

# **Acumens e-Tax (Enterprise) R2 Functional Document**

All versions: MS Dynamics NAV & BC

**Prepared & Developed by**

SBC Dynamics ERP

## Document History

### Revision History:

VERSION	DATE	SECTIONS REVISED	DESCRIPTION
1.0	02-19-2026		Document Prepared

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## Acumens e-Tax (Enterprise) R2

Acumens e-Tax (Enterprise) R2 app extends standard Business Central Sales Tax functionality by introducing address specific sales tax calculation which is fetched from external API's based on a validated address and customizations for special taxes.

This App supports use of Multiple APIs at the same time within one Company in Business Central.

Sales Tax APIs supported 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 filling 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.
4. Zamp - 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 Zamp
5. TaxCloud - 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 TaxCloud
6. Quaderno - 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 Quaderno
7. Kintsugi - 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 Kintsugi
8. Numeral - 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 Numeral

The following address verification APIs are supported:

1. UPS
2. Smarty Street
3. Zamp

The following features are included in this app:

- Sales Tax Calculation
- B2B/ B2C Customer Types
- Exemptions
- Sales Tax handling for Marketplace
- Hawaii Wholesale
- Sales Use Tax
- Hawaii Labor non-exemption
- National Accounts Exemptions

- Override Tax Rates
- Extended Taxability
- Special Tax Rates
  - Retread Tax
  - California Farmers
  - Shipping Tax
  - Service Tax
- Exact Tax Reversal
- Sales Tax Reporting
  - API Upload
  - Manual Reporting
- Posted Documents Sales Tax Related Updates

# 1. Sales Tax Calculation

Tax Calculation for Sales Documents is done based on Ship-to State on the Sales Document which determines which API to get rates from.

Sales Order:

The screenshot shows the 'Sales Order' form in Dynamics 365 Business Central. The header includes 'S-ORD101082 · TaxJar Customer'. The 'Shipping and Billing' section is expanded, showing the following details:

- Ship-to: Alternate Shipping Address
- Code: CA
- Name: TaxJar Customer
- Address: 3304 COOK PEAK RD
- Address 2:
- City: MOUNTAIN MESA
- State: CA
- ZIP Code: 93240-9748
- Phone No.:
- Contact:
- Bill-to: Default (Customer)
- Location Code: CA1
- Shipment Date: 2/19/2026

Below the shipping and billing details is a table for 'Lines' with the following data:

Type	No.	Description	Location Code	Quantity	Qty. to Assemble to Under	Reserved Quantity	Unit of Measure Code	Unit Price Excl. Tax	Chk. Use Tax	Line Discount %	Line Amount Excl. Tax	Amount including tax
Item	1896-S	ATHENS Desk	CA1	1			PCS	1,000.80	<input type="checkbox"/>		1,000.80	1,000.80

Summary values at the bottom of the lines table:

- 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): 0.00
- Invoice Discount %: 0
- Total Incl. Tax (USD): 1,000.80

Nexus Sales Tax API:

The screenshot shows the 'Nexus State APIs' table in Dynamics 365 Business Central. The table has the following columns: State Code, Location Code, State Name, Tax Calculation API, and Tax Reporting API. The data row is as follows:

State Code	Location Code	State Name	Tax Calculation API	Tax Reporting API
CA		California	TAXJAR01	TAXJAR01

## On Calculate Sales Tax for the Document:

Dynamics 365 Business Central

Sales Order  
S-ORD101082 · TaxJar Customer

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

Validate Address Calculate SalesTax Exemptions Reset SalesTax Override Tax Rate API Log Statistics

**Acumens e-Tax** Show more

Ship-to Address Verified  Marketplace   
 Zip+4 Address Updated  Sales Tax Calculated   
 Tax Calculation API TAXJAR01 Sales Tax Errors 0  
 Tax Liable  Sales Tax % 8.25  
 Tax Area Code T0204 Report to City 0002  
 Shipping taxable  Report to County 0001

**Shipping and Billing** CA 2/19/2026

Lines Manage Line Order

New Line Delete Line Select Items...

Type	No.	Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code	Unit Price Excl. Tax	Ch... Use Tax	Line Discount %	Line Amount Excl. Tax	Amount Including Tax
Item	1896-S	ATHENS Desk	CA1	1			PCS	1,000.80	<input type="checkbox"/>		1,000.80	1,083.3

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) 82.57  
 Invoice Discount % 0 Total Incl. Tax (USD) 1,083.37

## On Post Document:

Dynamics 365 Business Central

Posted Sales Invoice  
PS-INV103048 · TaxJar Customer

Home Posting Approve Incoming Document Order Acumens e-Tax Related Fewer options

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

**Acumens e-Tax**

Tax Calculation API TAXJAR01 Tax Reporting API TAXJAR01  
 Tax Liable  Posted Tax Area Code PT0048  
 Tax Area Code E-TAX Created on TaxJar   
 Shipping is Taxable  Created on Zamp   
 Sales Tax Errors 0 Report to City 0002  
 Marketplace Report to County 0001  
 Tax Exemption Type Unincorporated City   
 Tax Exemption No. Taxability Override   
 Charge Use Tax  Update Sales Tax Entry   
 Sales Tax Rate 8.25 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 Group Code	TaxGroup	Taxability Override
Item	1896-S		ATHENS Desk	1	PCS	1,000.80	E-TAX	FURNITURE	FURNITURE	

Invoice Discount Amount Excl. Tax 0.00 Total Tax (USD) 82.57  
 Total Excl. Tax (USD) 1,000.80 Total Incl. Tax (USD) 1,083.37

## 1.1. Field Change Controls:

When Sales Tax is calculated, below field is marked as true.

The screenshot shows the 'Acumens e-Tax' form in Dynamics 365 Business Central. The 'Sales Tax Calculated' field is checked, indicating that sales tax has been calculated. Other fields include 'Tax Exemption Type', 'Sales Tax Errors', 'Sales Tax %', 'Report to City', and 'Report to County'. The 'Shipping and Billing' section shows the location as CA and the date as 6/1/2025. Below the form is a table of lines with columns for Type, Qty. to Assemble to Order, Reserved Quantity, Unit of Measure Code, Unit Price Excl. Tax, Cha. Use Tax, Invoice Line No., Line Discount %, Line Amount Excl. Tax, Subscription Lines, Customer Subscription Contract No., Vendor Subscription Contract No., Amount Including Tax, Qty. to Ship, and Quantity SI.

