# 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.

Associate 1 Sales, Jimmy (1) V Share										
Custome	r #001-0	0002								
Domini 70 Cold	ick Ma ony St	stri			Find Notes / Con Cust Edit Meth	Contact Methods	act ods			
Seymo (203) 4	ur, CT 30-630	06483	3		New Cust	Wish Li	Appts			
domini	ck@a	sllc.c	om			No Name	China			
7	5430	9	5791	643	10/2020	No Marine	Surb			

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

	Done	Sub Total	\$600.00
		Sales Tax 🖂	\$38.10
		Total	\$638.10
1	Save to Wish List	Tendered	\$0.00
		Due	\$638.10

- 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.

Tax Override							
Line	Sale Line Description	Sales Tax					
1	1 Gent's 18 Karat Full Anniversary Wedding Band						
Line	Shipping Tax						
2	2 Dominick Mastri 1 Main St Shelton, CT 06484						
Line	Job Description	Parts Tax	Labor Tax	Other Tax			
3	Wedding Band. Declared value: \$500	\$0,00					
			Total: \$45.00	OK Cancel			

- 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.

8/1/2022

Page 2 of 3

## 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

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;

			Goods			Services			Other		
Date	Sale #	Ship	Non-Taxable	Taxable	Tax	Non- Taxable	Taxable	Tax	Non- Taxable	Taxable	Tax
Tax Overn	ide										
7/27/2022	001-126444	NY	\$0.00	\$3,990.00	\$315.00	50.00	\$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	50.00	\$49.00	\$7.00	50.00	\$0.00	\$0.00	\$0.00	\$0.00	50.00
8/1/2022	001-126448	NY	\$0.00	\$155.00	\$15.00	50.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
8/1/2022	001-126449	ND	\$0.00	\$349.00	\$30.00	50.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
8/1/2022	001-126450	NY	50.00	\$899.00	\$65.00	\$8.00	50.00	\$0.00	\$0.00	\$0.00	\$0.00
	т	ax Override	\$0.00	\$5,442.00	\$432.00	\$0.00	\$901.00	\$75.16	\$0.00	\$0.00	\$0.0
			S.	5,442.00			\$901.00				\$0.00
									Goods + Serv	ices + Other	
									Gross	Sales	\$6,343.00
									Т	axable	\$6,343.00
									Non-T	axable	\$0.00
										Tax	\$507.16
									Sale	s + Tax	\$6,850.16
									Out of State	Sales 6	\$0.00
									Customers Exe	mpt ** 0	\$0.00

### 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					