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## Tax Exempt Invoices and Items

Sub Total	\$11.66
Tax	\$0.00
Grand Total	\$11.66

This document will cover tax exempting an invoice, both by adding the tax exempt status to the invoice as well as creating a tax exempt customer which can be selected for an invoice. This document will also cover exempting tax from particular items on an invoice.

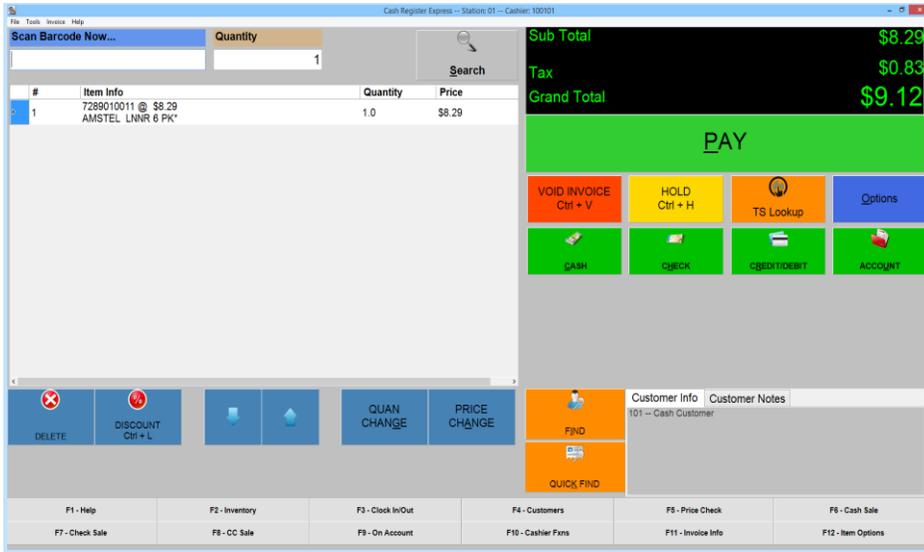
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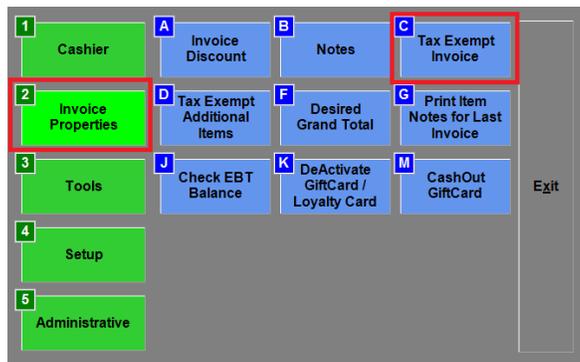
## Revision History

Document Version	Date	Author	Description of Changes
1.0	NA	MP	1st Release
1.1	August 15, 2019	JC	Updating header, structure and adding note for tax exempt for additional items feature.