Type	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code	Unit Price Excl. Tax	Cha. Use Tax	Invoice Line No.	Line Discount %	Line Amount Excl. Tax	Subscription Lines	Customer Subscription Contract No.	Vendor Subscription Contract No.	Amount Including Tax	Qty. to Ship	Quantity SI
Item			PCS	433.60	<input type="checkbox"/>	0		433.60	0			469.37	1	

Summary values:

Field	Value	Field	Value
Subtotal Excl. Tax (USD)	433.60	Total Excl. Tax (USD)	433.60
Inv. Discount Amount Excl. Tax (USD)	0.00	Total Tax (USD)	35.77
Invoice Discount %	0	Total Incl. Tax (USD)	469.37

However, changes to below fields resets that and the document will recalculate tax again.

- i. Posting Date
- ii. Charge Use Tax on Sales Lines

The screenshot shows the 'Acumens e-Tax' form in Dynamics 365 Business Central. The 'Sales Tax Calculated' field is checked, but the 'Charge Use Tax' field is unchecked, indicating that changes to the form will reset the tax calculation. The 'Shipping and Billing' section shows the location as CA and the date as 6/1/2025. Below the form is a table of lines with columns for Type, Qty. to Assemble to Order, Reserved Quantity, Unit of Measure Code, Unit Price Excl. Tax, Cha. Use Tax, Invoice Line No., Line Discount %, Line Amount Excl. Tax, Subscription Lines, Customer Subscription Contract No., Vendor Subscription Contract No., Amount Including Tax, Qty. to Ship, and Quantity SI.

Type	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code	Unit Price Excl. Tax	Cha. Use Tax	Invoice Line No.	Line Discount %	Line Amount Excl. Tax	Subscription Lines	Customer Subscription Contract No.	Vendor Subscription Contract No.	Amount Including Tax	Qty. to Ship	Quantity SI
Item			PCS	433.60	<input type="checkbox"/>	0		433.60	0			469.37	1	

Summary values:

Field	Value	Field	Value
Subtotal Excl. Tax (USD)	433.60	Total Excl. Tax (USD)	433.60
Inv. Discount Amount Excl. Tax (USD)	0.00	Total Tax (USD)	35.77
Invoice Discount %	0	Total Incl. Tax (USD)	469.37

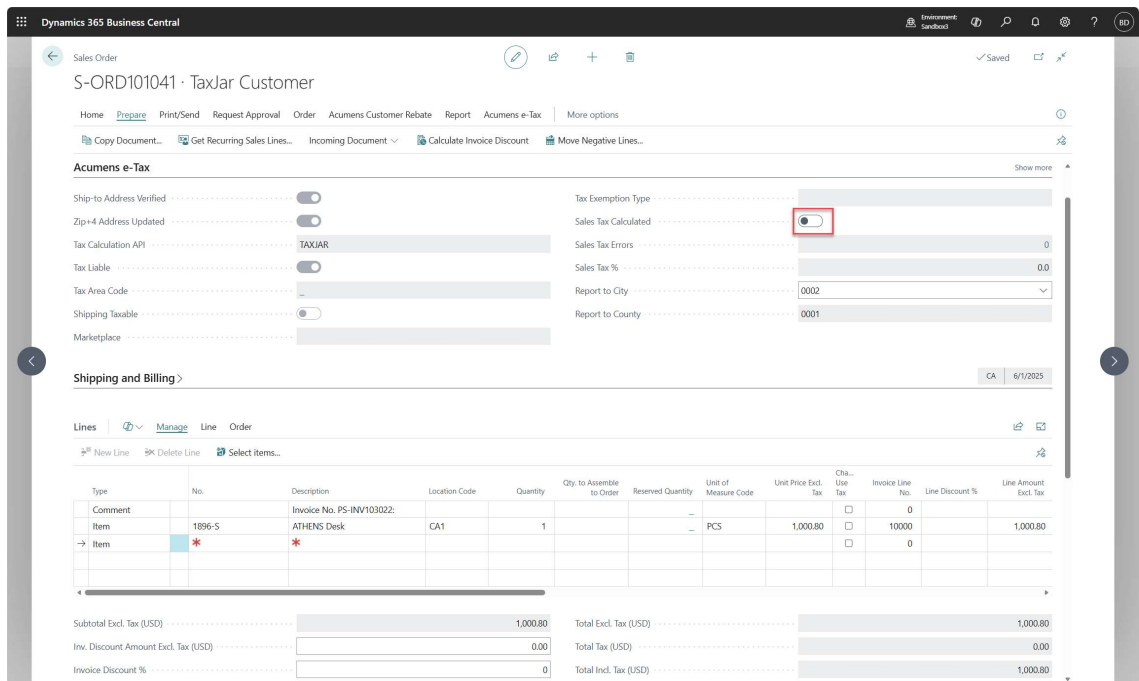
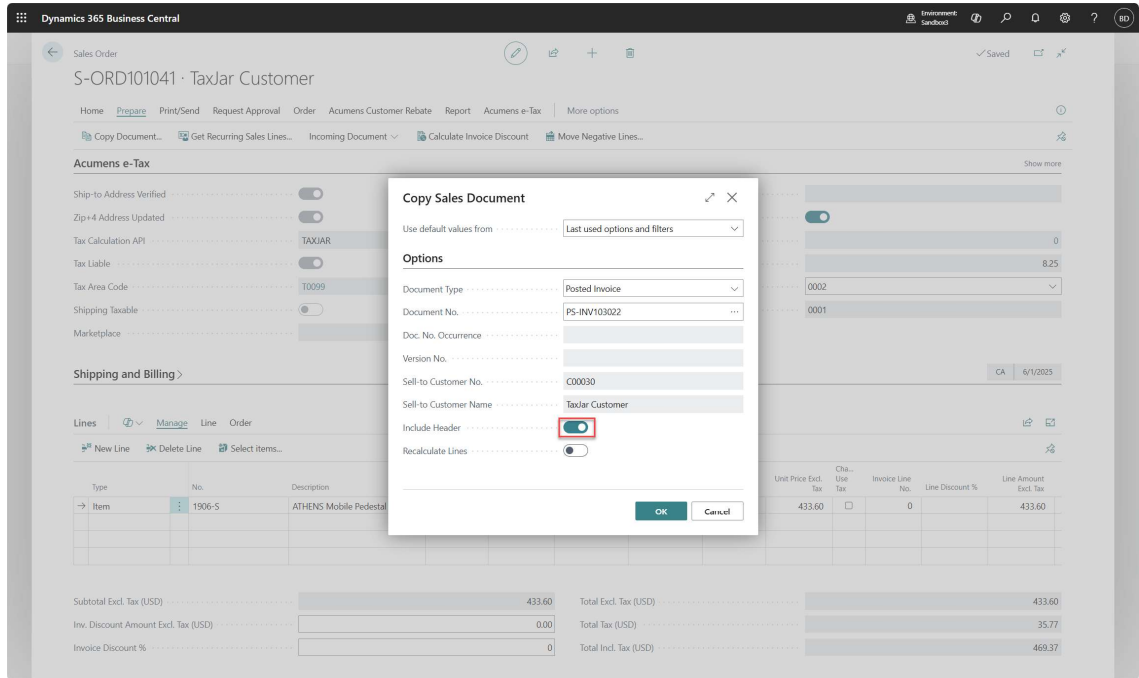
iii. Ship-to Address:

