

Acumens e-Tax (Enterprise)

All versions: MS Dynamics NAV & BC

Prepared & Developed by

SBC Dynamics ERP

Document History

Revision History:

VERSION	DATE	SECTIONS REVISED	DESCRIPTION
1.0	03-08-2024		Document Prepared
2.0	09-19-2024		Added Extended Taxability
4.0	10-28-2024		Added: Multi-company Nexus Ship-to Address Exemption Renamed: Hawaii Mixed Taxability Hawaii Wholesale Wholesale Mixed Taxability

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ACUMENS E-TAX (ENTERPRISE)

Acumens e-Tax (Enterprise) app extends standard Business Central Sales Tax functionality by introducing address specific sales tax which is fetched from external API's based on a validated address and customizations for special taxes.

Sales Tax APIs available are:

1. TaxJar – Provides sales tax rates, tax filing services and product taxability data.
Users have the option to use Acumens e-Tax reporting to manually file returns if they do not want to use the tax filing service offered by TaxJar
2. Zip Tax – Provides sales tax rates, service taxability data but no filing services
Users can use Acumens e-Tax reporting to manually file returns with the state.
3. US Geocoder – Provide rates but no filing services.
Users can use Acumens e-Tax reporting to manually file returns with the state.

The following address verification APIs are supported:

1. UPS.com
2. Smarty.com

Features included in this app are below:

- Shipping address change management for Sales Tax Calculation and Released Documents
 - Ship-to Code
 - Ship-to Address
 - Ship-to City
 - Ship-to County
 - Ship-to Country
 - Ship-to Zip Code
 - Posting Date
- Exemptions
 - Bill-to customer
 - Sell-to customer
 - Ship-to Address
- Multi-company Nexus
- Hawaii Labor Exemptions
- Reseller Use Tax
- Hawaii Reseller Exemption
- California Farmers
- Destination based and Origin based Sales Tax calculation
- Retread Tax
- Credit Sales Tax
- Override Tax Rate
- Exact Tax Reversing
- Freight Tax

- Service Tax
- Extended Taxability
- Sales Tax Activity Log for Posted Documents
- Sales Tax Reporting
 - Report
 - Report Log
 - Tax Override in Documents
 - Tax Rates Updates
 - Update address in Posted documents to trigger posting recreation of Posted Sales Tax Report Entries.

1. Sales Tax Calculation Triggers.

Sales Tax Calculation is based on ship-to address and a change to these fields will trigger a recalculation of sales tax. If the document is open and any ship-to address field is changed, Sales Tax will need to be recalculated.

The screenshot displays the Dynamics 365 Business Central interface for a sales order. The main form is titled '1017 · The Cannon Group PLC' and is under the 'Acumens eSalesTax & Address Verify' section. The form is divided into two main parts: 'Acumens eSalesTax & Address Verify' and 'Shipping and Billing'.

Acumens eSalesTax & Address Verify Section:

- Ship-to Address Verif...**: Toggle switch (off).
- Zip+4 Address Updat...**: Toggle switch (off).
- Tax Liable**: Toggle switch (on).
- Tax Area Code**: Dropdown menu showing 'T0059'.
- Shipping Taxable**: Toggle switch (off).
- Charge Use Tax**: Toggle switch (off).
- Market Place**: Dropdown menu.
- Exemption Customer**: Dropdown menu showing 'Sell-to'.
- Tax Exemption Type**: Dropdown menu.
- Sales Tax Calculated**: Toggle switch (on, highlighted with a red box).
- Sales Tax Errors**: Field showing '0'.
- Sales Tax %**: Field showing '7.25'.
- Report to City**: Dropdown menu showing '0001'.
- Report to County**: Dropdown menu showing '0001'.

Shipping and Billing Section:

- Ship-to**: Dropdown menu showing 'Custom Address'.
- Code**: Field (highlighted with a red box).
- Name**: Field showing 'The Cannon Group PLC'.
- Address**: Field showing '120 E Buell St'.
- Address 2**: Field.
- City**: Field showing 'Montague'.
- State**: Field showing 'CA'.
- ZIP Code**: Field showing '96064-8000'.
- Country/Region**: Dropdown menu showing 'US'.
- Contact**: Field showing 'Mr. Andy Teal'.
- Shipment Method**: Field showing 'EXW'.
- Bill-to**: Dropdown menu showing 'Default (Customer)'.
- Location Code**: Dropdown menu showing 'CA'.
- Shipment Date**: Field showing '1/23/2025'.
- Shipping Advice**: Dropdown menu showing 'Partial'.
- Outbound Whse. Han...**: Field.
- Shipping Time**: Field showing '1D'.
- Late Order Shipping**: Field showing 'Yes'.
- Combine Shipments**: Toggle switch (on).
- Completely Shipped**: Field showing 'No'.

Left Panel (USGeocoder):

No.	Sell-to Customer No.
1001	10000
1002	10000
101005	30000
101009	38128456
101011	43687129
101013	46897889
101015	49633663
101016	10000
101017	20000
101018	01454545
101019	319879
101020	32789456
101022	38128456
101023	30000
104001	10000
104002	20000
104003	30000
104004	40000
104005	60000
104006	10000
104007	20000
104008	30000
104009	40000
104010	60000
104011	10000

Right Panel (Attachments):

Attachments (0)
275,634.92
0.00
9,764.50
686.67
0.00
8.51
0.00
69.68
221,721.19
0.00
1/12/2025
286,164.28
0.00
44,891.48
0.00
10000
The Cannon Group PLC

Dynamics 365 Business Central

USGeocoder Setup Sales Orders: All Search

Sales Order | Work Date: 1/23/2025

1017 · The Cannon Group PLC

Home Prepare Print/Send Request Approval Order Report Acumens eSalesTax & Address Verify

Acumens eSalesTax & Address Verify

Ship-to Address Verif... ☐ Exemption Customer

Zip+4 Address Updat... ☐ Tax Exemption Type

Tax Liab... ☒ Sales Tax Calculated ☒

Tax Area Code Sales Tax Errors

Shipping Taxable ☐ Sales Tax %

Charge Use Tax ☐ Report to City

Market Place Report to County

Shipping and Billing

Ship-to Bill-to

Code Location Code

Name Shipment Date

Address Shipping Advice

Address 2

City Outbound Whse. Han...

State Shipping Time

ZIP Code Late Order Shipping

Country/Region

Contact Combine Shipments ☒

Shipment Method

Code Completely Shipped

If the document is released, change to ship-to address will not be allowed.

Dynamics 365 Business Central

Sales Order | Work Date: 1/23/2025

1017 · The Cannon Group PLC

Home Prepare Print/Send Request Approval Order Report Acumens eSalesTax & Address Verify Actions Related Fewer options

Validate ship to Address Validate sell to Address Validate bill to Address Calculate SalesTax Exemptions Statistics Reset SalesTax Override Tax Rate API Log

No. Due Date

Customer Name Requested Delivery Date

Contact External Document No.

Posting Date Status

Order Date

Acumens eSalesTax & Address Verify

Ship-to Address Verified ☐ Exemption Customer

Zip+4 Address Updated ☐ Tax Exemption Type

Tax Liab... ☒ Sales Tax Calculated ☒

Tax Area Code Sales Tax Errors

Shipping Taxable ☐ Sales Tax %

Charge Use Tax ☐ Report to City

Market Place Report to County

Shipping and Billing

Ship-to Bill-to

Code

Name Location Code

Address Shipment Date

Address 2

Shipping Advice

Outbound Whse. Handling Time



Sales Order | Work Date: 1/23/2025



Not saved



1017 - The Cannon Group PLC

Home Prepare Print/Send Request Approval Order Report Acumens eSalesTax & Address Verify Actions Related Fewer options

Validate ship to Address Validate sell to Address Validate bill to Address Calculate SalesTax Exemptions Statistics Reset SalesTax Override Tax Rate API Log

The page has an error. [Refresh \(F5\)](#) to undo the change, or correct the error.