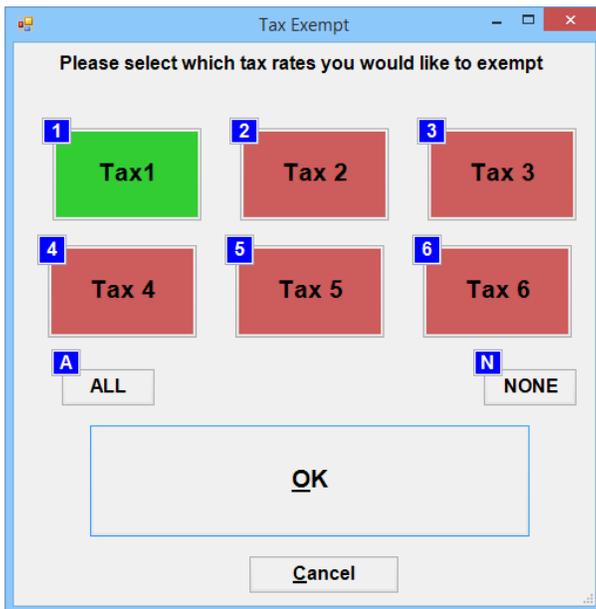
# Tax Exempting the Whole Invoice



1. After adding items to your invoice select the **Options** button.



2. Select **Invoice Properties** (in green).
3. Select **Tax Exempt Invoice** (in blue).

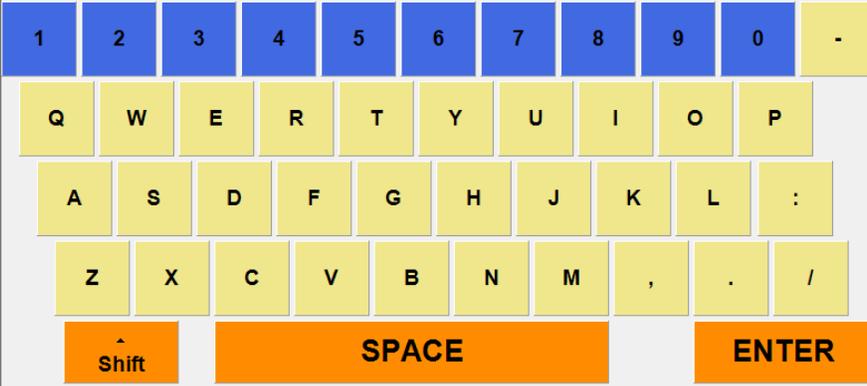


4. Select which tax rates you would like to exempt from the invoice.
  - Use the **All** button to select all of the tax rates
  - Use the **None** button unselect all tax rates
5. Select **OK** when the appropriate tax rates are selected.

Please enter the customer license (Max 20)

Cancel

Backspace



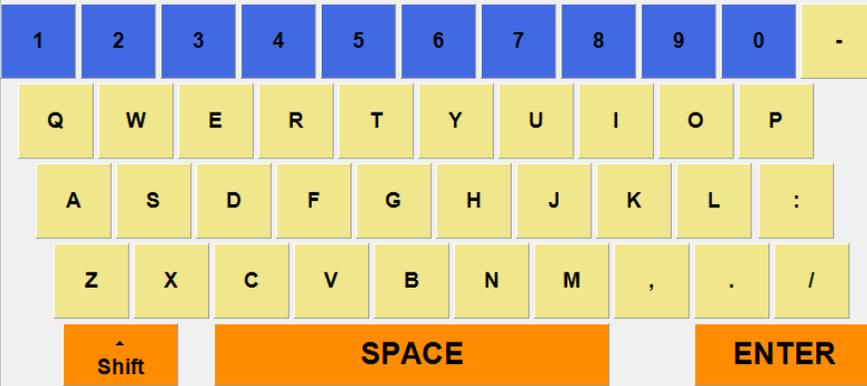
6. Enter the **Customer's License Number**.

7. Select **Enter**.

Please enter the customer license state code (Max 10)

Cancel

Backspace



8. Enter the **Customer's License State Code**.

9. Select **Enter**.

**Enter license expiration date**

June 2017

Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	1
2	3	4	5	6	7	8

Today: 6/9/2017

Type date or select above: 6/30/2017

Buttons: Cancel, Select 6/30/2017

10. Enter the **Customer's License Expiration Date**.
11. Select, **Select [DATE]** (i.e. Select 9/29/2015).

Sub Total	\$8.29
Tax	\$0.00
Grand Total	\$8.29

12. You will then see that the invoice has been exempted from tax. The sale can now be completed without tax being charged.

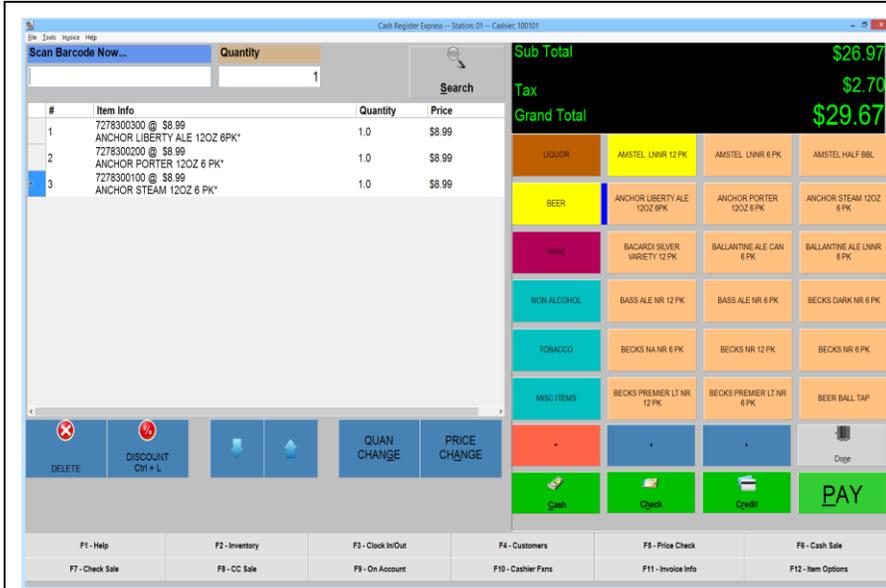
Options:

- 1 Cashier
- 2 Invoice Properties
- 3 Tools
- 4 Setup
- 5 Administrative
- A Invoice Discount
- B Notes
- C Tax Invoice
- D Tax Additional Items
- F Desired Grand Total
- G Print Item Notes for Last Invoice
- J Check EBT Balance
- K DeActivate GiftCard / Loyalty Card
- M CashOut GiftCard
- Exit

13. To charge tax for the whole invoice again select **Options** from the invoice screen.
14. Select **Invoice Properties** (in green).
15. Select **Tax Invoice** (in blue).

