

Manual Only Sales Tax

Overview

A new **Manual only - select at POS** checkbox has been added to **Sales Tax Definitions** in the new Desktop UI. This setting allows a sales tax definition to remain available for use without being automatically applied to qualifying transactions.

When the checkbox is enabled, the tax definition must be **manually selected at Point of Sale** when it is needed. This gives stores more control over tax rates that should only be used in specific circumstances rather than applied based on the standard tax setup.

This option was developed to support South Carolina's sales tax reduction for qualifying customers age 85 and older. When an eligible customer requests the reduction, the appropriate manually configured tax definition can be selected at Point of Sale to reduce the state sales tax rate by one percentage point while leaving applicable local taxes unchanged.

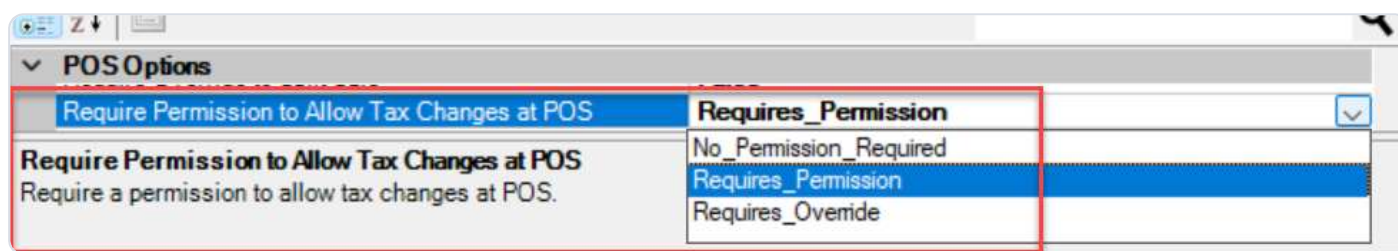
Setup

To enable this option, open the applicable **Sales Tax Definition** and check **Manual only - select at POS**. Once enabled, the tax definition will be available for associates to select when completing an eligible transaction.

System Option

A **System Option** determines whether changing sales tax at **Point of Sale** can be completed by any Associate, requires a specific permission, or requires an override from an authorized Associate.

1. Use the Search bar at the top of the screen to find **System Options**, or click the gear icon in the upper-right corner and scroll to **System Options > POS Options**.
2. Locate **Require Permission to Allow Tax Changes at POS**.



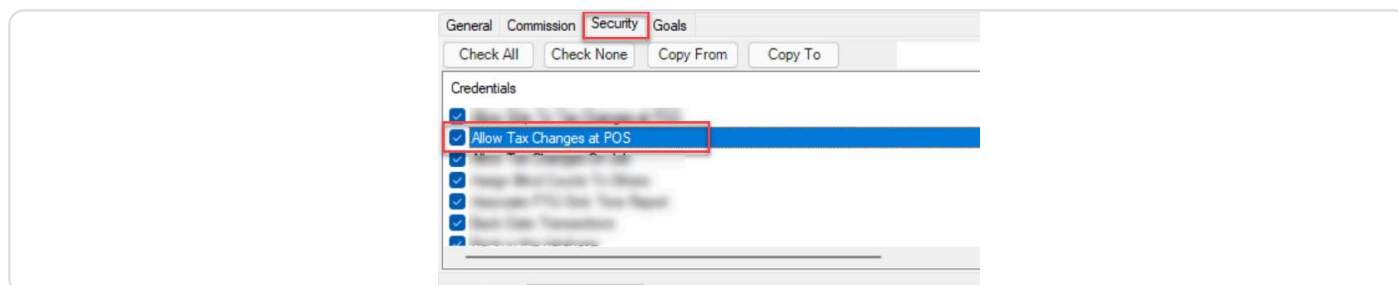
Choose the setting that best matches how your store should control **tax changes at POS**:

- ▶ **No_Permission_Required** - Any Associate can change the sales tax at POS without an additional permission or override.
- ▶ **Requires_Permission** - The Associate making the change must have the **Allow Tax Changes at POS** permission enabled on their Associate record.
- ▶ **Requires_Override** - An override window appears when sales tax changes are accessed at POS. A manager or other Associate with the **Allow Tax Changes at POS** permission must enter their login to authorize the change.

Associate Permissions

If your store uses **Requires_Permission** or **Requires_Override**, the next step is to grant the **Allow Tax Changes at POS** permission to the Associates who should be authorized to make or approve tax changes.

1. Use the Search bar to find **Administer Associates**, or navigate to **Settings > System Administration > Administer Associates > Manage Associate Records**. Select the Associate and open the **Security** tab.
2. Locate and check **Allow Tax Changes at POS**, then choose a **Save** option to apply the permission.



Create a Manual Only Tax Definition

Create a new Sales Tax Definition or update an existing one to make the tax available for manual selection at Point of Sale.

1. Use the Search bar to find **Tax Definitions**, or navigate to **Settings > Advanced Settings > Sales Tax Administration > Tax Definitions**.
2. Click **Add** to create a new tax definition, or highlight an existing tax definition and click **Edit**.
3. Check **Manual only - select at POS**, then choose a **Save** option.

Sales Tax Definition 'CT Sales'.

THE EDGE Search

General Categories Stores Misc. Other

ID CT Sales ☐ Inactive ☒ Manual only - select at POS

Description CT Sales Tax

Rate % 6.3500% Rounding 0.005 Refund Threshold -1

☐ Flat Rate

Qualifying Sales

All Sales

of at least

but not more than

Exemptions

This tax is NOT collected on...

The First

The Amount Over

Dates

This tax is only collected on sales made

starting

ending

Qualifying Customers

All Customers

Edge

You have made changes to The Edge® Taxes. These changes will not take effect until after you close and restart The Edge®. All other active users need to be informed of the need to restart The Edge®. Do you want to close The Edge® now?

Yes No Cancel

4. Restart The Edge when prompted so the tax definition changes can take effect.

NOTE

For additional information about creating and configuring Sales Tax Definitions, see [Setting Up Sales Tax Definitions](#) in the Edge Knowledge Base.

View and Manage Saved Tax Definitions

Return to **Tax Definitions** at any time to view or edit your saved tax definitions. The new **Manual** column makes it easy to identify definitions configured for manual selection at POS, and you can use the **Manual** sort/filter option to group or locate those definitions more quickly.

List of Tax Definitions: (1)

THE EDGE						
Search						
ID	Description	Rate	Start Date	End Date	Manual	
TestTaxCT	CT alternate tax	5.0000%				
CT Sales	CT Sales Tax	6.3500%				

Applying a Manual Only Tax at POS

A Manual Only tax can be applied at either the beginning or end of a Point of Sale transaction. If you know the alternate tax applies, select it at the beginning so tax is calculated using the manual rate throughout the transaction. You can also apply it just before providing the customer with the total and accepting a tender option.

1. Click the **Sales Tax** dropdown. What happens next depends on the **Require Permission to Allow Tax Changes at POS** System Option: tax changes may open immediately, require the current Associate to have permission, or require an authorized Associate to provide an override.

2. Uncheck the default **Sales Tax** definition(s) that should no longer apply to the transaction.
3. Check the appropriate **Manual Only** tax definition.

Step 2: uncheck the default definitions

Step 3: check the Manual Only definition

4. Click **OK** to apply the selected tax. If the change is made at the end of the transaction, the **Sales Tax** amount and transaction total will recalculate using the newly selected tax definition.