General

Show more

No.	1017	Due Date	3/23/2025
Customer Name	The Cannon Group PLC	Requested Delivery Date	
Contact	Mr. Andy Teal	External Document No.	
Posting Date	2/23/2025	Status	Released
Order Date	1/23/2025		

Acumens eSalesTax & Address Verify

Yes T0066

Shipping and Billing

Show less

Ship-to	Alternate Shipping Address	Bill-to	Default (Customer)
Code	Validation Results The order status must be open to modify this field	Location Code	CA
Name		Shipment Date	1/23/2025
Address	120 E Buell St	Shipping Advice	Partial
Address 2		Outbound Whse. Handling Time	
City	Montague	Shipping Time	1D
State	CA	Late Order Shipping	Yes
ZIP Code	96064-8000	Combine Shipments	<input type="checkbox"/>
Country/Region	US	Completely Shipped	No
Contact	Mr. Andy Teal		

Shipment Method

2. Customer Exemptions

Sales Tax exemptions can be based on Customer Bill-to or Sell-to or Ship-to Address. Sell-to takes precedence over Bill-to

Sell-to Exemption

Dynamics 365 Business Central

Environment: Sandbox - 25

Customer Card

01121212 · Spotsmeyer's Furnishings

Home Request Approval New Document Prices & Discounts Customer Report Acumens eMailing Acumens Customer Portal Acumens e-Tax Actions Related Reports Automate Fewer options

Verify Address Exemptions

General

No.	01121212	Salesperson Code	JQ
Name	Spotsmeyer's Furnishings	Responsibility Center	
IC Partner Code		Document Sending Profile	
Balance (\$)	2,898.98	Total Sales - Fiscal Year	2,820.80
Balance (LCY) As Vendor	0.00	Costs (LCY)	2,200.20
Balance Due (\$)	0.00	Profit (LCY)	620.60
Credit Limit (\$)	0.00	Profit %	22.0
Blocked		Last Date Modified	10/15/2024
Privacy Blocked	<input checked="" type="checkbox"/>	Disable Search by Name	<input checked="" type="checkbox"/>

Acumens e-Tax

Tax Registration No.		Mixed Taxability	<input checked="" type="checkbox"/>
Tax Liable	<input checked="" type="checkbox"/>	Farmers	<input checked="" type="checkbox"/>
Tax Identification Type	Legal Entity	National Account	<input checked="" type="checkbox"/>
Tax Exemption No.		Allow Tax Rate Override	<input checked="" type="checkbox"/>
Market Place			

Dynamics 365 Business Central

Enrollment: Sandford/025

Exemption States and Documents

+ New Edit List Delete

Cre... in Taxlar	Mark for Del...	Customer No. 1	Exemption State 1	Ship-to Code	Tax Exemption Type	Document Category	Document No.	Document Title	Issued By	Issued Date	Expiration Date	URL	Name
→		00121212	SA		WHOLESALE								Spotsmeyer's Fu

Dynamics 365 Business Central | Environment: sandbox1C25

Sales Order
S-ORD101031 · Spotsmeyer's Furnishings

Home | Prepare | Print/Send | Request Approval | Order | Report | Acumens eMailing | Acumens Customer Portal | **Acumens e-Tax** | Actions | Related | Automate | Fewer options

Validate ship to Address | Validate sell to Address | Validate bill to Address | Calculate SalesTax | Exemptions | Reset SalesTax | Override Tax Rate | API Log | Statistics

General > | 10/15/2024 | 10/15/2024 | 10/15/2024 | 10/31/2024 | Open

Acumens e-Tax | Show more

Ship-to Address Verified	<input type="checkbox"/>	Tax Exemption Type	WHOLESALE
Zip+4 Address Updated	<input type="checkbox"/>	Sales Tax Calculated	<input checked="" type="checkbox"/>
Tax Liable	<input type="checkbox"/>	Sales Tax Errors	0
Tax Area Code	T0067	Sales Tax %	10.25
Shipping Taxable	<input type="checkbox"/>	Report to City	0002
Charge Use Tax	<input type="checkbox"/>	Report to County	0002
Market Place			

Shipping and Billing | Show less

Ship-to	Custom Address	Bill-to	Default (Customer)
Code		Location Code	CA
Name	Spotsmeyer's Furnishings	Shipment Date	10/15/2024
Address	120 E Monterey Ave	Shipping Advice	Partial
Address 2		Outbound Whse. Handling Time	
City	Pomona	Shipping Time	
Ship-to State	CA	Late Order Shipping	Yes
Post Code	91767-5420	Combine Shipments	<input checked="" type="checkbox"/>
Country/Region	US	Completely Shipped	No

Bill-to Exemption

Dynamics 365 Business Central | Environment: sandbox1C25

Customer Card
01445544 · Progressive Home Furnishings

Home | Request Approval | New Document | Prices & Discounts | Customer | Report | Acumens eMailing | Acumens Customer Portal | **Acumens e-Tax** | Actions | Related | Reports | Automate | Fewer options

Verify Address | **Exemptions**

General > | Progressive Home Furnishings

Acumens e-Tax

Tax Registration No.		Mixed Taxability	<input type="checkbox"/>
Tax Liable	<input type="checkbox"/>	Farmers	<input type="checkbox"/>
Tax Identification Type	Legal Entity	National Account	<input type="checkbox"/>
Tax Exemption No.		Allow Tax Rate Override	<input type="checkbox"/>
Market Place			

Address & Contact | 94553 | Mr. Scott Mitchell

Invoicing | Show less

Bill-to Customer	01121212	Posting Details	
GLN		Gen. Bus. Posting Group	DOMESTIC
Use GLN in Electronic Documents	<input type="checkbox"/>	Customer Posting Group	DOMESTIC
Copy Sell-to Addr. to Qte From	Company	Prices and Discounts	
Tax Area Code	*	Currency Code	
Registration No.		Customer Price Group	
		Customer Disc. Group	
		Allow Line Disc.	<input checked="" type="checkbox"/>
		Invoice Disc. Code	01445544

Dynamics 365 Business Central

Environment: SandboxC25

Exemption States and Documents

+ New Edit List Delete

Cre... in TaxJar	Mark for Del...	Customer No.	Exemption State T	Ship-to Code	Tax Exemption Type	Document Category	Document No.	Document Title	Issued By	Issued Date	Expiration Date	URL	Name
		01121212	CA		WHOLESALE								Spotsmeyer's F...

Dynamics 365 Business Central

Environment: SandboxC25

Sales Order

S-ORD101032 · Progressive Home Furnishings

Home Prepare Print/Send Request Approval Order Report Acumens eMailing Acumens Customer Portal Acumens e-Tax Actions Related Automate Fewer options

Validate ship to Address Validate sell to Address Validate bill to Address Calculate SalesTax Exemptions Reset SalesTax Override Tax Rate API Log Statistics

Acumens e-Tax

Ship-to Address Verified ☐

Zip +4 Address Updated ☐

Tax Liabile ☐

Tax Area Code T0068

Shipping Taxable ☐

Charge Use Tax ☐

Market Place

Tax Exemption Type WHOLESALE

Sales Tax Calculated ☒

Sales Tax Errors 0

Sales Tax % 8.75

Report to City 0003

Report to County 0003

Shipping and Billing

Ship-to Custom Address

Code

Name Progressive Home Furnishings

Address 120 Hampton Rd

Address 2

City Martinez

Ship-to State CA

Post Code 94553-9749

Country/Region US

Phone No.

Contact Mr. Scott Mitchell

Bill-to Another Customer

Name Spotsmeyer's Furnishings

Address 120 E Monterey Ave

Address 2

City Pomona

Bill-to State CA

Post Code 91767

Country/Region Code US

Contact No. CT000025

Contact Mr. Mike Nash

Phone No.

Ship-to Address:

Exemption:

Dynamics 365 Business Central

Environment: SandboxC25

Customer Card

10000 · The Cannon Gro

Home Request Approval New Document

Verify Address Exemptions

Exemption States and Documents

+ New Edit List Delete

Cre... in TaxJar	Mark for Del...	Customer No.	Exemption State T	Ship-to Code	Tax Exemption Type	Document Category	Document No.	Document T
		10000	CA	EXEMPT	WHOLESALE			

Sales Order with Ship-to Code blank, no exemption applied:

Dynamics 365 Business Central

Sales Order

S-ORD101046 · The Cannon Group PLC

Home Prepare Print/Send Request Approval Order Report Acumens eMailing Acumens Customer Portal **Acumens e-Tax** Actions Related Automate Fewer options

Validate ship to Address Validate sell to Address Validate bill to Address Calculate SalesTax Exemptions Reset SalesTax Override Tax Rate API Log Statistics

Acumens e-Tax

Ship-to Address Verified ☐ Zip+4 Address Updated ☐ Tax Liable ☒ Tax Area Code T0140 Shipping Taxable ☐ Charge Use Tax ☐ Market Place

Tax Exemption Type Sales Tax Calculated ☒ Sales Tax Errors 0 Sales Tax % 9.0 Report to City 0001 Report to County 0001

Shipping and Billing

Ship-to Custom Address Code Name The Cannon Group PLC Address 1099 38th Ave Address 2 City Santa Cruz Ship-to State CA Post Code 95062-4427 Country/Region US Phone No. Contact Mr. Andy Teal

Bill-to Default (Customer) Location Code CA Shipment Date 10/22/2024 Shipping Advice Partial Outbound Whse. Handling Time Shipping Time 1D Late Order Shipping Yes Combine Shipments Completely Shipped No

Sales Order with Ship-to Code as "EXEMPT", exemption is applied

Dynamics 365 Business Central

Sales Order

S-ORD101047 · The Cannon Group PLC

Home Prepare Print/Send Request Approval Order Report Acumens eMailing Acumens Customer Portal **Acumens e-Tax** Actions Related Automate Fewer options

Validate ship to Address Validate sell to Address Validate bill to Address Calculate SalesTax Exemptions Reset SalesTax Override Tax Rate API Log Statistics

Acumens e-Tax

Ship-to Address Verified ☐ Zip+4 Address Updated ☐ Tax Liable ☐ Tax Area Code T0143 Shipping Taxable ☐ Charge Use Tax ☐ Market Place

Tax Exemption Type WHOLESALE Sales Tax Calculated ☒ Sales Tax Errors 0 Sales Tax % 9.5 Report to City 0017 Report to County 0002

Shipping and Billing

Ship-to Alternate Shipping Address Code EXEMPT Name The Cannon Group PLC Address 6166 Hillandale Dr Address 2 City Los Angeles Ship-to State CA Post Code 90042-1330 Country/Region US Phone No. Contact Mr. Andy Teal

Bill-to Default (Customer) Location Code CA Shipment Date 10/22/2024 Shipping Advice Partial Outbound Whse. Handling Time Shipping Time 1D Late Order Shipping Yes Combine Shipments Completely Shipped No

Document was last saved: just now








3. Multi-Company Nexus

While running multiple companies within one company in Business Central, each company tax liability can differ per Nexus State.

