Sales Tax Corrections

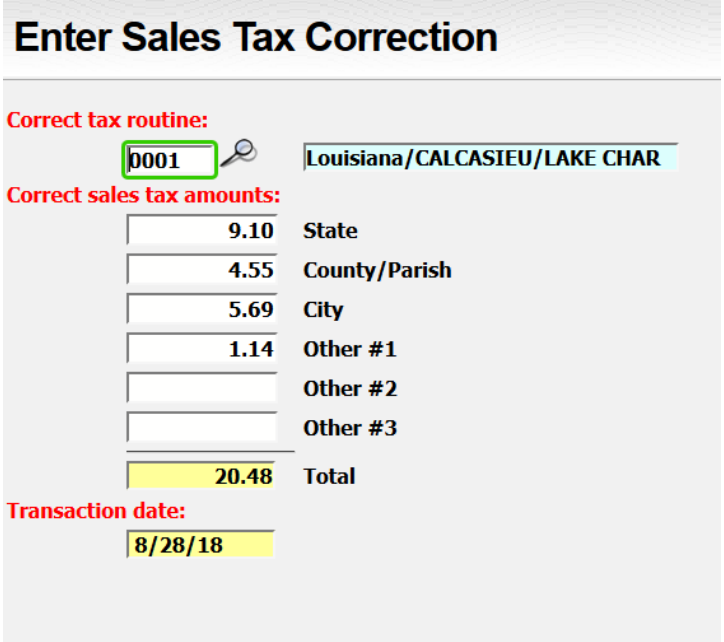
You may need to make a sales tax correction on a customer's invoice. If the invoice is still open in the current journal, you can easily change it before closing. If the invoice is closed, you will need to use one of the options below.

If you <u>do not</u> have to give the customer a revised invoice, make the correction in Accounts Receivable.

1. Start a Cash Receipts Session.
2. Go to Enter Payments and Adjustments.
3. Select Application/Correction with no cash receipt.
4. Enter your customer and click "Submit".
5. Find the invoice and click the "Tax" link on the right (see image).

6. On the Sales Tax Correction screen, change the tax routine to the correct routine and hit the tab key. This will cause the dollar amounts to update.

Sales Tax Corrections



7. Click the "Submit" button.
8. Exit the Application/Correction of A/R Data screen and close the journal.

If you do have to send a revised invoice:

1. Go to Customer Invoicing - Update Invoice File and click "New".
2. Select "Repeat Previous Invoice" and enter the invoice number in the field that appears on the bottom of the screen.
3. Check the box for "Reverse Sign (generate a credit)?".

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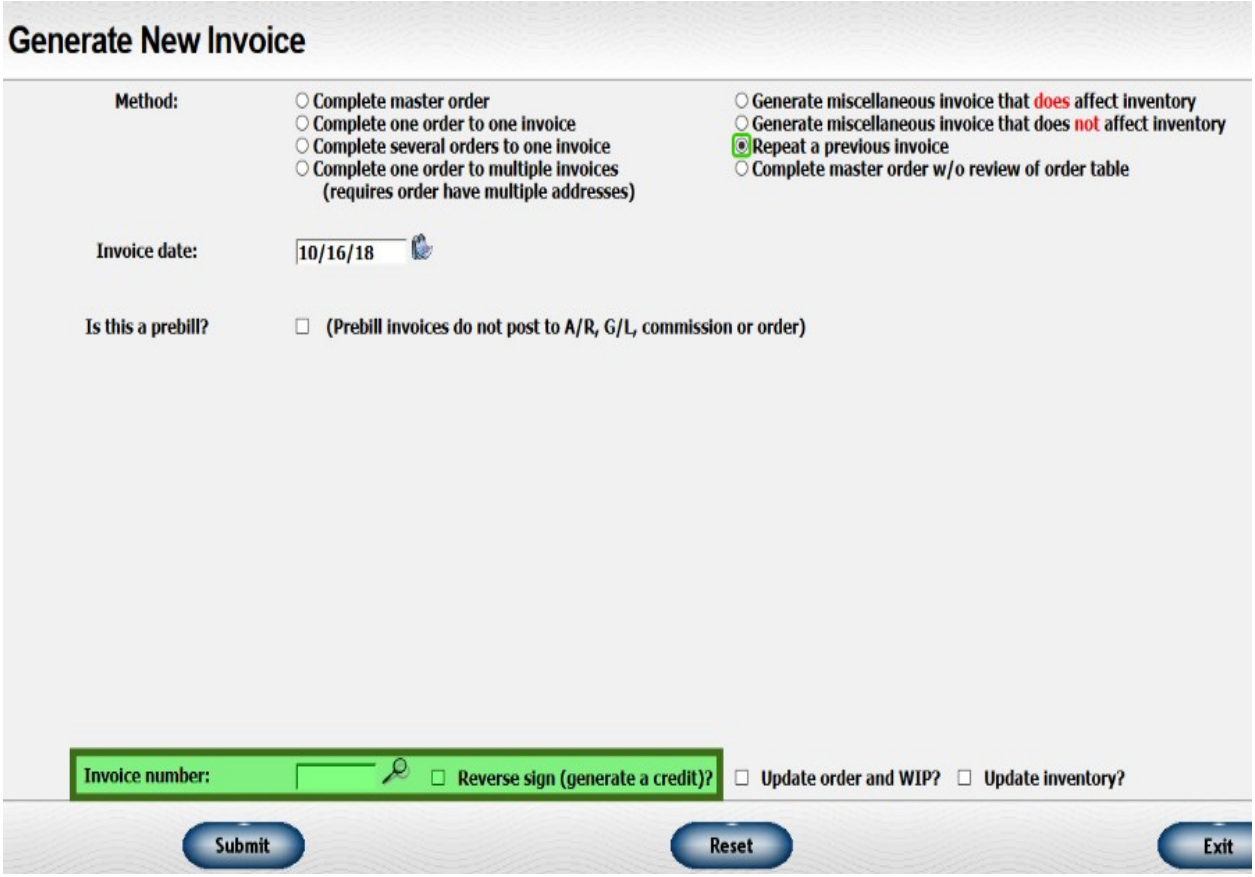

4. Click the "Submit" button. You will now be looking at the overview of the credit invoice. Click "Exit".
5. Repeat steps 1 and 2. This time, **do not** check the box for Reverse Sign.
6. Click the "Submit" button. You are now looking at the overview of a copy of the original invoice that you can go and change the tax routine. Once you make the changes print or email as needed.
7. After you close your Sales Journal, go to Accounts Receivable and apply the credit invoice against the original invoice so they cancel each other out.