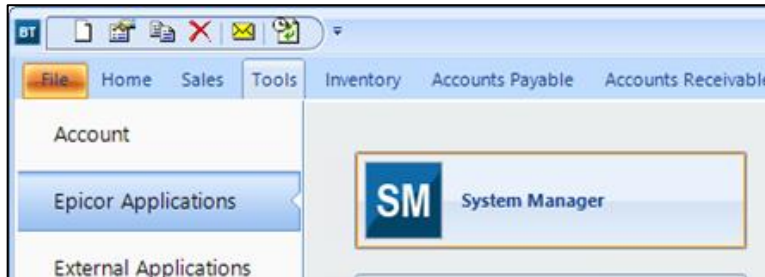
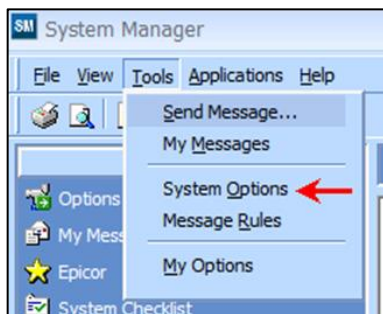


Sales Tax Overview Options

1. There a number of system options related to tax. To access these options, go to File, 'Epicor Applications', and 'System Manger'.



2. Now click on 'Tools' and then open 'System Options'.



3. Select the 'List' method and enter 'tax' in the 'Find' dialog box.
4. Under the 'General/Company Group', locate the 'Tax registration number' option. This is a government assigned business number that identifies your business to the tax authorities. Update the 'Value'.

System Options List		
Find: tax <input type="button" value="Go"/>		
Group	Option	Value
General -> Company	Tax registration number	123 456 7890
Financial -> General	Calculate tax on goods less discount	No
Financial -> General	Calculate tax from transaction totals	Yes
Financial -> General	Calculate tax based on branch tax area	Yes on Collect Sales and Manual Credits
Financial -> General	Use Washington state tax rate validation	No

5. From the 'Financial/General Group', located 'Calculate tax based on branch tax area'.
 - a. Setting this to 'No' causes tax to be calculated based on the customer's delivery address regardless of sale type.
 - b. You can choose 'Yes on Collect Sales and Manual Credits' to tax Delivered sale types using the customer's tax area instead of the Branch tax area. Manual credits where the original invoice is not used will utilize the branch tax area.
 - c. 'Yes Always' will calculate tax based on Branch tax area.
 - d. 'Yes (except out of state sales)' will use the Branch tax area except when the delivery address is in another state.

Yes on Collect Sales and Manual Credits
No
Yes Always
Yes on Collect Sales and Manual Credits
Yes (except out of state sales)

6. Third for consideration is Operational > Orders – General group 'Show tax area on sales order and credit note tool bar'.
 - a. With set to 'Yes', the tax area being used is displayed in sales documents and can be changed through a button on the toolbar.
 - b. When set to 'No', the tax area can only be changed through the order lines Tax tab.

Operational -> Orders - General	Show tax area on sales order and credit note tool bar	Yes
		Yes
		No

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