To handle this, multi-company nexus introduces a feature where you can use Location, Global Dimension 1 and Global Dimension 2 to separate the companies tax liability.

Example Location:

Limited to Ship-from Location NY1:

 Nexus States Card     ✓ Saved  

NY · New York

General

State Code	<input type="text" value="NY"/>	Service Taxable	<input type="checkbox"/>
State Name	<input type="text" value="New York"/>	Split Nexus	<input type="text" value="NYSPLITNEX"/>
Outside State Code	<input type="text" value="NYOUT"/>	Location Code	<input type="text" value="NY1"/>
Sales Tax Calculation ...	<input type="text" value="Destination-based"/>	Department Code	<input type="text"/>
Created in Tax Jar	<input checked="" type="checkbox"/>	Customergroup Code	<input type="text"/>
Shipping Taxable	<input type="checkbox"/>		

Sales Order with ship-from Location NY1 - Taxable:

Dynamics 365 Business Central | Environment: SandboxBC25

Sales Order
S-ORD101048 · New York Customer

Home Prepare Print/Send Request Approval Order Report Acumens eMailing Acumens Customer Portal **Acumens e-Tax** Actions Related Automate Fewer options

Validate ship to Address Validate sell to Address Validate bill to Address Calculate SalesTax Exemptions Reset SalesTax Override Tax Rate API Log Statistics

Shipping and Billing Show more

Ship-to: Custom Address Bill-to: Default (Customer)
Code: Location Code: **NY1**
Name: New York Customer Shipment Date: 10/22/2024
Address: 5 Frost Pond Dr
Address 2:
City: Roslyn
Ship-to State: NY
Post Code: 11576-2807
Phone No.:
Contact:

Lines Manage Line Order

New Line Delete Line Service Commitments Select Items...

Type	No.	Item Reference No.	Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code	Unit Price Excl. Tax	Tax Area Code	Charge Use Tax	Invoice Line No.
Item	1896-S		ATHENS Desk	NY1	1			PCS	1,000.80	T0146	<input type="checkbox"/>	0

Subtotal Excl. Tax (USD) 1,000.80 Total Excl. Tax (USD) 1,000.80
Inv. Discount Amount Excl. Tax (USD) 0.00 Total Tax (USD) **86.32**

Sales Order with ship-from Location NY2 - Nontaxable:

Dynamics 365 Business Central | Environment: SandboxBC25

Sales Order
S-ORD101050 · New York Customer

Home Prepare Print/Send Request Approval Order Report Acumens eMailing Acumens Customer Portal **Acumens e-Tax** Actions Related Automate Fewer options

Validate ship to Address Validate sell to Address Validate bill to Address Calculate SalesTax Exemptions Reset SalesTax Override Tax Rate API Log Statistics

Shipping and Billing Show more

Ship-to: Custom Address Bill-to: Default (Customer)
Code: Location Code: **NY2**
Name: New York Customer Shipment Date: 10/22/2024
Address: 5 Frost Pond Dr
Address 2:
City: Roslyn
Ship-to State: NY
Post Code: 11576-2807
Phone No.:
Contact:

Lines Manage Line Order

New Line Delete Line Service Commitments Select Items...

Type	No.	Item Reference No.	Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code	Unit Price Excl. Tax	Tax Area Code	Charge Use Tax	Invoice Line No.
Item	1900-S		PARIS Guest Chair, black		1			PCS	192.80	NYSPLITNEX	<input type="checkbox"/>	0

Subtotal Excl. Tax (USD) 192.80 Total Excl. Tax (USD) 192.80
Inv. Discount Amount Excl. Tax (USD) 0.00 Total Tax (USD) **0.00**

Note: This feature is not supported by TaxJar.

4. Hawaii Labor Exemptions

Labor is Taxable in Hawaii regardless of customer exemption e.g. Government Exempt
Customers will not pay tax for Items but will pay tax for Labor.

Dynamics 365 Business Central

Sales Order

S-ORD101053 · New Concepts Furniture

Home Prepare Print/Send Request Approval Order Report Acumens eMailing Acumens Customer Portal Acumens e-Tax Actions Related Automate Fewer options

Post... Release... Create Warehouse Shipment Create Inventory Put-away/Pick... Archive Document

Acumens e-Tax

Ship-to Address Verified ☐ Tax Exemption Type ☐ Sales Tax Calculated ☐ Sales Tax Errors 0 Sales Tax % 0.0 Report to City Report to County

Zip+4 Address Updated ☐ Tax Liable ☐ Tax Area Code Shipping Taxable ☐ Charge Use Tax ☐ Market Place

Shipping and Billing > 10/22/2024

Lines Manage Line Order

New Line Delete Line Service Commitments Select items...

Type	Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code	Unit Price Excl. Tax	Tax Area Code	Charge Use Tax	Invoice Line No.	Tax Group Code	Line Discount %
Item	PARIS Guest Chair, black	HI	1			PCS	192.80		<input type="checkbox"/>	0	FURNITURE	
Resource	Marty Horst	HI	1			HOUR	139.00		<input type="checkbox"/>	0	LABOR	

Subtotal Excl. Tax (USD) 331.80 Total Excl. Tax (USD) 331.80
Inv. Discount Amount Excl. Tax (USD) 0.00 Total Tax (USD) 0.00

Dynamics 365 Business Central

Sales Order

S-ORD101053 · New Concepts Furniture

Home Prepare Print/Send Request Approval Order Report Acumens eMailing Acumens Customer Portal Acumens e-Tax Actions Related Automate Fewer options

Validate ship to Address Validate sell to Address Validate bill to Address Calculate SalesTax Exemptions Reset SalesTax Override Tax Rate API Log Statistics

General > 10/22/2024 10/22/2024 10/22/2024 11/5/2024 Open

Acumens e-Tax

Ship-to Address Verified ☐ Tax Exemption Type ☒ GOVERNMENT Sales Tax Calculated ☒ Sales Tax Errors 0 Sales Tax % 4.712 Report to City 0007 Report to County 0006

Zip+4 Address Updated ☐ Tax Liable ☒ Tax Area Code T0160 Shipping Taxable ☐ Charge Use Tax ☐ Market Place

Shipping and Billing > 10/22/2024

Lines Manage Line Order

New Line Delete Line Service Commitments Select items...

Type	Description	Location Code	Quantity	Unit of Measure Code	Unit Price Excl. Tax	Tax Area Code	Charge Use Tax	Invoice Line No.	Tax Group Code	Line Discount %	Line Amount Excl. Tax	Amount Including Tax	Co
Item	PARIS Guest Chair, black	HI	1	PCS	192.80	T0160	<input type="checkbox"/>	0	G-ZUSETAX		192.80	192.80	
Resource	Marty Horst	HI	1	HOUR	139.00	T0160	<input checked="" type="checkbox"/>	0	LABOR		139.00	145.55	

Note: This feature is not supported by TaxJar.

5. Reseller Use Tax

This allows user to post tax for internally used items but not tax resale items.

Dynamics 365 Business Central

Sales Order | Work Date: 1/23/2025

1021 · Spotsmeyer's Furnishings

Home Prepare Print/Send Request Approval Order Report **Acumens eSalesTax & Address Verify** Actions Related Fewer options

Validate ship to Address Validate sell to Address Validate bill to Address Calculate SalesTax Exemptions Statistics Reset SalesTax Override Tax Rate API Log

Tax Liab... ☐ Sales Tax Calculated ☒
Tax Area Code Tax Area Code Sales Tax Errors 0
Shipping Taxable Shipping Taxable Sales Tax % 10.25
Charge Use Tax Charge Use Tax Report to City 0004
Market Place Market Place Report to County 0004

Shipping and Billing > New Concepts Furniture 1/23/2025

Lines Manage Line Order

New Line Delete Line Select Items...

