# FUEL TAX EXEMPTIONS

### Description

The Fuel Tax Exemptions are codes that when attached to a tax code in a customer's tax authority, will exempt them from that tax.  The exemption defines the reason the company is exempt from the tax.  For example, code 1 could be Off Road, 2 could be Permit Holders/Bonded, 3 Municipalities (Government entities), etc.  The exemption codes should match the various exemption categories which are reported on fuel tax return forms.  The same code can be used for both Federal and State taxes.  If a customer is exempt from several taxes for the same reason (Bonded, for example), the same exemption code may be used for all exempt taxes.  It is not necessary to set up separate exemption codes for Federal and State taxes.

### How They Are Used

On the taxes screen of a customer record in Accounts Receivable, Customer File, all fuel taxes which apply to the customer are displayed.  Next to each tax description is a 'Ex Code' column.  If the customer is exempt from the tax, an exemption code number will display with it's description.  When a taxed item is sold on an invoice, the taxes display in the tax box.  If there is no exemption code, the tax is calculated and displayed in the box and charged on the invoice.  If there is an exemption code, the tax will not be calculated or charged.  If the customer is exempt sometimes and not other times, the tax exemption code may be added or removed when the invoice is entered.  The change will be on the invoice only and does not affect future invoices for the customer.

### Menu Select
From the Master File Maintenance submenu, select   - *Fuel Tax Exemptions.*
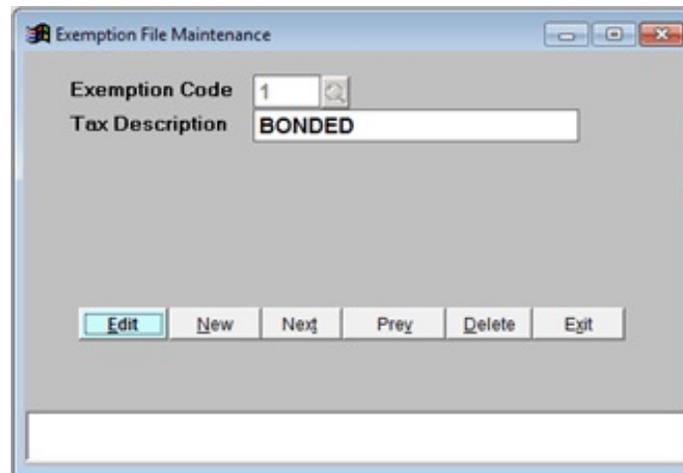
Add Change Delete Exemptions

Exemption Report

Quit

## ADD CHANGE DELETE EXEMPTIONS

### Menu Select
From the Fuel Tax Exemptions submenu, select  - *Add Change Delete Exemptions.*



### Exemption Code.
Exemption codes are numeric and must begin with 1.  Enter a new exemption code number or click the magnifying glass or F2 to lookup.

### Tax Description.
Type a short but accurate description of the exemption.  This description will print on Fuel Tax Sales Audit reports for exempt sales.

## OPTION BUTTONS.          Click on the button or press the underlined letter.

<Edit> Click on the description field and change it.  Or press E or click the Edit button.

<New> Click on New to enter another record.

<Next> Click on Next to display the next record.

<Prev> Click on Previous to display the previous record.

<Delete> Click to Delete to delete this record.  A popup box with '*Do You Want to Delete This Record?* displays.  Click the Y button to delete the record or the N button to proceed without deleting.

<Exit> Click on Exit to quit file maintenance.

# EXEMPTION REPORT

The Exemption Report is a list of all exemption codes in the file.

## Menu Select:

From the Master File Maintenance Submenu, select  - Fuel Tax Exemptions.
From the Fuel Tax Exemptions submenu, select  - *Exemption Report*.

## Enter  Report Options:

*Output to:        S=Screen        P=Printer        F=Text File        Q=Quit*

## Enter The Date.

The current system date displays.  Press *enter* to accept the date or enter a report date.
This date has no affect on the report.

## Is Everything Ok? (Y/N/P=Printer/Q=Quit).

Y - print the report using the selected printer or screen.
P - change to a different printer or print option,.
N or Q - quit without printing.

```
Date: 07/06/2007              Demo Company                   Page No.
Time: 17:04:00          Exemption File  Report 07/06/2007        1


  Tax Code  Description

  1         SIGNED STATEMENT/AG/DD
  2         BONDED/PERMIT
  3         PUBLIC SCHOOLS
  4         FEDERAL GOVERNMENT
  5         RAILROAD
  6         CO-OPS
  7         OFF-ROAD - NO TAX NUMBER
```

*Sample Fuel Tax Exemption Report*