The screenshot displays the 'Acumens e-Tax' and 'Shipping and Billing' sections of a Dynamics 365 Business Central sales order. The 'Acumens e-Tax' section includes fields for 'Ship-to Address Verified', 'Zip+4 Address Updated', 'Tax Calculation API' (set to TAXJAR), 'Tax Liable', 'Tax Area Code' (T0092), 'Shipping Taxable', 'Marketplace', 'Tax Exemption Type', 'Sales Tax Calculated' (checked), 'Sales Tax Errors' (0), 'Sales Tax %' (8.25), 'Report to City' (0002), and 'Report to County' (0001). The 'Shipping and Billing' section shows 'Ship-to' as 'Alternate Shipping Address' with a dropdown menu, 'Code' as 'CA', 'Name' as 'TaxJar Customer', 'Address' as '3304 COOK PEAK RD', 'City' as 'Mountain Mesa', 'State' as 'CA', and 'ZIP Code' as '93240-9748'. Other fields include 'Bill-to' (Default (Customer)), 'Location Code' (CA1), and 'Shipment Date' (6/1/2025).

iv. Copy Document function with option “Include Header” Resets “Sales Tax Calculated” field and will require sales tax to be recalculated after this process.

Note: Copying lines only inherits tax details already in the document.

The screenshot shows the 'Copy Document' function in Dynamics 365 Business Central. The 'Acumens e-Tax' section is visible, with the 'Sales Tax Calculated' field highlighted by a red box. Below this, the 'Shipping and Billing' section is expanded to show the 'Lines' table. The table contains one line item: 'ATHENS Mobile Pedestal' with a quantity of 1, unit price of 433.60, and a line amount of 433.60. The 'Sales Tax Calculated' field is set to 'On' (checked). The 'Lines' table has columns for Type, No., Description, Location Code, Quantity, City to Assemble to Order, Reserved Quantity, Unit of Measure Code, Unit Price Excl. Tax, Chk. Use Tax, Invoice Line No., Line Discount %, and Line Amount Excl. Tax. Summary fields at the bottom show: Subtotal Excl. Tax (USD) 433.60, Total Excl. Tax (USD) 433.60, Inv. Discount Amount Excl. Tax (USD) 0.00, Total Tax (USD) 35.77, and Total Incl. Tax (USD) 469.37.



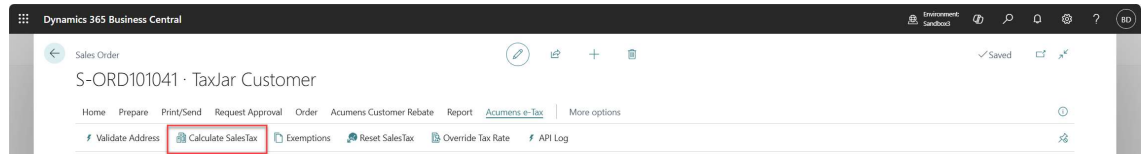
When e-Tax is enabled, below fields are restricted from user modification:

- i. Tax Area Code
- ii. Tax Liabile
- iii. Tax Group Code on Sales Lines.

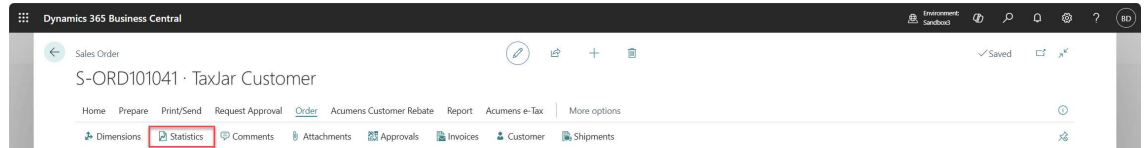
## 1.2. Tax Calculation Triggers:

Below actions trigger tax calculation:

### i. Calculate Sales Tax

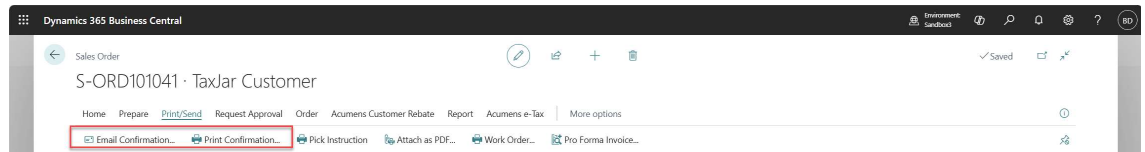


### ii. Statistics



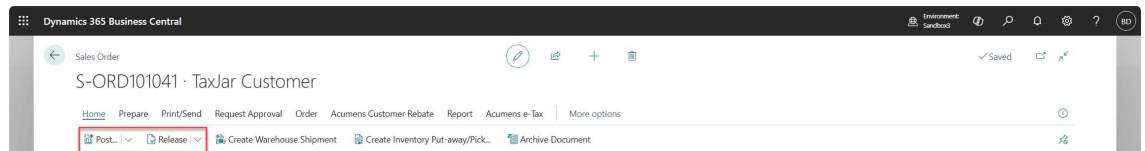
### iii. Standard BC Sales Email Document

### iv. Standard BC Sales Print Document



### v. Release

### vi. Post



## 2. Customer Types

Tax Calculation in Acumens e-Tax is dependent on Customer Type.

There are two Customer Types:

- i. B2B – the API fetching Tax Rates once a month stores them in a Tax Area Code.
- ii. B2C – the API fetching Tax Rates for each Sales Transaction.