Type	Reserved Quantity	Unit of Measure Code	Unit Price Excl. Tax	Tax Area Code	Cha... Sales Tax	Invoice Line No.	Tax Group Code	Line Discount %	Line Amount Excl. Tax	Amount Including Tax	Qty. to Ship	Quantity Shipped	Qty. to Invoice
Item		PCS	4,000.00		<input type="checkbox"/>	0	SUPPLIES		4,000.00	4,000.00	1		1
→ Item		PCS	4,000.00		<input checked="" type="checkbox"/>	0	SUPPLIES	10	3,600.00	3,600.00	1		1
Item		PCS	647.80		<input type="checkbox"/>	0	FURNITURE		647.80	647.80	1		1

Subtotal Excl. Tax (USD) 8,247.80 Total Excl. Tax (USD) 8,247.80
Inv. Discount Amount Excl. Tax (USD) 0.00 Total Tax (USD) 0.00
Invoice Discount % 0 Total Incl. Tax (USD) 8,247.80

Dynamics 365 Business Central

Sales Order | Work Date: 1/23/2025

1021 · Spotsmeyer's Fur

Home Prepare Print/Send Request Approval Order Report **Acumens eSalesTax & Address Verify** Actions Related Fewer options

Validate ship to Address Validate sell to Address Validate bill to Address Calculate SalesTax Exemptions Statistics Reset SalesTax Override Tax Rate API Log

Shipping and Billing > New Concepts Furniture 1/23/2025

Exemption States and Documents | Work Date: 1/23/2025

Search + New Edit List Delete

Cre... in Taxat	Mark for Del...	Customer No.	Exemption State	Tax Exemption Type	Document Category	Document No.	Document Title
→	<input type="checkbox"/>	01121212	CA	WHOLESALES			

Dynamics 365 Business Central
Sales Order | Work Date: 1/23/2025
1021 · Spotsmeyer's Furnishings

Home
Prepare
Print/Send
Request Approval
Order
Report
Acumens eSalesTax & Address Verify
Actions
Related
Fewer options

Validate ship to Address
Validate sell to Address
Validate bill to Address
Calculate SalesTax
Exemptions
Statistics
Reset SalesTax
Override Tax Rate
API Log

General
1/23/2025
1/23/2025
2/6/2025
Open

Acumens eSalesTax & Address Verify
Show more

Ship-to Address Verified
Zip+4 Address Updated
Tax Liable
Tax Area Code
Shipping Taxable
Charge Use Tax
Market Place

Exemption Customer
Tax Exemption Type
Sales Tax Calculated
Sales Tax Errors
Sales Tax %
Report to City
Report to County

Shipping and Billing
New Concepts Furniture
1/23/2025

Lines
Manage
Line
Order

New Line
Delete Line
Select items...

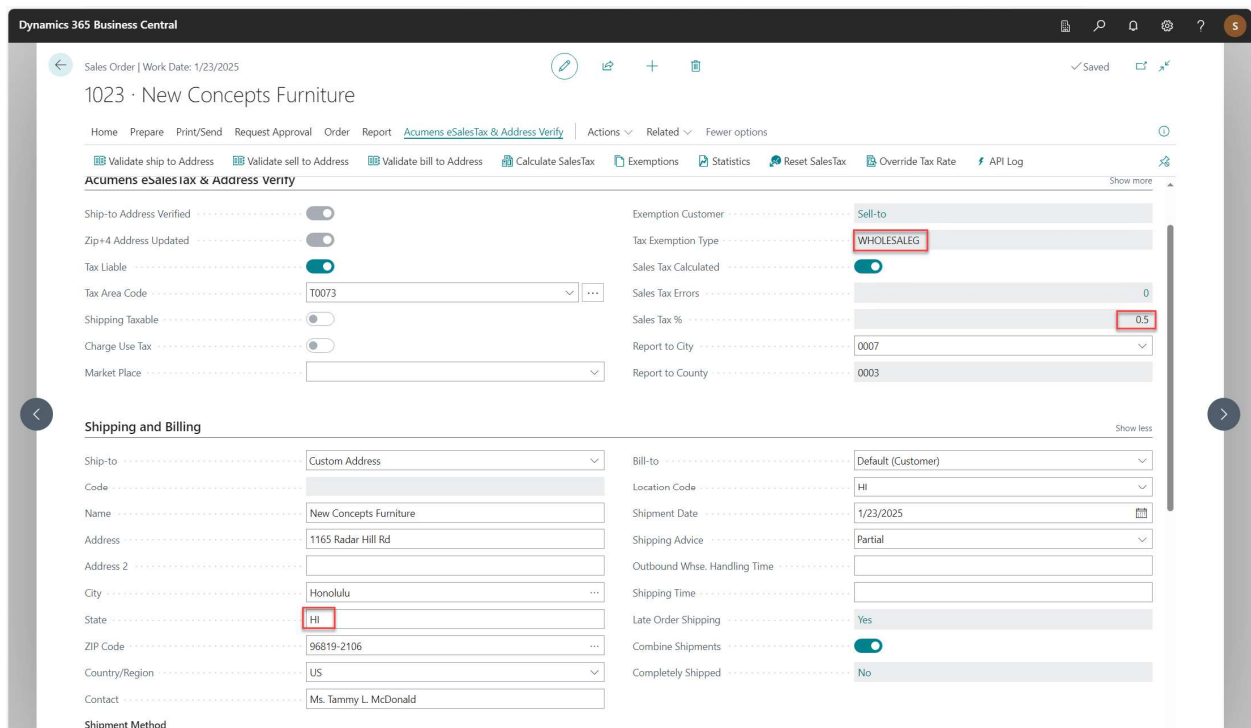
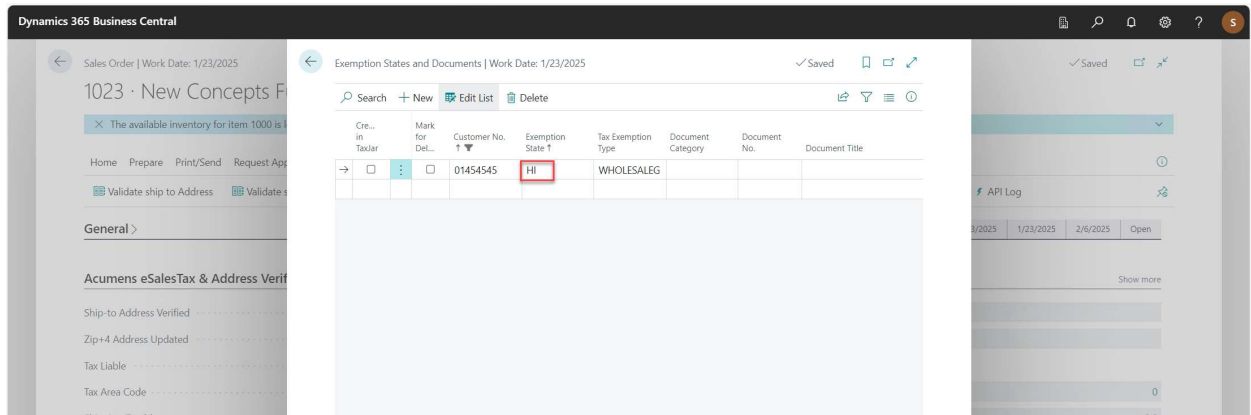
Type	Unit of Measure Code	Unit Price Excl. Tax	Tax Area Code	Cha... Sales Tax	Invoice Line No.	Tax Group Code	Line Discount %	Line Amount Excl. Tax	Amount Including Tax	Qty. to Ship	Quantity Shipped	Qty. to Invoice	Quantity Invoiced
Item	PCS	4,000.00	T0072	<input type="checkbox"/>	0	G-ZUSETAX		4,000.00	4,000.00	1		1	
→ Item	PCS	4,000.00	T0072	<input checked="" type="checkbox"/>	0	SUPPLIES	10	3,600.00	3,969.00	1		1	
Item	PCS	647.80	T0072	<input type="checkbox"/>	0	G-ZUSETAX		647.80	647.80	1		1	

Note:

This feature is not supported by TaxJar.

6. Hawaii Reseller Exemption

Hawaii reseller exemption attracts 0.5% GET tax.



Note:

This feature is not supported by TaxJar.

7. California Farmers

California farmers benefit from a 5% exemption on state tax

Dynamics 365 Business Central

Sales Order | Work Date: 1/23/2025

1024 · Deerfield Graphics Company

Home Prepare Print/Send Request Approval Order Report **Acumens eSalesTax & Address Verify** Actions Related Fewer options

Validate ship to Address Validate sell to Address Validate bill to Address Calculate SalesTax Exemptions Statistics Reset SalesTax Override Tax Rate API Log

Customer Name: Deerfield Graphics Company Requested Delivery Date:
Contact: Mr. Kevin Wright External Document No.:
Posting Date: 1/23/2025 Status: Open
Order Date: 1/23/2025

Acumens eSalesTax & Address Verify Show more

Ship-to Address Verified:
Zip+4 Address Updated:
Tax Liable:
Tax Area Code: T0074
Shipping Taxable:
Charge Use Tax:
Market Place:
Exemption Customer: Sell-to
Tax Exemption Type:
Sales Tax Calculated:
Sales Tax Errors: 0
Sales Tax %: 2.75
Report to City: 0009
Report to County: 0006

Shipping and Billing 1/23/2025

Lines Manage Line Order

New Line Delete Line Select Items...