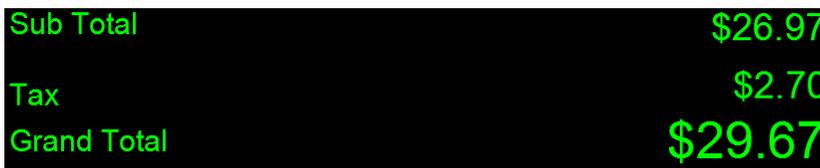
## Exempting Tax from Specific items on an Invoice

In order for this feature to work correctly, you must have the combine lines option unchecked.

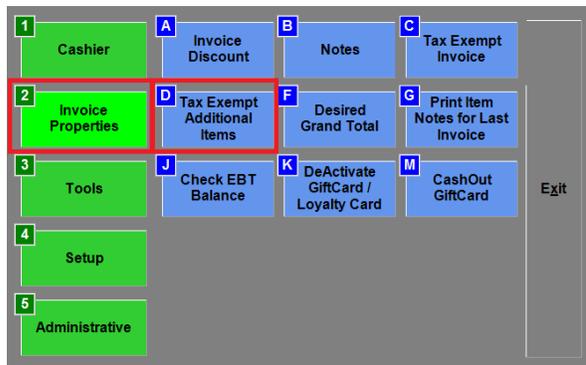


1. After adding items to your invoice that you would like to charge tax for select the **Options** button.

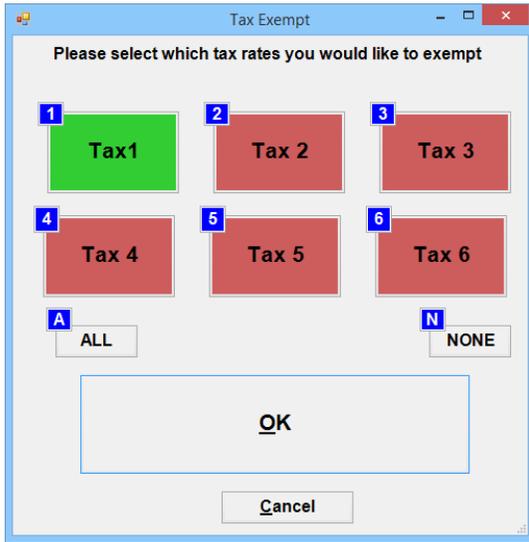
Note: In order for this feature to work correctly, you must have the combine lines option unchecked.



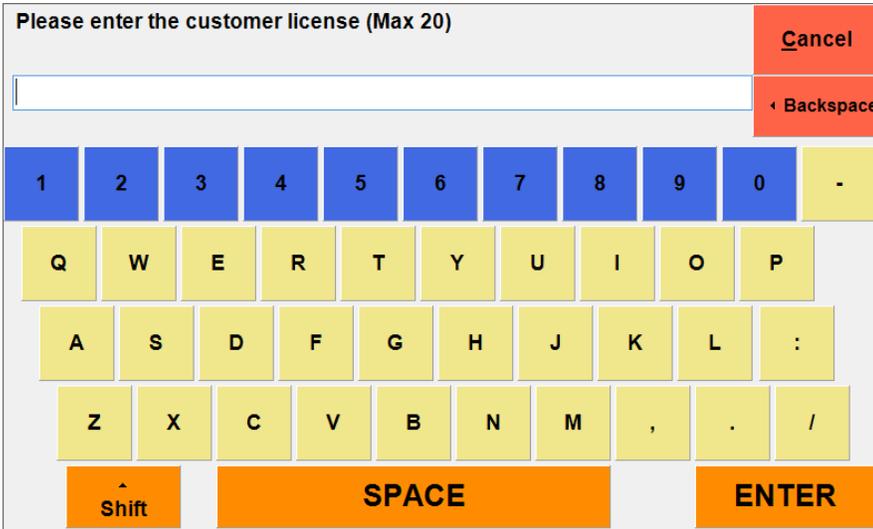
2. Make sure to note that the tax in our example is already \$2.70, and the Sub Total is \$26.97.