B2C:

Customer

Dynamics 365 Business Central  
Customer Card  
C00020 · Taxable Customer

Home Request Approval **New Document** Prices & Discounts Customer Report Acumens Customer Rebate Rental Acumens e-Tax Actions Related Reports Fewer options

Sales Quote **Sales Order** Sales Invoice Sales Credit Memo Reminder Rental Quote Rental Contract Workshop Quote Workshop Order Contract

General > Taxable Customer

Acumens e-Tax Show less

Customer Type	B2C	Mixed Taxability	<input type="checkbox"/>
Tax Classification	No Tax Exemption	Farmers	<input type="checkbox"/>
Marketplace		National Account	<input type="checkbox"/>
WAT Registration No.		Allow Tax Rate Override	<input type="checkbox"/>
Tax Identification Type	Legal Entity	Charge Use Tax	<input type="checkbox"/>
Tax Exemption No.		Report-to City	
Tax Liable	<input type="checkbox"/>	Report-to County	
Tax Area Code			

Sales Order

Dynamics 365 Business Central  
Sales Order  
S-ORD101061 · Taxable Customer

Home Prepare Print/Send Request Approval Order Acumens Customer Rebate Report **Acumens e-Tax** More options

Validate Address Calculate Sales Tax Exemptions Reset Sales Tax Override Tax Rate API Log Statistics

Acumens e-Tax Show more

Ship-to Address Verified	<input type="checkbox"/>	Marketplace	
Zip+4 Address Updated	<input type="checkbox"/>	Sales Tax Calculated	0
Tax Calculation API	<input type="checkbox"/>	Sales Tax Errors	0.00
Tax Liable	<input type="checkbox"/>	Sales Tax %	0.00
Tax Area Code		Report to City	
Shipping Taxable	<input type="checkbox"/>	Report to County	

Shipping and Billing > 6/1/2025

Lines Manage Line Order

New Line Delete Line Select Items...

Type	No.	Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code	Unit Price Excl. Tax	Chk. Use Tax	Line Discount %	Line Amount Excl. Tax	Amount Including Tax
Item	1896-S	ATHENS Desk	CA1	1			PCS	1,000.80	<input type="checkbox"/>		1,000.80	1,000.80

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)	0.00
Invoice Discount %	0	Total Incl. Tax (USD)	1,000.80

Acumens Customer Rebates & Claims

On Calculate Tax, Sales Document Tax Area Code is updated but the Customer Tax Area is not:

### Sales Order

Sales Order  
S-ORD101061 · Taxable Customer

Home Prepare Print/Send Request Approval Order Acumens Customer Rebate Report Acumens e-Tax More options

Validate Address Calculate SalesTax Exemptions Reset SalesTax Override Tax Rate API Log Statistics

**Acumens e-Tax** Show more

Ship-to Address Verified  Tax Exemption Type WHOLESALE  
Zip+4 Address Updated  Sales Tax Calculated   
Tax Calculation API TAXIAR01 Sales Tax Errors 0  
Tax Liable  Sales Tax % 10.5  
Tax Area Code T0147 Report to City  
Shipping Taxable  Report to County  
Marketplace

**Shipping and Billing** 6/1/2025

Lines Manage Line Order

Type	No.	Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code	Unit Price Excl. Tax	Cha... Use Tax	Line Discount %	Line Amount Excl. Tax	Amount Including Tax
Item	1896-S	ATHFNK Pack	CA1	1			PCS	1,000.80			1,000.80	1,000.80

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) 0.00  
Invoice Discount % 0 Total Incl. Tax (USD) 1,000.80

### Customer

Customer Card  
C00020 · Taxable Customer

Home Request Approval New Document Prices & Discounts Customer Report Acumens Customer Rebate Rental Acumens e-Tax Actions Related Reports Fewer options

Sales Quote Sales Order Sales Invoice Sales Credit Memo Reminder Rental Quote Rental Contract Workshop Quote Workshop Order Contract

**General** Taxable Customer

**Acumens e-Tax** Show less

Customer Type B2C Mixed Taxability   
Tax Classification No Tax Exemption Farmers   
Marketplace National Account   
VAT Registration No. Allow Tax Rate Override   
Tax Identification Type Legal Entity Charge Use Tax   
Tax Exemption No. Report to City  
Tax Liable  Report to County  
Tax Area Code

B2B:

## Customer

Dynamics 365 Business Central

Customer Card  
C00020 · Taxable Customer

Home Request Approval **New Document** Prices & Discounts Customer Report Acumens Customer Rebate Rental Acumens e-Tax Actions Related Reports Fewer options

Sales Quote **Sales Order** Sales Invoice Sales Credit Memo Reminder Rental Quote Rental Contract Workshop Quote Workshop Order Contract

General > Taxable Customer

Acumens e-Tax Show less

Customer Type	B2B	Mixed Taxability	<input type="checkbox"/>
Tax Classification	No Tax Exemption	Farmers	<input type="checkbox"/>
Marketplace		National Account	<input type="checkbox"/>
VAT Registration No.		Allow Tax Rate Override	<input type="checkbox"/>
Tax Identification Type	Legal Entity	Charge Use Tax	<input type="checkbox"/>
Tax Exemption No.		Report-to City	
Tax Liable	<input type="checkbox"/>	Report-to County	
Tax Area Code			

## Sales Order

Dynamics 365 Business Central

Sales Order  
S-ORD101062 · Taxable Customer

Home Prepare Print/Send Request Approval Order Acumens Customer Rebate Report **Acumens e-Tax** More options

Validate Address Calculate SalesTax Exemptions Reset SalesTax Override Tax Rate API Log Statistics

Acumens e-Tax Show more

Ship-to Address Verified	<input type="checkbox"/>	Marketplace	
Zip+4 Address Updated	<input type="checkbox"/>	Sales Tax Calculated	0
Tax Calculation API		Sales Tax Errors	0.00
Tax Liable	<input type="checkbox"/>	Sales Tax %	0.00
Tax Area Code		Report-to City	
Shipping Taxable	<input type="checkbox"/>	Report-to County	

Shipping and Billing > 6/1/2025

Lines Manage Line Order

New Line Delete Line Select items...