Type	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code	Unit Price Excl. Tax	Tax Area Code	Chs... Sales Tax	Invoice Line No.	Tax Group Code	Line Discount %	Line Amount Excl. Tax	Amount Including Tax	Qty. to Ship	Quantity Shipped
Item			PCS	4,000.00	T0074		0	SUPPLIESF		4,000.00	4,110.00	1	

Dynamics 365 Business Central

Sales Order | Work Date: 1/23/2025

1024 · Deerfield Graphics Company

Home Prepare Print/Send Request Approval Order Report **Acumens eSalesTax & Address Verify** Actions Related Fewer options

Validate ship to Address Validate sell to Address Validate bill to Address Calculate SalesTax Exemptions Statistics Reset SalesTax Override Tax Rate API Log

Customer Name: Deerfield Graphics Company Requested Delivery Date:
Contact: Mr. Kevin Wright External Document No.:
Posting Date: 1/23/2025 Status: Open
Order Date: 1/23/2025

Acumens eSalesTax & Address Verify Show more

Ship-to Address Verified:
Zip+4 Address Updated:
Tax Liable:
Tax Area Code: T0074
Shipping Taxable:
Charge Use Tax:
Market Place:
Exemption Customer: Sell-to
Tax Exemption Type:
Sales Tax Calculated:
Sales Tax Errors: 0
Sales Tax %: 2.75
Report to City: 0009
Report to County: 0006

Shipping and Billing 1/23/2025

Lines Manage Line Order

New Line Delete Line Select Items...

Type	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code	Unit Price Excl. Tax	Tax Area Code	Chs... Sales Tax	Invoice Line No.	Tax Group Code	Line Discount %	Line Amount Excl. Tax	Amount Including Tax	Qty. to Ship	Quantity Shipped
Item			PCS	4,000.00	T0074		0	SUPPLIESF		4,000.00	4,110.00	1	

Tax Details | Work Date: 1/23/2025

Search + New Edit List Delete More options

Tax Jurisdiction Code	Tax Group Code	Tax Type	Effective Date	Tax Below Maximum	Syst. Cre...	Maximum Amount/Qty.	Tax Above Maximum
J00094_Y	SUPPLIESF	Sales and ...	12/19/2023	0.5		0.00	0.0
J00094_S	SUPPLIESF	Sales and ...	12/19/2023	2.25		0.00	0.0
J00094_D	SUPPLIESF	Sales and ...	12/19/2023	0.0		0.00	0.0
J00094_C	SUPPLIESF	Sales and ...	12/19/2023	0.0		0.00	0.0
J00094_Y	SUPPLIES	Sales and ...	12/19/2023	0.5		0.00	0.0
J00094_S	SUPPLIES	Sales and ...	12/19/2023	7.25		0.00	0.0
J00094_D	SUPPLIES	Sales and ...	12/19/2023	0.0		0.00	0.0
J00094_C	SUPPLIES	Sales and ...	12/19/2023	0.0		0.00	0.0

Note:

This feature is not supported by TaxJar.

8. Destination based and Origin based Sales Tax calculation.

Destination Based:

Sales Tax is calculated based on ship-to address.

Dynamics 365 Business Central

Sales Order | Work Date: 1/23/2025

1026 - The Cannon Group PLC

Home Prepare Print/Send Request Approval Order Report **Acumens eSalesTax & Address Verify** Actions Related Fewer options

Validate ship to Address Validate sell to Address Validate bill to Address Calculate SalesTax Exemptions Statistics Reset SalesTax Override Tax Rate API Log

General > 1/23/2025 1/23/2025 2/23/2025 Open

Acumens eSalesTax & Address Verify > Yes T0077

Shipping and Billing Show less

Ship-to Custom Address Bill-to Default (Customer)
Code Location Code CA
Name The Cannon Group PLC Shipment Date 1/23/2025
Address 120 E Buell St Shipping Advice Partial
Address 2 Outbound Whse. Handling Time
City Montague Shipping Time 1D
State CA Late Order Shipping Yes
ZIP Code 96064-8000 Combine Shipments ☒
Country/Region US Completely Shipped No
Contact Mr. Andy Teal
Shipment Method
Code EXW
Agent DHL
Agent Service OVERNIGHT
Package Tracking No.

Lines Manage Line Order

Dynamics 365 Business Central

Sales Order | Work Date: 1/23/2025

1026 - The Cannon Group PLC

Home Prepare Print/Send Request Approval Order Report **Acumens eSalesTax & Address Verify** Actions Related Fewer options

Validate ship to Address Validate sell to Address Validate bill to Address Calculate SalesTax Exemptions Statistics Reset SalesTax Override Tax Rate API Log

General > 1/23/2025 1/23/2025 2/23/2025 Open

Acumens eSalesTax & Address Verify Show more

Ship-to Address Verified ☐
Zip+4 Address Updated ☐
Tax Liable ☒
Tax Area Code T0077
Shipping Taxable ☐
Charge Use Tax ☐
Market Place
Exemption Customer Sell-to
Tax Exemption Type
Sales Tax Calculated ☒
Sales Tax Errors 0
Sales Tax % 7.25
Report to City 0001
Report to County 0001

Shipping and Billing > 1/23/2025

Lines Manage Line Order

New Line Delete Line Select Items...

Type	No.	Item Reference No.	Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code	Unit Price Excl. Tax	Tax Area Code	Cha... Sales Tax	Invoice Line No.
→ Item	1000		Bicycle	CA	1			PCS	4,000.00	T0077	<input type="checkbox"/>	0

Subtotal Excl. Tax (USD) 4,000.00 Total Excl. Tax (USD) 4,000.00



Tax Area | Work Date: 1/23/2025



T0077 · SISKIYOU,CA

Acumens eSalesTax & Address Verify

General

Code	T0077	Shipping Taxable	<input type="checkbox"/>
Description	SISKIYOU,CA	Last TaxArea Update	1/3/2024
Country/Region	US	Effective Date	1/3/2024
Round Tax	To Nearest	Tax Area Type	Tax Calc Code
Use External Tax Engi...	<input type="checkbox"/>	Document Type	Order
Geo Address Code	96064,MONTAGUE,SISKIYOU,CA	Document No.	1026
Tax Rate	7.250	SalesTax API	usgeocoder.com

Address Details

Ship-from Address

Address	3051 N D St
City	San Bernardino
State	CA
ZIP Code	92405
County	US

Ship-to Address

Address	120 E Buell St
City	Montague
State	CA
ZIP Code	96064-8000
County	US

Lines



New Line



Delete Line



Tax Jurisdiction Code ↑	Jurisdiction Description	Calculation Order	SalesTax Tax Entity
→ J00097_C	City of MONTAGUE	0	City Tax
J00097_D	City of MONTAGUE	0	Special Tax
J00097_S	State of CA	0	State Tax
J00097_Y	County of SISKIYOU	0	County Tax

Origin based:

Sales Tax is calculated based on ship-from address.

Location Card | Work Date: 1/23/2025

AZ · Arizona

Online Map Resource Locations Zones Bins Inventory Posting Setup Warehouse Employees

General

Code: AZ Exclude from Tax Calc... ☐

Name: Arizona Tax Area Code:

Use As In-Transit: ☐ Tax Exemption No.:

Address & Contact

Show more

Address

Address: 8829 S 51st St

Address 2:

City: Phoenix

State: AZ

ZIP Code: 85044-7792

Country/Region Code: US

Contact

Contact:

Phone No.:

Email:

Home Page:

Electronic Document

ID Ubicación: 0

Show on Map

Warehouse

No No No

Bins

No No No

Bin Policies

Never Check Capacity No No

Dynamics 365 Business Central

Sales Order | Work Date: 1/23/2025

1027 · Selangorian Ltd.

Home Prepare Print/Send Request Approval Order Report Acumens eSalesTax & Address Verify Actions Related Fewer options

Validate ship to Address Validate sell to Address Validate bill to Address Calculate SalesTax Exemptions Statistics Reset SalesTax Override Tax Rate API Log

Acumens eSalesTax & Address Verify

Show less

Address Verify API: Smartly Address Verify API

Sell-to Address Verified: ☐

Ship-to Address Verified: ☐

Bill-to Address Verified: ☐

Zip+4 Address Updated: ☐

Tax Liabilities: ☒

Tax Area Code: T0079

Shipping Taxable: ☐

Charge Use Tax: ☐

Market Place:

Exemption Customer: Sell-to

Tax Exemption No.:

Tax Exemption Type:

Sales Tax Calculated: ☒

Sales Tax Errors: 0

Sales Tax %: 8.6

Created on Taxlar: ☐

Report to City: 0002

Report to County: 0002

Shipping and Billing

1/23/2025

Lines Manage Line Order

New Line Delete Line Select items...

