

ADDING SHIP-TO ADDRESSES AND TAX EXEMPTIONS

From the Accounts Receivable Menu

- Customers
- Add Customers

- Enter a customer number and display the record

- Select: 'Ship To' tab or button
Press <enter> to go to 'Ship To ID'
Enter an ID code (up to **6** characters)
For example, part of the county or address to identify.
Press <enter>
<Yes> to add it
Customer Name displays - press <enter>
Enter the Address, city name (NOT city ID)
Enter the State for the deliverh
Enter the Zip code (optional)
Phone, fax, contact, etc. are all optional fields
'Territory' could be changed if necessary.

- Select: 'Ship To Taxes' tab or 'Tax' button
- Click 'Authcode' - enter the county tax authority code
(ATLANT, FULTON, etc. - first 6 letters of county)

Note: There are some set up for 'energy' that begin with 'E'
Note: If selecting from the lookup, ANY line that has the correct code can be selected.

Press <enter> after entering or selecting the code and all taxes will display.

If customer is NOT exempt, skip the section below on 'Exempt Customers.'

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- **EXEMPT CUSTOMERS**

(If just adding exemptions to existing customers, after displaying the customer record, click on the 'Customer Taxes' tab or the 'Tax' button to display the taxes.)

'Tax Exem' (sales tax on Oil, Grease, Etc)
'Y' if the customer does not pay sales tax on OIL, GREASE, and other warehouse inventory items.
'N' if the customer pays sales tax.

'Ex Code' (fuel tax and sales tax on fuel)
Enter 1, 2, or 3 next to any tax the customer does not
pay. (1=Above ground tanks, 2= Licensed Distributor,
3=Government)

Note: Use the slide bar to display more tax codes.

*!!Exemption codes must be added to both the 'Customer Tax' screen
and the 'Ship To' Tax screen. Enter EXEMPTION CODES TO THE
CUSTOMER TAX SCREEN BEFORE ADDING SHIP-TO ADDRESSES AND THE
EXEMPTION CODES WILL BE BROUGHT FORWARD.!!*

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- If customer has multiple Ship To addresses, click 'Ship To' tab or button and the screen is set up for another ship to record.

OTHER INFORMATION

If the customer has an out of state billing address AND only ONE ship-to in Georgia, after setting up the Ship-To record and taxes, go back to the 'Customer' screen by clicking on the 'Customer' tab.

Look for a field called 'Ship To' (right above 'territory'). This is a DEFAULT ship-to code. Enter the ship-to code you set up for this customer (or select from the lookup).

This feature will AUTOMATICALLY pull the ship-to address into EVERY invoice entered for this customer.

Note - this is ONLY for customers with ONE shipping address. If there are multiple ship-to records, the operator will be able to select from the list for the customer when entering the invoice.