Type	No.	Description	Location Code	Quantity	City to Assemble to Order	Reserved Quantity	UNIT of Measure Code	UNIT Price Excl. Tax	Ch... Use Tax	Line Discount %	Line Amount Excl. Tax	Amount Including Tax
Item	1906-S	ATHENS Mobile Pedestal	CA1	1			PCS	433.60	<input type="checkbox"/>		433.60	433.6

Subtotal Excl. Tax (USD)	433.60	Total Excl. Tax (USD)	433.60
Inv. Discount Amount Excl. Tax (USD)	0.00	Total Tax (USD)	0.00
Invoice Discount %	0	Total Incl. Tax (USD)	433.60

On Calculate Sales Tax, Document Tax Area code is updated and Customer is also updated:

### Sales Order

Sales Order  
S-ORD101062 · Taxable Customer

Home Prepare Print/Send Request Approval Order Acumens Customer Rebate Report Acumens e-Tax More options

Validate Address Calculate Sales Tax Exemptions Reset Sales Tax Override Tax Rate API Log Statistics

**Acumens e-Tax** Show more

Ship-to Address Verified  Tax Exemption Type WHOLESALE

Zip+4 Address Updated  Sales Tax Calculated

Tax Calculation API TAXIAR01 Sales Tax Errors 0

Tax Liable  Sales Tax % 10.5

Tax Area Code T0148 Report to City

Shipping Taxable  Report to County

Marketplace

**Shipping and Billing** > 6/1/2025

Lines Manage Line Order

New Line Delete Line Select Items...

Type	No.	Description	Location Code	Quantity	City to Assemble to Order	Reserved Quantity	Unit of Measure Code	Unit Price Excl. Tax	Chk. Use Tax	Line Discount %	Line Amount Excl. Tax	Amount Including Tax
Item	1900-S	ATHENS Mujikar Peuketal	CA1	1			PCS	433.60	<input type="checkbox"/>		433.60	433.6

Subtotal Excl. Tax (USD) 433.60 Total Excl. Tax (USD) 433.60

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

Invoice Discount % 0 Total Incl. Tax (USD) 433.60

### Customer

Customer Card  
C00020 · Taxable Customer

Home Request Approval New Document Prices & Discounts Customer Report Acumens Customer Rebate Rental Acumens e-Tax Actions Related Reports Fewer options

Sales Quote Sales Order Sales Invoice Sales Credit Memo Reminder Rental Quote Rental Contract Workshop Quote Workshop Order Contract

**General** > Taxable Customer

**Acumens e-Tax** Show less

Customer Type B2B Mixed Taxability

Tax Classification No Tax Exemption Farmers

Marketplace National Account

VAT Registration No. Allow Tax Rate Override

Tax Identification Type Legal Entity Charge Use Tax

Tax Exemption No. Report to City

Tax Liable  Report to County

Tax Area Code T0148

New Sales Document will now use the Tax Area Code assigned to customer.

Dynamics 365 Business Central

Sales Order S-ORD101063 · Taxable Customer

Home Prepare Print/Send Request Approval Order Acumens Customer Rebate Report Acumens e-Tax More options

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

### Acumens e-Tax

Ship-to Address Verified  Marketplace

Zip+4 Address Updated  Sales Tax Calculated

Tax Calculation API  Sales Tax Errors 0

Tax Liable  Sales Tax % 10.5

Tax Area Code T0148 Report to City

Shipping Taxable  Report to County

### Shipping and Billing

6/1/2025

### Lines

Manage Line Order

New Line Delete Line Select items...

Type	No.	Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code	Unit Price Excl. Tax	Cha... Use Tax	Line Discount %	Line Amount Excl. Tax	Amount Including Tax
Item	1900-S	PARIS Guest Chair, black	CA1	1			PCS	192.80	<input type="checkbox"/>		192.80	213.00

Subtotal Excl. Tax (USD) 192.80 Total Excl. Tax (USD) 192.80

Inv. Discount Amount Excl. Tax (USD) 0.00 Total Tax (USD) 20.24

Invoice Discount % 0 Total Incl. Tax (USD) 213.04

### Acumens Customer Rebates & Claims

### 3. Exemptions:

Acumens e-Tax supports four types of exemptions:

- i. Wholesale (Resale)
- ii. Government
- iii. Marketplace
- iv. Other

Code 1	Exemption Type	Taxer API Description
GOVERNMENT	Government	government
MARKETPLACE	Marketplace	marketplace
OTHER	Other	other
WHOLESALE	Wholesale	wholesale

Exemption:

Chk. in Taxer	Mark for Del.	Customer No.	Exemption State 1	Ship-to Code	Tax Exemption Type	Document Category	Document No.	Document Title	Issued 8
<input type="checkbox"/>	<input type="checkbox"/>	C00010	CA		WHOLESALE				

Sales Order:

Sales Order: S-ORD101042 · Exempt Customer

Acumens e-Tax options:

- Ship-to Address Verified:
- Zip+4 Address Updated:
- Tax Calculation API:
- Tax Liable:
- Tax Area Code:
- Shipping Taxable:
- Marketplace:
- Sales Tax Calculated:
- Sales Tax Errors: 0
- Sales Tax %: 0.0
- Report to City: [Dropdown]
- Report to County: [Dropdown]

Shipping and Billing: 6/1/2025

Type	No.	Description	Location Code	Quantity	City to Assemble to Order	Reserved Quantity	Unit of Measure Code	Unit Price Excl. Tax	Chk. Use Tax	Invoice Line No.	Line Discount %	Line Amount Excl. Tax
Item	1906-S	ATHENS Mobile Pedestal	CA2	1			PCS	433.60	<input type="checkbox"/>	0		433.60

Subtotal Excl. Tax (USD)	433.60	Total Excl. Tax (USD)	433.60
Inv. Discount Amount Excl. Tax (USD)	0.00	Total Tax (USD)	0.00
Invoice Discount %	0	Total Incl. Tax (USD)	433.60

## On Calculate Sales Tax:

Dynamics 365 Business Central

Sales Order

S-ORD101042 · Exempt Customer

Home Prepare Print/Send Request Approval Order Acumens Customer Rebate Report Acumens e-Tax More options

Validate Address Calculate Sales Tax Exemptions Reset Sales Tax Override Tax Rate API Log Statistics

### Acumens e-Tax

Ship-to Address Verified  Tax Exemption Type **WHOLESALE**

Zip+4 Address Updated  Sales Tax Calculated

Tax Calculation API ZAMP Sales Tax Errors 0

Tax Liable  Sales Tax % 10.25

Tax Area Code TD102 Report to City 0003

Shipping Taxable  Report to County 0002

Marketplace

Shipping and Billing > 6/1/2025

Lines Manage Line Order

New Line Delete Line Select Items...