Type	No.	Item Reference No.	Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code	Unit Price Ext. Tax	Tax Area Code	Cha... Sales Tax	Invoice Line No.
Item	1000		Bicycle	AZ	1			PCS	4,000.00	T0079	<input type="checkbox"/>	0



Tax Area | Work Date: 1/23/2025



T0079 · MARICOPA,AZ

Acumens eSalesTax & Address Verify

General

Code	T0079	Shipping Taxable	<input type="radio"/>
Description	MARICOPA,AZ	Last TaxArea Update	1/3/2024
Country/Region	US	Effective Date	1/3/2024
Round Tax	To Nearest	Tax Area Type	Tax Calc Code
Use External Tax Engi...	<input type="radio"/>	Document Type	Order
Geo Address Code	85044,PHOENIX,MARICOPA,AZ	Document No.	1027
Tax Rate	8.600	SalesTax API	usgeocoder.com

Address Details

Ship-from Address

Address	8829 S 51st St
City	Phoenix
State	AZ
ZIP Code	85044-7792
County	US

Ship-to Address

Address	23597 S 223rd Way
City	Queen Creek
State	AZ
ZIP Code	85142
County	US

Lines | New Line | Delete Line

Tax Jurisdiction Code ↑	Jurisdiction Description	Calculation Order	SalesTax Tax Entity
→ J00099_C	City of PHOENIX	0	City Tax
J00099_D	City of PHOENIX	0	Special Tax
J00099_S	State of AZ	0	State Tax

9. Retread Tax

This applies to Tire business in California.

Tire Retreading is charged Tax on 75% of the Tire Amount.

Dynamics 365 Business Central

Sales Order | Work Date: 1/23/2025

1029 - The Cannon Group PLC

Home Prepare Print/Send Request Approval Order Report Acumens eSalesTax & Address Verify Actions Related Fewer options

Post... Release Create Warehouse Shipment Create Inventory Put-away/Pick... Archive Document

General > 1/23/2025 1/23/2025 2/23/2025 Open

Acumens eSalesTax & Address Verify > No

Shipping and Billing > 1/23/2025

Lines Manage Line Order

New Line Delete Line Select Items...

Type	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code	Unit Price Excl. Tax	Tax Area Code	Chal... Sales Tax	Invoice Line No.	Tax Group Code	Line Discount %	Line Amount Excl. Tax	Amount Including Tax
→ Item	CA	1			PCS	1,000.00		<input type="checkbox"/>	0	RETREAD		1,000.00	1,000.00

Subtotal Excl. Tax (USD) 1,000.00 Total Excl. Tax (USD) 1,000.00

Inv. Discount Amount Excl. Tax (USD) 0.00 Total Tax (USD) 0.00

Invoice Discount % 0 Total Incl. Tax (USD) 1,000.00

Invoice Details > 1M(80)

Foreign Trade >

Dranauant\ 1/23/2025

Dynamics 365 Business Central

Sales Order | Work Date: 1/23/2025

1029 - The Cannon Group PLC

Home Prepare Print/Send Request Approval Order Report **Acumens eSalesTax & Address Verify** Actions Related Fewer options

Validate ship to Address Validate sell to Address Validate bill to Address Calculate SalesTax Exemptions Statistics Reset SalesTax Override Tax Rate API Log

General > 1/23/2025 1/23/2025 2/23/2025 Open

Acumens eSalesTax & Address Verify > Yes T0081

Shipping and Billing > 1/23/2025

Lines Manage Line Order

New Line Delete Line Select items...

Type	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code	Unit Price Excl. Tax	Tax Area Code	Cha... Sales Tax	Invoice Line No.	Tax Group Code	Line Discount %	Line Amount Excl. Tax	Amount Including Tax
→ Item	CA	1			PCS	1,000.00	T0081	<input type="checkbox"/>	0	RETREAD		1,000.00	1,054.38

Subtotal Excl. Tax (USD) 1,000.00 Total Excl. Tax (USD) 1,000.00

Inv. Discount Amount Excl. Tax (USD) 0.00 Total Tax (USD) 54.38

Invoice Discount % 0 Total Incl. Tax (USD) 1,054.38

Invoice Details > 1M(8D)

Foreign Trade >

Prepayment > 2/23/2025

Amount	Taxable Amount (75% of Amount)	Tax Rate	Tax Amount
1000	750	0.0725	54.375

Note:

This feature is not supported by TaxJar API:

10. Credit Sales Tax

Credit Tax is used to post a full Sales Tax line. Used to credit overcharge in Sales Tax.

Sales Credit Memo:

Sales Document Calculated:

Dynamics 365 Business Central

Sales Credit Memo | Work Date: 1/23/2025

1004 - The Cannon Group PLC

Home Prepare Request Approval Credit Memo **Acumens eSalesTax & Address Verify** More options

Verify Address Verify Return from Address Verify sell to Address Verify bill to Address Calculate SalesTax Statistics Reset SalesTax Override Tax Rate API Log

Acumens eSalesTax & Address Verify

Ship-to Address Verified ☐ Exemption Customer

Zip+4 Address Updated ☐ Tax Exemption Type

Tax Liable ☒ Sales Tax Calculated ☒

Tax Area Code Sales Tax Errors

Shipping Taxable ☐ Sales Tax %

Exact Tax Reversing ☒ Report to City

Charge Use Tax ☐ Report to County

Market Place

Return-from Address

Original Posted Invoice No. Return-from City

Return-from Code Return-from State

Return-from Name Return-from Post Code

Return-from Address Return-from Country/Region Code

Return-from Address 2 Return-from Contact

Lines **Manage** Functions Line

New Line Delete Line Insert Ext. Text Dimensions Deferral Schedule

Type	No.	Description	Location Code	Quantity	Unit of Measure Code	Unit Price Excl. Tax	Tax Area Code	Cha... Sales Tax	Invoice Line No.	Tax Group Code	Line Amount Excl. Tax	Amount Including Tax	Li
→ G/L Account	84200	State Income Tax	CA	1		1,000.00	T0085	<input type="checkbox"/>	0	G-SALESTAX	1,000.00	1,000.00	

Total Tax is 0:

Lines **Manage** Functions Line

New Line Delete Line Insert Ext. Text Dimensions Deferral Schedule

Type	No.	Description	Location Code	Quantity	Unit of Measure Code	Unit Price Excl. Tax	Tax Area Code	Cha... Sales Tax	Invoice Line No.	Tax Group Code	Line Amount Excl. Tax	Amount Including Tax	Li
→ G/L Account	84200	State Income Tax	CA	1		1,000.00	T0085	<input type="checkbox"/>	0	G-SALESTAX	1,000.00	1,000.00	

Subtotal Excl. Tax (USD) 1,000.00 Total Excl. Tax (USD) 1,000.00

Inv. Discount Amount Excl. Tax (USD) 0.00 Total Tax (USD) 0.00

Invoice Discount % 0 Total Incl. Tax (USD) 1,000.00

On reporting the document Amount is split based on Jurisdictions Tax Percentages of the Original posted document, will have tax amounts but no base amounts:

Dynamics 365 Business Central

SalesTax Entries | Work Date: 1/23/2025

Entry No.	Gen. Bus. Posting Group	Gen. Prod. Posting Group	Posting Date	Document No.	Document Type	Type	Base	Amount	Jurisdiction Type	VAT Calculation Type	Bill-to/Ship-to No.	EU 3-Party Trade	User ID	Source Code	Reason Code
73			1/23/2025	104009	Credit Memo	Sale	0.00	0.00	City	Sales Tax	10000	<input type="checkbox"/>	SBC\BETTY		
74			1/23/2025	104009	Credit Memo	Sale	0.00	0.00	City	Sales Tax	10000	<input type="checkbox"/>	SBC\BETTY		
→ 75			1/23/2025	104009	Credit Memo	Sale	0.00	1,000.00	State	Sales Tax	10000	<input checked="" type="checkbox"/>	SBC\BETTY		
76			1/23/2025	104009	Credit Memo	Sale	0.00	0.00	County	Sales Tax	10000	<input type="checkbox"/>	SBC\BETTY		

The breakdown is based on the original Document jurisdictions percentages:

State: 7.25

County: 0

Special: 0

City: 0

Dynamics 365 Business Central

Posted Sales Invoice | Work Date: 1/23/2025

103046 - The Cannon Group PLC

Home | Print/Send | Invoice | Incoming Document | Electronic Document | Acumens eSalesTax

Update Document | Correct | Find entries... | Track Package | Change Payment Service

