

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 do not 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).

Customer: 293102 [A/R notes](#) V12

Application/Correction of A/R data French Nights

Unapplied amount: Unapplied discount: [Oldest balance](#) [Uncheck all 'apply' flags](#) [Check all 'apply' flags](#)

Apply?	Invoice #	Order #	Date	Due on	Original Amount	Already applied	Amount due	New application	Cash Discount	Disc. Date	Discount Taken	Adjustment links
<input type="checkbox"/>	SC1606		6/23/15	7/23/15	69.25		69.25			7/23/15		Credit Print
<input type="checkbox"/>	DP0098	713887	12/15/15	12/15/15	-52.62		-52.62			12/15/15		Debit Refund
<input type="checkbox"/>	DP0116	714058	1/15/16	1/15/16	-21.70		-21.70			12/15/15		Debit Refund
<input type="checkbox"/>	PY0225		1/21/16	1/21/16	-5099.00	-5097.00	-2.00			1/21/16		Debit Refund
<input type="checkbox"/>	011848	714142	3/23/16	4/22/16	246.84		246.84		4.94	4/2/16		Tax Credit
<input type="checkbox"/>	DP0130	714717	12/21/16	12/21/16	-2180.00		-2180.00			12/21/16		Debit Refund
<input type="checkbox"/>	011914	715155	1/20/17	2/19/17	105.73	100.00	5.73		2.05	1/30/17		Tax Credit
<input type="checkbox"/>	011915	715155	1/23/17	2/22/17	105.73	50.00	55.73		2.05	2/2/17		Tax Credit

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

Enter Sales Tax Correction

Correct tax routine:

0001



Louisiana/CALCASIEU/LAKE CHAR

Correct sales tax amounts:

9.10	State
4.55	County/Parish
5.69	City
1.14	Other #1
	Other #2
	Other #3
20.48	Total

Transaction date:

8/28/18

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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Generate New Invoice

Method:	<input type="radio"/> Complete master order	<input type="radio"/> Generate miscellaneous invoice that does affect inventory
	<input type="radio"/> Complete one order to one invoice	<input type="radio"/> Generate miscellaneous invoice that does not affect inventory
	<input type="radio"/> Complete several orders to one invoice	<input checked="" type="radio"/> Repeat a previous invoice
	<input type="radio"/> Complete one order to multiple invoices (requires order have multiple addresses)	<input type="radio"/> Complete master order w/o review of order table
Invoice date:	<input type="text" value="10/16/18"/>	
Is this a prebill?	<input type="checkbox"/> (Prebill invoices do not post to A/R, G/L, commission or order)	
Invoice number:	<input type="text"/>	<input type="checkbox"/> Reverse sign (generate a credit)?
		<input type="checkbox"/> Update order and WIP? <input type="checkbox"/> Update inventory?
<input type="button" value="Submit"/> <input type="button" value="Reset"/> <input type="button" value="Exit"/>		

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.