Type	No.	Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code	Unit Price Excl. Tax	Chg. Use Tax	Invoice Line No.	Line Discount %	Line Amount Excl. Tax
Item	1906-S	ATHFNK Mobile Pedestal	CA2	1			PCS	433.60		0		433.60

Subtotal Excl. Tax (USD) 433.60 Total Excl. Tax (USD) 433.60

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

Invoice Discount % 0 Total Incl. Tax (USD) 433.60

## On Post Document:

Dynamics 365 Business Central

Posted Sales Invoice

PS-INV103024 · Exempt Customer

Home Print/Send Invoice Incoming Document Electronic Document Acumens e-Tax More options

Update Document Correct Find entries Track Package Change Payment Service

### Acumens e-Tax

Tax Calculation API ZAMP Tax Reporting API

Tax Liable  Posted Tax Area Code PT0023

Shipping is Taxable  Created on TaxJar

Tax Area Code E-TAX Created on Zamp

Sales Tax Errors 0 Report to City 0003

Marketplace Report to County 0002

Tax Exemption Type **WHOLESALE** Unincorporated City

Tax Exemption No. Taxability Override

Charge Use Tax  Update Sales Tax Entry

Sales Tax Rate 10.25 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 Group Code	Tax Group	Taxability Override
Item	1906-S		ATHENS Mobile Pedestal	1	PCS	433.60	E-TAX	FURNITURE	FURNITURE	

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

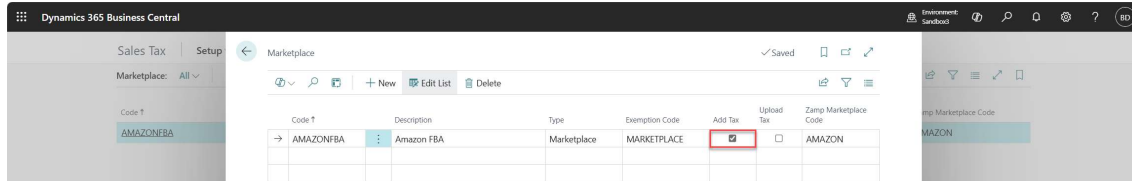
Total Excl. Tax (USD) 433.60 Total Incl. Tax (USD) 433.60

## 4. Marketplace

This is a feature implemented to support sales transactions sold through marketplace platforms when processing them in Business Central.

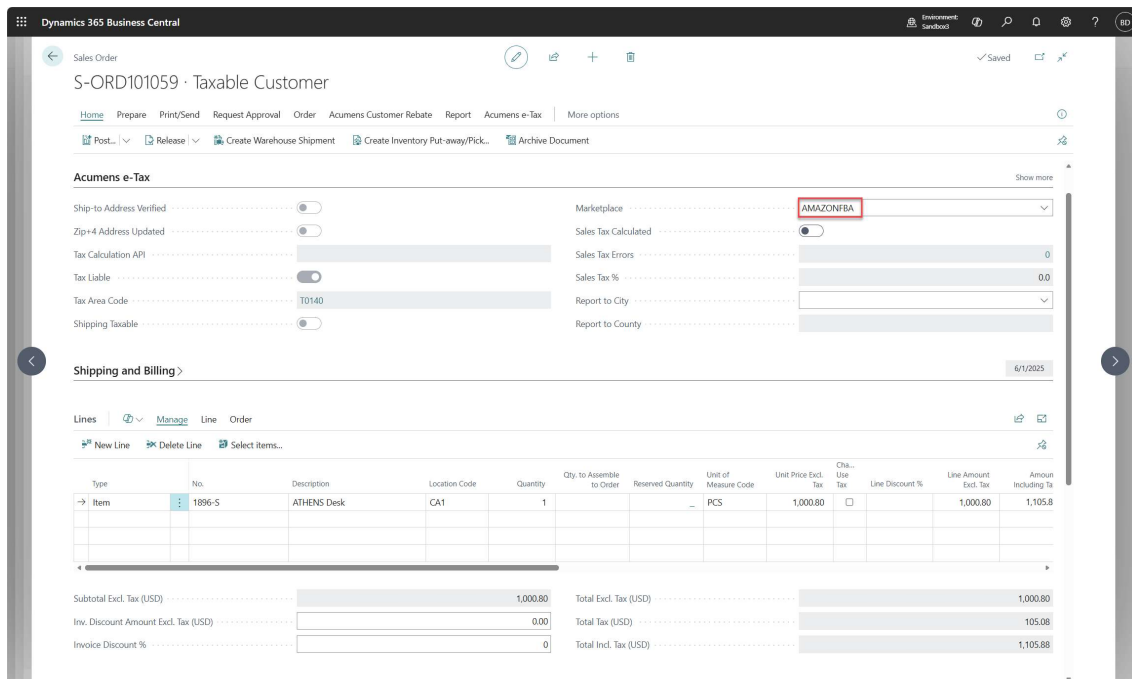
Some Marketplaces will charge and file taxes on behalf of the seller while others will leave tax to be handled by the seller.

Add Tax = True:



The screenshot shows the 'Marketplace' table in Dynamics 365 Business Central. The table has columns for Code #, Description, Type, Exemption Code, Add Tax, Upload Tax, and Zang Marketplace Code. The first row is highlighted with a red box around the 'Add Tax' column, which contains a checked checkbox.

Code #	Description	Type	Exemption Code	Add Tax	Upload Tax	Zang Marketplace Code
AMAZONFBA	Amazon FBA	Marketplace	MARKETPLACE	<input checked="" type="checkbox"/>	<input type="checkbox"/>	AMAZON



The screenshot shows the 'Sales Order' form in Dynamics 365 Business Central. The order is for 'S-ORD101059' and is for a 'Taxable Customer'. The 'Acumens e-Tax' section is expanded, showing various tax-related fields. The 'Marketplace' field is set to 'AMAZONFBA' and is highlighted with a red box. The 'Sales Tax Calculated' field is set to '0'. The 'Shipping and Billing' section is also visible, showing a single line item for 'ATHENS Desk' with a quantity of 1 and a unit price of 1,000.80.

**Acumens e-Tax**

Ship-to Address Verified  Marketplace **AMAZONFBA**

Zip+4 Address Updated  Sales Tax Calculated

Tax Calculation API  Sales Tax Errors 0

Tax Liable  Sales Tax % 0.0

Tax Area Code T0140 Report to City

Shipping Taxable  Report to County

**Shipping and Billing** 6/1/2025

**Lines** Manage Line Order

Type	No.	Description	Location Code	Quantity	City to Assemble to Order	Reserved Quantity	Unit of Measure Code	Unit Price Excl. Tax	Chk... Use Tax	Line Discount %	Line Amount Excl. Tax	Amount Including Tax
Item	1896-5	ATHENS Desk	CA1	1			PCS	1,000.80	<input type="checkbox"/>		1,000.80	1,105.8

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) 105.08

Invoice Discount % 0 Total Incl. Tax (USD) 1,105.88

## On Calculate Tax:

Dynamics 365 Business Central

Sales Order S-ORD101059 · Taxable Customer

Home Prepare Print/Send Request Approval Order Acumens Customer Rebate Report Acumens e-Tax More options

Validate Address Calculate Sales Tax Exemptions Reset Sales Tax Override Tax Rate API Log Statistics

**Acumens e-Tax** Show more

Ship-to Address Verified  Marketplace AMAZONFBA

Zip+4 Address Updated  Sales Tax Calculated

Tax Calculation API TAXIAR01 Sales Tax Errors 0

Tax Liable  Sales Tax % 10.5

Tax Area Code T0141 Report to City

Shipping Taxable  Report to County

**Shipping and Billing** 6/1/2025

Lines Manage Line Order

New Line Delete Line Select items...

