

Sales Tax Rate Change

Permanent Invoice Tax Change

From the Main Menu select the following options:

#7 Files

#18 Tax Locality Master

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South Point Systems Inc.                               Program: TL001M
Date---: 8/14/03
Time---: 15:37:39
User---: SARAH

TAX LOCALITY MASTER ADDITIONS/MAINTENANCE

Enter Tax Locality to Add or Change--: .....
Enter Tax Locality Tax Rate (.6 Dec.): .....
(Each Taxable Locality Will Automatically Have A Non-Taxble Record Added)

NOTE: If you wish to change the tax rate for existing customers who have
been assigned to the Default Tax Locality and Tax Rate in the
Location Master then add the new Locality/Rate here. After adding
the new Locality/Rate go to the Location Master and change the
default Locality/Rate under the Overall Part I Section. You will
then be given the opportunity to change the defaults in existing
customers and open work orders.

F5 - DISPLAY CURRENT TAX LOCALITIES
F7 - EXIT PROGRAM
F9 - GENERATE TAX LOCALITY MASTER REPORT
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Enter tax locality to add or change (F5 to view established localities)

If tax rate is already established, proceed to Customer Master to update record!

On command line: CM (Customer Master)

Enter customer number to add or change

Mark pickup/delivery "D", otherwise it will default to the rate in the store master (See support doc for Store Master defaults)

Occasional Invoice Tax Change

OPTION 1 To override store master tax rate on entire invoice-change tax locality and tax rate on the first screen.

OPTION 2 To override store master tax rate per item on the invoice-change the tax locality and tax rate on the screen where you enter the quantity ordered and quantity shipped.

If you need additional information, email support@southpoint.net or call our office.