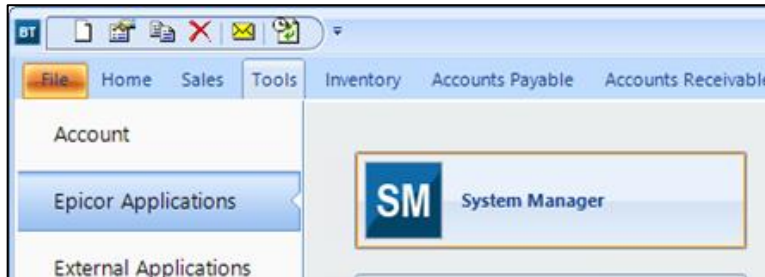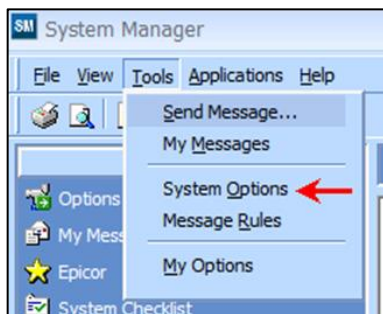# Sales Tax Overview Options

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'.

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	

About Epicor

Epicor Software Corporation drives business growth. We provide flexible, industry-specific software that is designed around the needs of our manufacturing, distribution, retail, and service industry customers. More than 40 years of experience with our customers' unique business processes and operational requirements is built into every solution—in the cloud, hosted, or on premises. With a deep understanding of your industry, Epicor solutions spur growth while managing complexity. The result is powerful solutions that free your resources so you can grow your business. For more information, connect with Epicor or visit www.epicor.com.

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