General

No. 103046 | Quote No. | Order No. 1016 | Customer The Cannon Group PLC | Contact Mr. Andy Teal | Posting Date 1/23/2025 | Due Date 2/23/2025

Acumens eSalesTax

Tax Liable ☐ | Shipping is Taxable ☐ | Tax Area Code SALES TAX | Sales Tax Errors 0 | Market Place | Tax Exemption Type | Tax Exemption No. | Charge Use Tax ☐ | Sales Tax Rate 7.25

Posted Tax Area Code P10017 | Created on Tackler ☐ | Report to City 0001 | Report to County 0001 | Unincorporated City | Taxability Override ☐ | Update Sales Tax Entry ☐ | Update Tax Rates ☐

Lines | Manage | Line

New Line | Delete Line

Type	No.	Item Reference No.	Description	Quantity	Unit of Measure Code	Unit Price Excl. Tax	Tax Area Code	Tax Code
------	-----	--------------------	-------------	----------	----------------------	----------------------	---------------	----------

Dynamics 365 Business Central

Posted Sales Invoice | Work Date: 1/23/2025

103046 - The Cannon Group PLC

Home | Print/Send | Invoice | Incoming Document | Electronic Document | Acumens eSalesTax

Update Document | Correct | Find entries... | Track Package | Change Payment Service

General

No. 103046 | Quote No. | Order No. 1016 | Customer The Cannon Group PLC | Contact Mr. Andy Teal | Posting Date 1/23/2025 | Due Date 2/23/2025

Acumens eSalesTax

Tax Liable ☐ | Shipping is Taxable ☐ | Tax Area Code SALES TAX | Sales Tax Errors 0 | Market Place | Tax Exemption Type | Tax Exemption No. | Charge Use Tax ☐ | Sales Tax Rate 7.25

Posted Tax Area Code P10017 | Created on Tackler ☐ | Report to City 0001 | Report to County 0001 | Unincorporated City | Taxability Override ☐ | Update Sales Tax Entry ☐ | Update Tax Rates ☐

Lines | Manage | Line

New Line | Delete Line

SUPPLIES - Taxable Olympic Supplies | Work Date: 1/23/2025

Posted Tax Details

Tax Jurisdiction Code	Tax Group Code	Tax Type	Effective Date	Tax Below Maximum	Syst. Cre...	Maximum Amount/Qty.	Tax Above Maximum	Ex
P10068	SUPPLIES	Sales and ...	10/21/2023	0.0	<input checked="" type="checkbox"/>	0.00	0.0	
P10067	SUPPLIES	Sales and ...	10/21/2023	7.25	<input type="checkbox"/>	0.00	0.0	
P10066	SUPPLIES	Sales and ...	10/21/2023	0.0	<input checked="" type="checkbox"/>	0.00	0.0	
→ P10065	SUPPLIES	Sales and ...	10/21/2023	0.0	<input checked="" type="checkbox"/>	0.00	0.0	

11. Override Tax Rate

Override allows users to enter a specific tax rate for a specific document for allowed customers.

API calculated Rate:

Sales Order | Work Date: 1/23/2025

1001 - Highlights Electronics Sdn Bhd

Home Prepare Print/Send Request Approval Order Report **Acumens eSalesTax & Address Verify** Actions Related Fewer options

Validate ship to Address Validate sell to Address Validate bill to Address Calculate SalesTax Exemptions Statistics Reset SalesTax **Override Tax Rate** API Log

Acumens eSalesTax & Address Verify

Ship-to Address Verified ☐ Exemption Customer Show more

Zip+4 Address Updated ☐ Tax Exemption Type

Tax Liability ☒ Sales Tax Calculated ☒

Tax Area Code Sales Tax Errors

Shipping Taxable ☒ Sales Tax %

Charge Use Tax ☐ Report to City

Market Place Report to Country

Shipping and Billing 1/23/2025

Lines Manage Line Order

New Line Delete Line Select Items...

Type	No.	Item Reference No.	Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code	Unit Price Excl. Tax	Tax Area Code	Chk. Sales Tax	Invoice Line No.
Item	1000		Bicycle	BLUE	1			PCS	4,000.00	T0001	<input type="checkbox"/>	0

Subtotal Excl. Tax (\$USD) 4,000.00 Total Excl. Tax (\$USD) 4,000.00

Introducing Override:

Sales Order | Work Date: 1/23/2025

1001 - Highlights Electronics Sdn Bhd

Home Prepare Print/Send Request Approval Order Report **Acumens eSalesTax & Address Verify** Actions Related Fewer options

Validate ship to Address Validate sell to Address Validate bill to Address Calculate SalesTax Exemptions Statistics Reset SalesTax **Override Tax Rate** API Log

Before Override:

Work Date: 1/23/2025

Override Tax rate

New Tax Rates

Document	Sales	CityTax	1.25
StateTax	7.25	SpecialTax	0.00
CountyTax	0.50		

Override Special Tax to 2:

Work Date: 1/23/2025

Override Tax rate

New Tax Rates

Document	Sales	CityTax	1.25
StateTax	7.25	SpecialTax	2.00
CountyTax	0.50		

Override existing Tax Rates?

Yes No

Dynamics 365 Business Central

Sales Order | Work Date: 1/23/2025

1001 · Highlights Electronics Sdn Bhd

Home Prepare Print/Send Request Approval Order Report **Acumens eSalesTax & Address Verify** Actions Related Fewer options

Validate ship to Address Validate sell to Address Validate bill to Address Calculate SalesTax Exemptions Statistics Reset SalesTax Override Tax Rate API Log

General > 1/23/2025 1/23/2025 2/6/2025 Open

Acumens eSalesTax & Address Verify

Ship-to Address Verified ☐ Zip+4 Address Updated ☐ Tax Liable ☒ Tax Area Code T0001 Shipping Taxable ☐ Charge Use Tax ☐ Market Place

Exemption Customer Sell-to Tax Exemption Type Sales Tax Calculated 0 Sales Tax Errors 0 Sales Tax % 11.0 Report to City 0001 Report to County 0001

Shipping and Billing >

1/23/2025

Lines Manage Line Order

New Line Delete Line Select items...

Type	No.	Item Reference No.	Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code	Unit Price Excl. Tax	Tax Area Code	Cha... Sales Tax	Invoice Line No.
→ Item	1000		Bicycle	BLUE	1			PCS	4,000.00	T0001		0

Subtotal Excl. Tax (USD) 4,000.00 Total Excl. Tax (USD) 4,000.00

12. Exact Tax Reversing

Exact Tax Reversing ensures that Sales document reversal is based on the original document sales tax rate.

Original Posted Document:

Sales Tax Rate = 11.00%

The screenshot shows the 'Posted Sales Invoice' form for invoice 103032, dated 1/23/2025, for Highlights Electronics Sdn Bhd. The 'General' section includes fields for No. (103032), Customer (Highlights Electronics Sdn Bhd), Contact (Mr. Mark Darrell Boland), Posting Date (1/23/2025), Due Date (2/6/2025), Quote No., Order No. (1001), Canceled (No), and Closed (No). The 'Acumens eSalesTax' section shows Tax Liabilities, Shipping is Taxable, Tax Area Code (SALESTAX), Sales Tax Errors (0), Market Place, Tax Exemption Type, Tax Exemption No., Charge Use Tax, and Sales Tax Rate (11.00%). The 'Posted Tax Area Code' is PT0001. The 'Lines' section at the bottom shows a table with columns: Type, No., Item Reference No., Description, Quantity, Unit of Measure Code, Unit Price Ext., Tax, Tax Area Code, Tax Group Code, TaxGroup, Taxability Characteristic, and Line Discount %.

Sales Return order:

The screenshot shows the 'Sales Return Order' form for order 1001, dated 1/23/2025, for Highlights Electronics Sdn Bhd. The 'General' section includes fields for Customer No. (20312912), Order No. (1001), and Order Date (1/23/2025). The 'Acumens eSalesTax & Address Verify' section shows Ship-to Address Verified, Zip+4 Address Updated, Tax Liabilities, Tax Area Code, Shipping Taxable, Exact Tax Reversing (checked), Charge Use Tax, Market Place, Exemption Customer (Sell-to), Tax Exemption Type, Sales Tax Calculated, Sales Tax Errors (0), Sales Tax % (0.0), Report to City (0001), and Return-from Address (Original Posted Invoice No. 103032, Return-from Code, Return-from Name: Highlights Electronics Sdn Bhd, Return-from Address: 1337 N San Joaquin St, Return-from Address 2, Return-from City: Stockton, Return-from State: CA, Return-from Post Code: 95202-1108, Return-from Country/Region Co.: US, Return-from Contact: Mr. Mark Darrell Boland). The 'Return-from Address' section shows the original invoice details. The 'Lines' section at the bottom shows a table with columns: Type, No., Item Reference No., Description, Quantity, Unit of Measure Code, Unit Price Ext., Tax, Tax Area Code, Tax Group Code, TaxGroup, Taxability Characteristic, and Line Discount %.