Type	No.	Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code	Unit Price Excl. Tax	Chk. Use Tax	Line Discount %	Line Amount Excl. Tax	Amount Including Tax
Item	1896-S	ATHENS Desk	CA1	1			PCS	1,000.80	<input type="checkbox"/>		1,000.80	1,105.8

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) 105.08

Invoice Discount % 0 Total Incl. Tax (USD) 1,105.88

## Add Tax = False:

Dynamics 365 Business Central

Sales Tax Setup

Marketplace: All

Code? AMAZONFBA

Marketplace

+ New Edit List Delete

Code #	Description	Type	Exemption Code	Add Tax	Upload Tax	Zamp Marketplace Code
AMAZONFBA	Amazon FBA	Marketplace	MARKETPLACE	<input type="checkbox"/>	<input type="checkbox"/>	AMAZON

Dynamics 365 Business Central

Sales Order S-ORD101060 · Taxable Customer

Home Prepare Print/Send Request Approval Order Acumens Customer Rebate Report Acumens e-Tax More options

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

**Acumens e-Tax** Show more

Ship-to Address Verified  Marketplace AMAZONFBA

Zip+4 Address Updated  Sales Tax Calculated

Tax Calculation API Sales Tax Errors 0

Tax Liable  Sales Tax % 0.0

Tax Area Code T0140 Report to City

Shipping Taxable  Report to County

**Shipping and Billing** 6/1/2025

Lines Manage Line Order

New Line Delete Line Select items...

Type	No.	Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code	Unit Price Excl. Tax	Chk. Use Tax	Line Discount %	Line Amount Excl. Tax	Amount Including Tax
Item	1896-S	ATHENS Desk	CA1	1			PCS	1,000.80	<input type="checkbox"/>		1,000.80	1,105.8

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) 105.08

Invoice Discount % 0 Total Incl. Tax (USD) 1,105.88

Acumens Customer Rebates & Claims

# On Calculate Tax:

Dynamics 365 Business Central

Sales Order: S-ORD101060 · Taxable Customer

Home Prepare Print/Send Request Approval Order Acumens Customer Rebate Report **Acumens e-Tax** More options

Validate Address Calculate SalesTax Exemptions Reset SalesTax Override Tax Rate API Log Statistics

### Acumens e-Tax

Ship-to Address Verified  Marketplace: AMAZONFRA

Zip+4 Address Updated  Sales Tax Calculated

Tax Calculation API: TAXIAR01 Sales Tax Errors: 0

Tax Liable  Sales Tax %: 10.5

Tax Area Code: T0144 Report to City: [Dropdown]

Shipping Taxable  Report to County: [Dropdown]

---

### Shipping and Billing

6/1/2025

Lines Manage Line Order

New Line Delete Line Select items...

Type	No.	Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code	Unit Price Excl. Tax	Chk. Use Tax	Line Discount %	Line Amount Excl. Tax	Amount Including Tax
Item	1896-S	ATHENS Desk	CA1	1			PCS	1,000.80	<input type="checkbox"/>		1,000.80	1,000.8

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)	0.00
Invoice Discount %	0	Total Incl. Tax (USD)	1,000.80

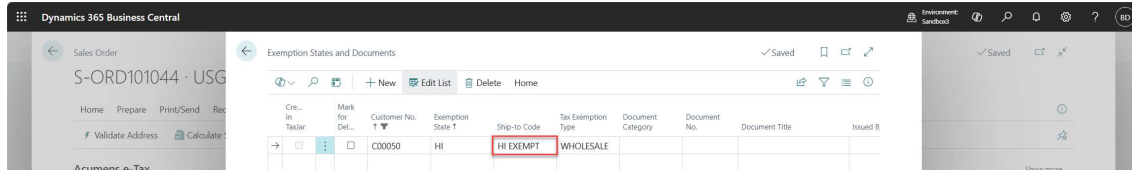
Acumens Customer Rebates & Claims

## 5. Hawaii Wholesale

Hawaii resale attracts 0.5% tax.

This feature is supported by USGeocoder and ZipTax.

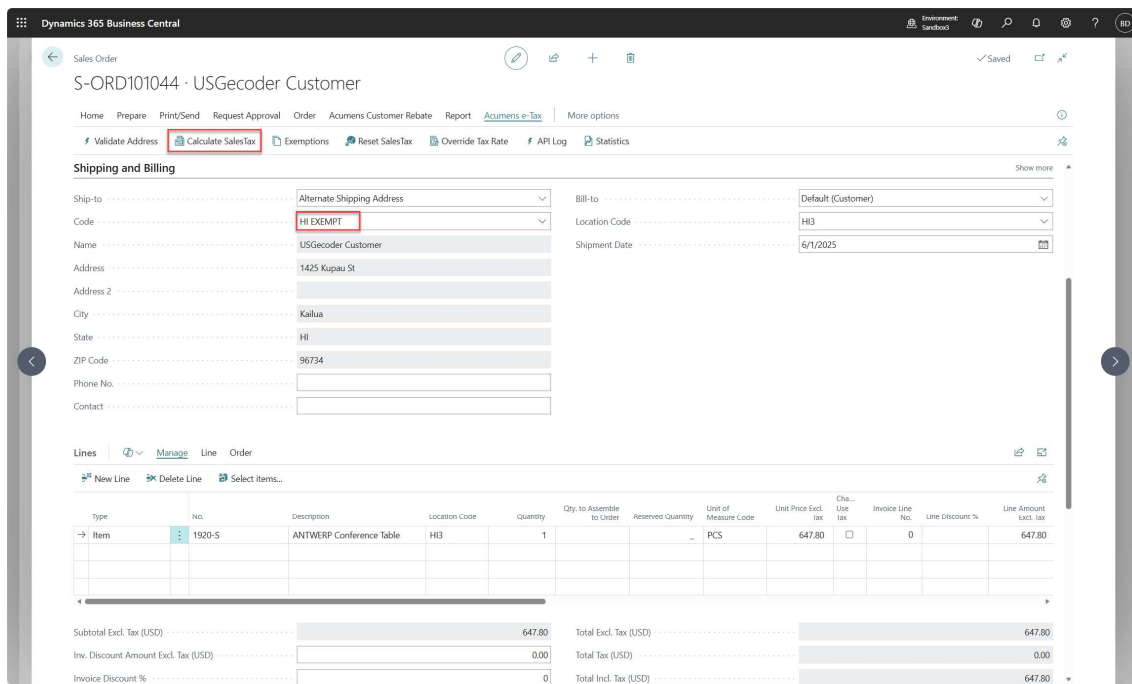
Exemption:



