Using Sales Tax

Andrew to customer:

We'll process your order, and send you an invoice with the details including the tax break down and other order specifics… Thanks for calling, have a great day!

Robert to viewer:

Understanding Tax Area, Tax Groups, and Tax Rates helps you appropriately charge and track taxes. BisTrack streamlines tracking and applying appropriate taxes to orders to keep it clear and simple.

Click a Topic, and we'll walk you through the details!

Topics

- Sales Documents
- Credit Notes
- Detail Report

Sales Documents

BisTrack uses the Tax Area, Tax Groups, and Tax Rates to assure that you quickly and accurately calculate and track required taxes.

Your System Administrator sets up Tax Codes that streamline tax calculations when you enter Sales Orders.

When you select a Customer, BisTrack considers their Deliver To address to determine the Tax Area shown on the Tool Bar.

You can see the Tax Rate Code for each item line in the Tax column.

The Tax Area works with the products Tax Group, the Sale type, and Tax rates to determine the total tax due on the Sales Order.

To see tax details for an item, open the Order Line properties for the line and select the Tax tab.

This shows you that the tax is based on a percentage of sales for an amount and shows the Total Tax amount.

You can adjust how BisTrack calculates the tax by selecting the Change button.

To adjust the tax for a specific line, choose an option from the Tax group drop-down menu.

Choose an option from the Tax area drop-down menu if you want to change the tax for the entire sales order.

If you have a Tax Exemption certificate for the sales order, enable the Use tax exemption certificate if exists check box. This affects the entire Sales Order.

On a Manual Order Line, you can change the Tax group by selecting a different group from the dropdown.

This recalculates the line's Tax total and adjusts the Sales Order's Total tax accordingly.

Select the Tax Area button to select a different Tax area for the order.

Use the Tax area dropdown or enable the Use tax exemption certificate if exists option to affect the entire Sales Order.

You can adjust the Tax group from each line's properties window.

When you set the Sale Type to Quick Sale or Will Call, BisTrack changes the Tax area to match the branch location's tax area.

BisTrack uses the Tax Area, Tax Groups, and Tax Rates to assure that you quickly and accurately calculate and track required taxes.

Credit Notes

When you create a Credit note, BisTrack will automatically transfer information from the invoice.

Read More…

Transferred fields

- Tax Area
- Product Tax Group
- Tax rates

When you create a Credit Note from an invoice, BisTrack carries the Tax Area, product Tax Group, and Tax rates from the invoice.

You can adjust the Tax area while on the Credit Note.

Open a line to see more details including the Total tax and Tax group.

Because these are taken from the invoice, BisTrack prevents you from editing them here.

You can manually add products to the Credit Note.

Select Other lines, and use the Quick Entry field to add a product.

Manually added Credit Note lines calculate the Total tax according to the Product Tax Group and system options set by your administrator.

You can use the dropdown to change the Product Tax group.

Press OK to add the line.

BisTrack simplifies managing tax amounts efficiently by automatically transferring them from invoices onto Credit Notes.

Detail Report

Use the Tax Detail report to view tax history information.

Read More…

Adjust the settings to limit or customize your results.

- Branch
- Tax Areas

- Date Range
- Transaction Details
- Show Summaries

The Tax Detail report lists tax transactions and totals.

In the Navigations tab, select Reports, then Tax, and then Tax Details.

Open the Tax Detail report.

Set the parameters for the report.

You can narrow your search to specific branches if desired.

Use the ellipsis button to search for a branch if you want narrow your search.

Press Next

On the next screen you can enter tax areas to include in the report. Use a comma to separate multiple tax areas.

To include all tax areas, leave it blank.

Press Next.

Set the Date Range for the report, and press next.

Choose which Transaction Details you want to include in the report.

You can press the Run Now button at any time to generate the report with the chosen parameters.

Press next to show the 5th parameter.

Choose an option to include or exclude Quarter to Date and Year to Date summaries on the report.

Click next to review the parameters set for your report.

Press the back button to edit your selections, or Finish to run the report.

The report viewer displays the report.

Use the printer icon to print it.

The Tax Detail report keeps your tax history information easily accessible with the parameters you choose.

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