On Tax calculation:

Dynamics 365 Business Central

Sales Return Order | Work Date: 1/23/2025

1001 · Highlights Electronics Sdn Bhd

Home Prepare Print/Send Request Approval Return Order Acumens eSalesTax & Address Verify More options

Verify Address Verify Return from Address Verify sell to Address Verify bill to Address Calculate SalesTax Statistics Reset SalesTax Override Tax Rate API Log

General > Highlights Electronics Sdn Bhd 1/23/2025 1/23/2025 Open

Acumens eSalesTax & Address Verify

Ship-to Address Verified ☐ Zip+4 Address Updated ☐ Tax Liable ☒ Tax Area Code T0002 Shipping Taxable ☐ Exact Tax Reversing ☒ Charge Use Tax ☐ Market Place

Exemption Customer Sell-to Tax Exemption Type Sales Tax Calculated ☒ Sales Tax Errors 0 Sales Tax % 11.0 Report to City 0001 Report to County 0001

Return-from Address

Original Posted Invoice No. 103032 Return-from Code Return-from Name Highlights Electronics Sdn Bhd Return-from Address 1337 N San Joaquin St Return-from Address 2

Return-from City Stockton Return-from State CA Return-from Post Code 95202-1108 Return-from Country/Region Co... US Return-from Contact Mr. Mark Darrell Bolland

Lines Manage Functions Line

New Line Delete Line

Details Attachments (0)

Sell-to Customer Sales History

Customer No. 20312912

Ongoing Sales Quotes 0	Ongoing Sales Blanket Orders 0	Ongoing Sales Orders 0
Ongoing Sales Invoices 0	Ongoing Sales Return Orders 1	Ongoing Sales Credit Memos 0
Posted Sales Shipments 1	Posted Sales Invoices 1	Posted Sales Return Receipts 0
Posted Sales Credit Memos 0		

Customer Details

Customer No. 20312912

Na... Highlights Electronics Sdn Bhd

Phone No.

Email

Fax No.

Credit Limit (\$) 0.00

Available Credit (\$) 0.00

Document Types 1.4 PLANC

13. Extended Taxability:

Extended Resource and Item Taxability is also included in this module. i.e. a resource can be taxable or non-taxable based on an item being processed with in the document and vice versa.

Items:

The screenshot shows the 'Item Card' for '1000 - Bicycle' in Dynamics 365 Business Central. The 'Acumens eSalesTax' section is highlighted with a red box. It contains the following fields:

Acumens eSalesTax	
Taxability	
Product Taxability	Non-Taxable with Resource
Resource Filter Type	Resource Code
Taxability Product Filter	MARTY
Ship-to State Filter	GA

Resources:

The screenshot shows the 'Resource Card' for 'LINA - Lina Townsend' in Dynamics 365 Business Central. The 'Acumens eSalesTax' section is highlighted with a red box. It contains the following fields:

Acumens eSalesTax	
Taxability	
Resource Taxability	Non-Taxable with Product
Product Filter Type	Item Code
Taxability Resource Filter	1000
Auto-add to Order	<input checked="" type="checkbox"/>
Ship-to State Filter	GA

Resource has additional features where it can be auto added to order based on order items.

Dynamics 365 Business Central

Environment: Sandbox

Resource Card

KATHERINE · KATHERINE HULL

Home Resource Report More options

Create Time Sheets...

General >

Person HOUR ESERVICE

Acumens Service Job

Resource Group No: R0010 Location Code: MAIN

Technician: ☒

Invoicing >

LABOR SERVICES

Personal Data >

Acumens eSalesTax

Taxability

Resource Taxability: Standard

Product Filter Type: Item Code

Taxability Resource Filter: 1000

Auto-add to Order: ☒

Ship-to State Filter: GA

14. Sales Tax Activity Log on Posted Documents

This feature logs any change to Sales Tax Custom fields on document posting process.

← POSTED SALES INVOICE | WORK DATE: 1/28/2022

103038 · Progressive Home Furnishings

Invoice Correct Print/Send Navigate Electronic Document Acumens eSalesTax Show Attached Actions Navigate Fewer options

Update Ship-to Info **Sales Tax Activity Log** Statistics

Dynamics 365 Business Central

← Sales Tax Change Log | Work Date: 1/23/2025

Search + New Edit List Delete

Table Caption	Field No. ↑	Field Caption	Type of Change	Old Value	New Value	User ID	Date and Time
Sales Invoice Header	114	Tax Area Code	Insertion		T0084	SBC\BETTY	1/3/2024 10:03 AM
Sales Invoice Header	114	Tax Area Code	Modification	T0084	SALESTAX	SBC\BETTY	1/3/2024 10:03 AM
Sales Invoice Header	115	Tax Liable	Insertion		true	SBC\BETTY	1/3/2024 10:03 AM
Sales Invoice Header	70609	Posted Tax Area Code	Modification		PT0030	SBC\BETTY	1/3/2024 10:03 AM
Sales Invoice Line	85	Tax Area Code	Insertion		T0084	SBC\BETTY	1/3/2024 10:03 AM
→ Sales Invoice Line	85	Tax Area Code	Modification	T0084	SALESTAX	SBC\BETTY	1/3/2024 10:03 AM
Sales Invoice Line	86	Tax Liable	Insertion		true	SBC\BETTY	1/3/2024 10:03 AM
Sales Invoice Line	70609	Posted Tax Area Code	Modification		PT0030	SBC\BETTY	1/3/2024 10:03 AM

15. Sales Tax Report

This is the report used to file state taxes.

To generate this report, we use the Sales Tax Settlement Journal:

The screenshot shows the 'SalesTax Settlement Journal' window with a 'Work Date' of 1/23/2025. The 'General' tab is active, showing a 'Batch Name' of 'SALESTAX'. A 'Repeat' dropdown menu is open, displaying several options: 'Sales Tax Report Batch Processes Update', 'Close Batch', 'SalesTax Report Log', 'Delete Batch Entries', 'View Batch Register', 'Generate Month SalesTax Report' (highlighted with a red box), and 'View SalesTax Tax Entries'. The bottom of the window indicates '(There is nothing to show in this view)'.

The report is run in two steps:

Data Update – this creates the Sales Tax entries.

The screenshot shows the 'SalesTax Report Redesign' dialog box. The 'Options' section is expanded, showing 'Report Options' with 'Generate SalesTax Entries' (checked, highlighted with a red box) and 'Generate Tax Reporting' (unchecked). Under 'Report Filter', 'ZipTaxFilter' is set to 'CA' (highlighted with a red box). 'CategoryFilter1' is 'SALESTAX'. 'EndDate' is '1/31/2025' (highlighted with a red box). 'PeriodType' is '1-Month'. Under 'Data Updates', 'HistStartDate' is '1/1/2025', 'HistEndDate' is '1/31/2025', and 'UpdateHistory' is unchecked. 'UpdateOptions' is set to 'Update New' (highlighted with a red box). The 'Update Batch' dropdown is open, showing 'Update New' (highlighted with a red box) and 'Update All'. 'JournalTemplate' and 'JournalBatch' are both set to 'SALESTAX'. At the bottom, there is a 'Filter: SalesTax Entry II' section with a 'Tax Area Code' field. Buttons for 'Schedule...', 'OK', and 'Cancel' are at the bottom right.

Generate Report – this creates an excel report output from the Sales Tax entries created.

SalesTax Report Redesign

Options

Report Options

Generate SalesTax Entries ☐

Generate Tax Reporting ☒

Report Filter

ZipTaxFilter CA ▾

CategoryFilter1 SALESTAX

CategoryFilter2

CategoryFilter3

EndDate 1/31/2025 ▾

PeriodType 1-Month ▾

Date Filter

StartDate 1/1/2025

EndDate 1/31/2025

PeriodFilter 01/31/25

Show Totals Option

IncludeTotal ☒

Update Batch

JournalTemplate SALESTAX ▾

JournalBatch SALESTAX ▾

Filter: SalesTax Entry II

Sample Report Output.

The screenshot displays the Microsoft Excel application window. The title bar shows the file name 'SalesTax_010125_013125_CA_010324_1150 A.xlsx'. The ribbon is set to 'Home', and the 'Font' group is active, showing options for font face, size, bold, italic, underline, color, and text alignment. The worksheet contains a table with the following data:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y
1	Company Name	USGeocoder																							
2	Report Name	SalesTax Report																							
3	Report No.	70616																							
4	User ID	SBC/BETTY																							
5	Export Date / Time	01/03/2024	11:49:29																						
6	From Date / To Date	01/01/2025	01/31/2025																						
7	Report to State	CA																							
8	Category Filter Code 1	SALESTAX																							
9																									
10																									
11																									
12																									
13																									
14																									
15																									

The status bar at the bottom indicates 'Ready' and 'Accessibility: Good to go'.