

Tax Override

Overview

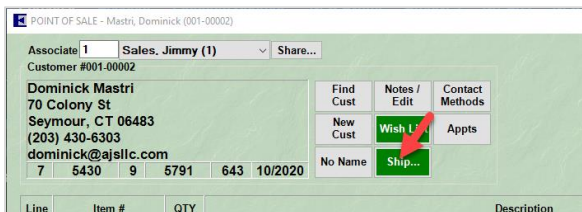
The **Tax Override** feature allows you to manually enter sales tax amounts at POS rather than having to set up tax definitions. Note this only applies to transactions being shipped. It is not possible to override the tax on an instore sale.

This allows you to calculate the correct state and local sales tax using an external website or app and then you can manually enter those amounts into The Edge.

Overriding Tax

To override tax at POS:

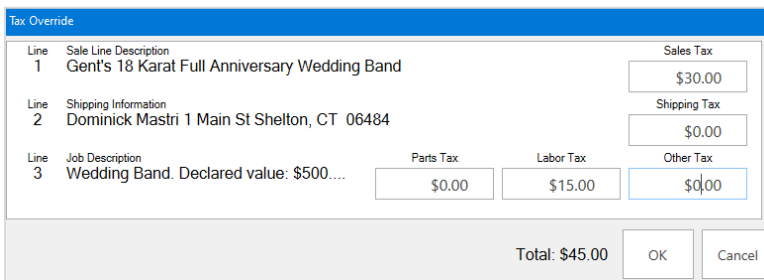
1. Enter sale details at POS. You must use the **Ship...** button to specify a **Shipping Address**, otherwise the override option will not be available.



2. In the bottom right, click the drop-down arrow next to **Sales Tax**.



3. That associate must have the permission "Allow Ship To Tax Changes at POS" in order to proceed.
4. The **Tax Override** window will appear. Each line from the sale will be displayed along with the sales tax being charged.



5. Enter the tax amounts you wish to collect, then click **OK**. Note that for repair and custom jobs, you can split the sales tax between **Parts**, **Labor**, and **Other** if necessary.
6. Complete the transaction.

Reporting

Sales Tax

Reports > Activity > Sales Tax

The Sales Tax report will separate out all transactions that have tax overrides under the section **Tax Override**.

Sales Tax Report

8/1/2022
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30 Days (7/3/2022 to 8/1/2022). Other Selected Options: Show Taxable Only, Show Each Sale, Show Trades As Other (Vs Goods), Rewards Reduce Taxable Amount Group By: Sale #, Sort By: Sale #, Store, Ship to State, Day, Month.

Date	Sale #	Ship	Goods			Services			Other																		
			Non-Taxable	Taxable	Tax	Non-Taxable	Taxable	Tax	Non-Taxable	Taxable	Tax																
Tax Override																											
7/27/2022	001-126444	NY	\$0.00	\$3,990.00	\$315.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00																
8/1/2022	001-126446	NY	\$0.00	\$0.00	\$0.00	\$0.00	\$901.00	\$75.16	\$0.00	\$0.00	\$0.00																
8/1/2022	001-126447	ND	\$0.00	\$49.00	\$7.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00																
8/1/2022	001-126448	NY	\$0.00	\$155.00	\$15.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00																
8/1/2022	001-126449	ND	\$0.00	\$349.00	\$30.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00																
8/1/2022	001-126450	NY	\$0.00	\$899.00	\$65.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00																
Tax Override			\$0.00	\$5,442.00	\$432.00	\$0.00	\$901.00	\$75.16	\$0.00	\$0.00	\$0.00																
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<table border="1"> <thead> <tr> <th colspan="2">Goods + Services + Other</th> </tr> </thead> <tbody> <tr> <td>Gross Sales</td> <td>\$6,343.00</td> </tr> <tr> <td>Taxable</td> <td>\$6,343.00</td> </tr> <tr> <td>Non-Taxable</td> <td>\$0.00</td> </tr> <tr> <td>Tax</td> <td>\$507.16</td> </tr> <tr> <td>Sales + Tax</td> <td>\$6,850.16</td> </tr> <tr> <td>Out of State Sales</td> <td>6 \$0.00</td> </tr> <tr> <td>Customers Exempt **</td> <td>0 \$0.00</td> </tr> </tbody> </table>												Goods + Services + Other		Gross Sales	\$6,343.00	Taxable	\$6,343.00	Non-Taxable	\$0.00	Tax	\$507.16	Sales + Tax	\$6,850.16	Out of State Sales	6 \$0.00	Customers Exempt **	0 \$0.00
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Sales by State

Reports > Activity > Sales by State

This report will breakdown the sales tax collected based on the state it was shipped to.

Sales Total By State Report

State	Store	Sales Total	Tax Collected	# of Transactions	# of Customers
CA	1	\$641.00	\$45.00	1	1
RI	1	\$1,875.00	\$187.00	1	1
Grand Totals		\$2,516.00	\$45.00	2	2