

## Sales Tax – Rate Changes

### Option 1: Permanent Sales Tax Rate Change

From the Main Menu select the following options:

#7 Files

#5 Customer Master

Type in Customer Number to work with, Enter

Select to work with “Invoice Creation and Handling Information”

### Screen 1 of this section has the following choices:

Hold Backorders.....(H): \* (H = Hold Backorders)  
 Master Override Pricing Level.: \*  
 Master Off Invoice Discount...: \* (.4)  
 Additional Add On/Off Percent: (.2)  
 Pickup/Delivery Default.....: \* (D = Delivery, P = Pickup)  
 Delivery Zone.....: \*  
 Delivery Surcharge Pct ... (.2)...: \*  
 Default Shipping Method.....: \*  
 Shipping Method Notation.....: \*  
 Default Ship C.O.D.....: \* (Move cursor to this field and Press F4)  
 Suppress Prices.....: \* (A B C D E and Y / Press F4 for List )  
 Invoicing Surcharge Codes.....: \* (Move cursor to the field and Press F4)  
 Omit Shipping Surcharges....(Y): (Y – Yes)

Tip: Enter ‘D’ for Delivery Default if you want invoicing to default to Customer Master Record, not Store Master

Zone Master Charges:

Enter to Continue ( + ) F4 - Field Definitions  
 F1 - Update Changes F5 – First Screen  
 F2 - Page Back ( - ) F7 - Exit Program  
 F8 - View Delivery Zones  
 F15 – View Shipping Methods

### Screen 2 of the section has the following choices:

Default Charge/Paid/Cr Card: \* C = Charge P = Paid W = Credit Card  
 Assigned Sales Person : \*  
 Automatic Core Credit (Y) : \*  
 Sales Tax Number :  
 Sales Tax Locality : \* (State Customer’s Business is Located)  
 Override Tax Percent (.6) : \* .000000 % (Setup Tax Rates in Tax Locality Master)  
 Resale Customer Code (R) : (Customer is never charged Sales Tax)  
 Tax override for T Parts (N) : (Customer is not charged tax on T code Parts)  
 Permanent P.O. Number :  
 Mandatory P.O. Number : (Y = Yes)  
 Your Vendor Number :  
 Assigned Label Group : \*  
 Requisition/Contract Number:

Enter to Continue F4 - Field Definitions  
 F1 - Update Changes ( + ) F5 - First Screen  
 F2 - Page Back ( - ) F7 - Exit Program  
 F10 – Work With Tax Localities  
 F15 - Display Sales Personnel  
 F20 - Display Customers / Name  
 F22 - View Established Groups

Example: Your overall store sales tax rate is 7% but you have a customer that should be charged only 6%. You would enter the 6% tax rate into the Customer Master and also “D” for delivery. If “P” for pick up is used the software defaults to the tax rate in the store master.

**Option 2: Temporary Sales Tax Rate Change**

From the Main Menu select the following options:

#1 Sales

#1 Invoicing Estimates and Work Orders

Type in Sales Person Number, Field Exit

Type in Customer Number, Field Exit

Enter

On Screen 1 – Change Tax Rate to temporary tax rate

Field Exit

Invoice Customer as usual

Tip: You must enter a Sales Tax Rate that is established in the Tax Locality Master. Otherwise, you will receive an error message.
------------------------------------------------------------------------------------------------------------------------------------

You can also manually override any rate through invoicing.

If you need additional information, email [support@southpoint.net](mailto:support@southpoint.net) or call our office.