:12 am CDT

A Sales Tax Override may be applied to a line item based on Customer Classification, Product Classification, and the State and Adjustment Codes that default based on the sales tax hierarchy. Each Override can optionally be set up with a user-defined message that displays when a product with that exception is selected on an Invoice. If there are multiple exceptions that apply to a line item, the appropriate exception must be selected. Sales Tax Overrides are set up at *Setup / A/R / Sales Tax Overrides*.

Choose **Add Row** to add a new override. The *Cust Class*, *Prod Class*, *Def State Code*, and *Def Adj Code* may be used as criteria to apply a specific code, rate, or exemption override to a customer Invoice. For the override to be applied, the customer, product, or location must meet the criteria selected on the *Override* screen. The override may apply to all customers or all products by not specifying a Customer or Product Classification. When applying a Sales Tax Override, the sales tax hierarchy is still followed.

	<Cust Class>	<Prod Class>	<Def State Code>	<Def Adj Code>	<State Code>	<Adj Code>	Taxrate	Exemption	Message	Delete
1		Gasohol	IL-Shelby		IL-Shelby5					<input type="checkbox"/>
2		Feed			IL-Douglas...					<input type="checkbox"/>
3		Agronomy						Agricultural Use		<input type="checkbox"/>
4	Anyhdrous	Fertilizer	IL	Rose	IA	Elm				<input type="checkbox"/>

Buttons: Add Row, OK, Cancel

If the option of *Default* is selected in the *State Code* or *Adj Code* columns along with a selected exemption, the resulting Invoice displays the codes based on the sales tax hierarchy and applies the Sales Tax Exemption. This is helpful for reporting tax exempt sales under a tax code.

Tax Code	Tax Rate
CA	7.25
Default	0
HI	4
IA	6
IL	6.25
IL-Douglas Feed	3.3
IL-Douglas Live	9.25
IL-Shelby	7.25

Buttons: Select, Cancel

	Product Name	Your Share	Tax	Sales Tax	Prepaid Tax	Prepay Status	Tax Rate	<State Code>	<Adj Code>	Exemption
1	Pretty Bird Feed	225.00	<input type="checkbox"/>	0.00	0.00		7.5000	IL	Safety	Municipality