

How to Tax Exempt a Customer

There are three ways a customer can have a tax exemption.

Use the Customer's 'Exempt All Taxes' option

This option will exempt the customer from all taxes regardless of the item setup. Note that Consumption Site tax setup can override this exemption setup.

1. Open the customer record and navigate to **Customer tab | Detail tab**.
2. Check the **Exempt All Taxes** check box button.

The screenshot shows the 'Entity - ABC Reseller' form with the 'Customer' tab selected. The 'Detail' sub-tab is active. The 'Exempt All Taxes' checkbox is checked and highlighted with a red box. Other fields include Type: Company, Account No., Currency: USD, Terms: 5% 5, Net 30, Ship Via: UPS, Salesperson: Jared Smith, Bill To: ABC Reseller, Ship To: ABC Reseller, Tax No., County, and JIRA Customer.

3. **Save** the record.

Use the Customer's Tax Exemption setup

This option will exempt the customer based on the tax exemption details provided.

1. Open the customer record and navigate to **Customer tab | Taxing tab**.
2. Fill out the **Exemptions grid area**. You can be as detailed as you see necessary. Note that **Start Date** is a required detail.

The screenshot shows the 'Entity - ABC Reseller' form with the 'Customer' tab selected. The 'Taxing' sub-tab is active. The 'Exemptions' grid is highlighted with a red box. The grid has columns for Customer Location, Item No., Item Category, Tax Code, Tax Class, State, Exemption No., Partial, Start Date, and End Date. A single exemption is listed with Item No. 87G, Tax Class 70.00 %, and Start Date 6/1/2016.

- a. **Customer Location**. Use this field to define the customer location to be exempted. Click combo box button and select the location from the list. The list will display active customer locations only. If left blank, the exemption will be applied to all customer locations. This detail is optional.
 - b. **Item No**. Use this field to define the item to be exempted. Click combo box button and select the item number from the list. If left blank, the exemption will be applied to all items. This detail is optional.
 - c. **Tax Code**. Use this field to define the tax code to be exempted. Click combo box button and select the tax code from the list. If left blank, the exemption will be applied to all tax codes. This detail is optional.
 - d. **Tax Class**. Use this field to define the tax class to be exempted. Click combo box button and select the tax class from the list. If left blank, the exemption will be applied to all tax classes. This detail is optional.
 - e. **State**. Use this field to define the state to be exempted. Click combo box button and select the state from the list. If left blank, the exemption will be applied to all states. This detail is optional.
 - f. **Exemption No**. Enter a reference number/ info for the exemption. This detail is optional.
 - g. **Partial** - Enter the partial exemption percentage.
 - h. **Start Date**. Manually type the date, or click the calendar button and select from the mini-calendar. This detail is required.
 - i. **End Date**. Use this field to define the date the exemption will expire. Manually type the date, or click the calendar button and select from the mini-calendar. This detail is optional.
3. **Save** the record.

Use the Tax Exempt on Item Taxes screen.

This option will allow you to manually exempt a tax code/s applied to the item.

1. On sales transaction, click **Tax field** of line item to be exempted. This will open the **Item Taxes screen**.

	Item No.	Contract No.	Sequence	Description	Ordered	Order UOM	Shipped	UOM	Discount %	Tax	Sub Curr	Price	Total	Tax Group	Weight UOM
	<input type="checkbox"/> 87G			87 Unleaded Ga...	0.00		1.00	Gallon	0.00%	1.23	<input type="checkbox"/>	10.000000	10.00	IN SST	
	<input type="checkbox"/>				0.00		0.00		0.00%	0.00	<input type="checkbox"/>	0.000000	0.00		

2. Select the tax code/s to be exempted.
3. Click the **Exempt** button.

Item Taxes - 87G

Save Undo Close

Details

☒ Exempt ☐ Layout

<input type="checkbox"/>	Tax Group	Tax Code	Calculation Method	Rate	Qty	Price	Total	Checkoff	Tax Exempt	Exemption %	Tax Amount	Adjusted
<input type="checkbox"/>	IN SST	IN SST	Percentage	9.000000	1.00	10.00	10.00	<input type="checkbox"/>	<input type="checkbox"/>	0.00%	0.90	<input type="checkbox"/>
<input checked="" type="checkbox"/>	IN SST	% DEC	Percentage	3.330000	1.00	10.00	10.00	<input type="checkbox"/>	<input type="checkbox"/>	0.00%	0.33	<input type="checkbox"/>

4. If you are sure to apply the exemption, click **Yes** on the confirmation message. Note that this action cannot be reverted once saved.



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All selected tax codes will be set to be tax exempt. Do you want to continue?

Yes No

Notice that the **Adjusted check box button** automatically get checked.

5. Click **Save** button. You will be returned to the sales transaction where the Tax amount is already updated.

Item Taxes - 87G

Save Undo Close

Details

There are three ways a customer can have a tax exemption.