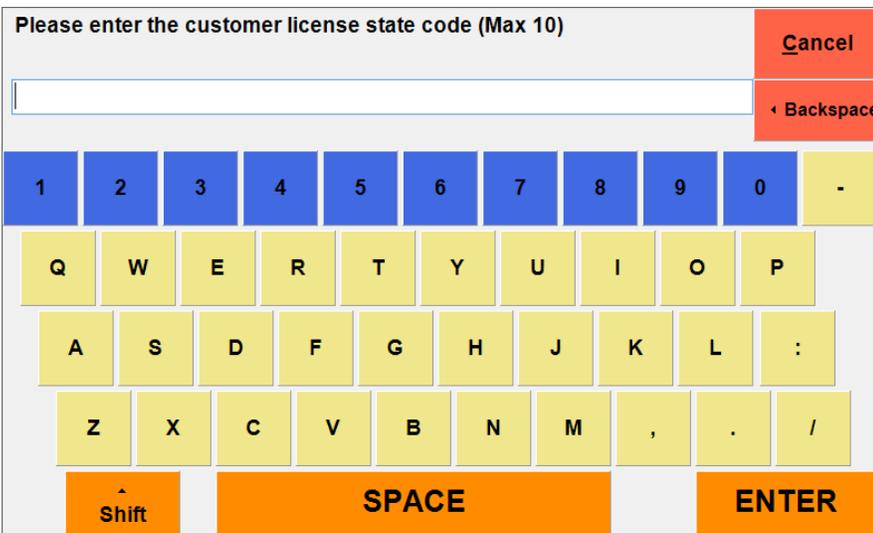
3. Select **Invoice Properties** (in green).
4. Select **Tax Exempt Additional Items** (in blue).



16. Select which tax rates you would like to exempt from the invoice.
  - Use the **All** button to select all of the tax rates
  - Use the **None** button unselect all tax rates
17. Select **OK** when the appropriate tax rates are selected.



18. Enter the **Customer's License Number**.
19. Select **Enter**.



20. Enter the **Customer's License State Code**.
21. Select **Enter**.

**Enter license expiration date**

- 22. Enter the **Customer's License Expiration Date**.
- 23. Select, **Select [DATE]** (i.e. Select 9/29/2015).

Sub Total \$51.25  
 Tax \$2.70  
 Grand Total \$53.95

- 24. Add some more items to the invoice.
- 25. You will then see that the items added to the invoice have been exempted from tax.

- 26. To charge tax for the next items scanned onto the invoice select **Options** from the invoice screen.
- 27. Select **Invoice Properties** (in green).
- 28. Select **Tax Additional Items** (in blue).

## Creating a Tax Exempt Customer

**Manager**

**Options**

1. Select the **Manager** or **Options** button.
2. Enter the administrator password (default: admin) where applicable.
3. Select **Administrative** then, **Customer Maintenance**.

**Customer Maintenance**  
This Customer All Customers Print Customer Labels

Keyboard

Customer #	First Name	Last Name	E-mail Address
8459200880	PCA	Customer	

General Info Extended Info Account Info Shipping/Billing History Notes Properties

Company Name Primary Phone # Bonus Points Achieved

Street Address Alternate Phone # Birthday

Street Address 2 City Application Date

State Zip Code County Card Swipe IDs

Discount Percentage Discount Level NONE

Charge At Cost  Tax Exempt  Print Notes on Receipt

Save Delete

Update Cancel

Previous Next

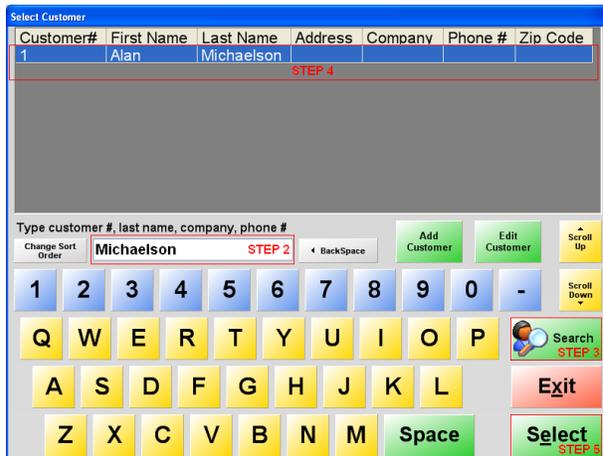
4. At the **Customer Maintenance** screen select **Add**.
5. Enter the following required information:
  - **Customer Number** (tip: Use the phone number as the customer number for easy reference).
  - **First Name**.
  - **Last Name**.
6. If applicable fill in the information under **General Info**.
7. Make sure to select **Tax Exempt**.
8. Select **Save** and then select **Exit**.

## Selecting the Tax Exempt Customer for an Invoice

After adding the items you would like to sell have been added to the invoice we must then select the Tax Exempt customer.



1. Select **FIND**.



2. Enter search terms.
3. Select **Search**.
4. Highlight a customer on the list.
5. Select **Select**.



6. The customer's information will be located near the **FIND** button.



Sub Total	\$11.66
Tax	\$0.00
Grand Total	\$11.66

7. You will then see that the invoice has been exempted from tax.