Use the 'Exempt All Taxes' option

This option will exempt the customer from all taxes regardless of the item setup. Note that Consumption Site tax setup can override this exemption setup.

1. Open the customer record and navigate to **Customer tab | Detail tab**.
2. Check the **Exempt All Taxes** check box button.

Entity - ABC Reseller

New Save Search Refresh Delete Undo Additional Close

Entity Customer Split Farm Locations Contacts Comments (0) History Attachments (0) Messages Custom Audit Log (13)

Detail Misc Pricing Taxing Grain Agrimine Patronage Applicator Help Desk Transports Commission Buyback Contracts Field xRef

Type: Company Bill To: ABC Reseller

Account No: Ship To: ABC Reseller

Currency: USD Tax No:

Terms: 5% 5, Net 30 Exempt All Taxes: ☒

Ship Via: UPS County:

Salesperson: Jared Smith IIRA Customer:

3. **Save** the record.

Use the Tax Exemption setup

This option will exempt the customer based on the tax exemption details provided.

1. Open the customer record and navigate to **Customer tab | Taxing tab**.
2. Fill out the **Exemptions grid area**. You can be as detailed as you see necessary. Note that **Start Date** is a required detail.

Entity - ABC Reseller

New Save Search Refresh Delete Undo Additional + Close

Entity Customer Split Farm Locations Contacts Comments (0) History Attachments (0) Messages Custom Audit Log (17)

Detail Misc Pricing **Taxing** Grain Agrimine Patronage Applicator Help Desk Transports Commission Buyback Contracts Field xRef

Special Taxing

X Remove Layout Filter Records (F3)

Customer Location	Vendor No.	Item No.	Item Category	Tax Group

Exemptions

X Remove Layout Filter Records (F3)

Customer Location	Item No.	Item Category	Tax Code	Tax Class	State	Exemption No.	Start Date	End Date
	87G						01/25/2016	

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- a. **Customer Location.** Use this field to define the customer location to be exempted. Click combo box button and select the location from the list. The list will display active customer locations only. If left blank, the exemption will be applied to all customer locations. This detail is optional.
 - b. **Item No.** Use this field to define the item to be exempted. Click combo box button and select the item number from the list. If left blank, the exemption will be applied to all items. This detail is optional.
 - c. **Tax Code.** Use this field to define the tax code to be exempted. Click combo box button and select the tax code from the list. If left blank, the exemption will be applied to all tax codes. This detail is optional.
 - d. **Tax Class.** Use this field to define the tax class to be exempted. Click combo box button and select the tax class from the list. If left blank, the exemption will be applied to all tax classes. This detail is optional.
 - e. **State.** Use this field to define the state to be exempted. Click combo box button and select the state from the list. If left blank, the exemption will be applied to all states. This detail is optional.
 - f. **Exemption No.** Enter a reference number/ info for the exemption. This detail is optional.
 - g. **Start Date.** Manually type the date, or click the calendar button and select from the mini-calendar. This detail is required.
 - h. **End Date.** Use this field to define the date the exemption will expire. Manually type the date, or click the calendar button and select from the mini-calendar. This detail is optional.
3. **Save** the record.

Use the Tax Exempt on Item Taxes screen

This option will allow you to manually exempt a tax code/s applied to the item.

1. On sales transaction, click **Tax field** of line item to be exempted. This will open the **Item Taxes screen**.

+ Insert 🔍 Open ✕ Remove 📖 Add Recipe 📄 Get Previous Details 🗪 Layout 🔍 Filter Records (F3)												
<input type="checkbox"/>	Item No	Contract...	Contract...	Description	UOM	Ordered	Shipped	Discount	Tax	Price	Total	Tax Gro...
☒	87G			87 Unleaded Ga...	Gallon	100.00	100.00	0.00%	14.80	1.850000	185.00	IN SST
☒						0.00	0.00	0.00%	0.00	0.000000	0.00	

2. Select the tax code/s to be exempted.
3. Click the **Exempt** button.

Item Taxes - 87G

Save Undo Close

Details

+ Insert X Exempt Layout Filter Records (F3)

Tax Group	Tax Code	Calculation Method	Rate	Qty	Price	Total	Checkoff	Tax Exempt	Tax Amount	Adjusted
IN SST	IN State Sa...	Percentage	8.000000	100.00	1.85	185.00			14.80	
IN SST	DecPerc	Percentage	3.125000	100.00	1.85	185.00			0.00	

4. If you are sure to apply the exemption, click **Yes** on the confirmation message. Note that this action cannot be reverted.



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All selected tax codes will be set to be tax exempt. Do you want to continue?

Yes

No

Notice that the **Adjusted check box button** automatically get checked.

5. Click **Save** button. You will be returned to the sales transaction where the Tax amount is already updated.

Item Taxes - 87G

Save

Undo

Close

Details