The screenshot shows the 'Exemption States and Documents' table in Dynamics 365 Business Central. The table has columns for 'Crc. in Taxat.', 'Mark for Del.', 'Customer No.', 'Exemption State 1', 'Ship-to Code', 'Tax Exemption Type', 'Document Category', 'Document No.', 'Document Title', and 'Issued B'. A row is visible with 'Customer No.' C00050, 'Exemption State 1' HI, 'Ship-to Code' HI EXEMPT (highlighted with a red box), and 'Tax Exemption Type' WHOLESALE.

Crc. in Taxat.	Mark for Del.	Customer No.	Exemption State 1	Ship-to Code	Tax Exemption Type	Document Category	Document No.	Document Title	Issued B
		C00050	HI	HI EXEMPT	WHOLESALE				

Sales Order:



The screenshot shows the 'Sales Order' form in Dynamics 365 Business Central for sales order S-ORD101044. The 'Shipping and Billing' section is expanded, showing fields for 'Ship-to' (Alternate Shipping Address), 'Code' (HI EXEMPT, highlighted with a red box), 'Name' (USGeocoder Customer), 'Address' (1425 Kupau St), 'City' (Kailua), 'State' (HI), and 'ZIP Code' (96734). The 'Bill-to' field is set to 'Default (Customer)' and the 'Location Code' is 'HI3'. The 'Lines' section shows a single line item: 'ANTWERP Conference Table' with a quantity of 1 and a unit price of 647.80. The 'Subtotal Excl. Tax (USD)' is 647.80, and the 'Total Excl. Tax (USD)' is also 647.80. The 'Total Tax (USD)' is 0.00, and the 'Total Incl. Tax (USD)' is 647.80.

Type	No.	Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code	Unit Price Excl. tax	Chk. Use tax	Invoice Line No.	Line Discount %	Line Amount Excl. tax
Item	1920-S	ANTWERP Conference Table	HI3	1			PCS	647.80	<input type="checkbox"/>	0		647.80

Subtotal Excl. Tax (USD)	Total Excl. Tax (USD)
647.80	647.80

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

Invoice Discount %	Total Incl. Tax (USD)
0	647.80

## On Calculate Tax:

Dynamics 365 Business Central

Sales Order

S-ORD101044 · USGecoder Customer

Home Prepare Print/Send Request Approval Order Acumens e-Tax Report Acumens e-Tax More options

Validate Address Calculate SalesTax Exemptions Reset SalesTax Override Tax Rate API Log Statistics

### Acumens e-Tax

Ship-to Address Verified  Tax Exemption Type **WHOLESALE**

Zip+4 Address Updated  Sales Tax Calculated

Tax Calculation API USG Sales Tax Errors 0

Tax Liable  Sales Tax % **0.5**

Tax Area Code T0106 Report to City 0012

Shipping Taxable  Report to County 0004

Marketplace

Shipping and Billing > HI EXEMPT 6/1/2025

### Lines

Manage Line Order

New Line Delete Line Select items...

Type	No.	Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code	Unit Price Excl. Tax	Chg. Use Tax	Invoice Line No.	Line Discount %	Line Amount Excl. Tax
Item	1920-S	ANTWERP Conference Table	H13	1			PCS	647.80	<input type="checkbox"/>	0		647.80

Subtotal Excl. Tax (USD) 647.80 Total Excl. Tax (USD) 647.80

Inv. Discount Amount Excl. Tax (USD) 0.00 Total Tax (USD) **3.24**

Invoice Discount % 0 Total Incl. Tax (USD) 651.04

## On Post Document:

Dynamics 365 Business Central

Posted Sales Invoice

PS-INV103025 · USGecoder Customer

Home Print/Send Invoice Incoming Document Electronic Document Acumens e-Tax More options

Update Document Correct Find entries Track Package Change Payment Service

### Acumens e-Tax

Tax Calculation API USG Tax Reporting API

Tax Liable  Posted Tax Area Code PT0024

Shipping is Taxable  Created on TaxJar

Tax Area Code E-TAX Created on Zamp

Sales Tax Errors 0 Report to City 0012

Marketplace Report to County 0004

Tax Exemption Type **WHOLESALE** Unincorporated City

Tax Exemption No. Taxability Override

Charge Use Tax  Update Sales Tax Entry

Sales Tax Rate **0.5** 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 Group Code	TaxGroup	Taxability Override
Item	1920-S		ANTWERP Conference Table	1	PCS	647.80	E-TAX	FURNITURE	FURNITURE	

Invoice Discount Amount Excl. Tax 0.00 Total Tax (USD) 3.24

Total Excl. Tax (USD) 647.80 Total Incl. Tax (USD) 651.04

## 6. Sales Use Tax

Resale customers are required to pay sales tax for products they consume internally.

Those lines are marked to “Charge Use Tax” on Sales Lines.

Sales Order S-ORD101045 · Exempt Customer

Home Prepare Print/Send Request Approval Order Acumens Customer Rebate Report **Acumens e-Tax** More options

Validate Address **Calculate Sales Tax** Exemptions Reset Sales Tax Override Tax Rate API Log Statistics

**Acumens e-Tax**

Ship-to Address Verified  Marketplace

Zip+4 Address Updated  Sales Tax Calculated

Tax Calculation API  Sales Tax Errors 0

Tax Liable  Sales Tax % 0.0

Tax Area Code  Report to City

Shipping Taxable  Report to County

**Shipping and Billing** 6/1/2025

Lines Manage Line Order

New Line Delete Line Select Items...

Type	Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code	Unit Price Excl. Tax	Charge Use Tax	Invoice Line No.	Line Discount %	Line Amount Excl. Tax	Amount Including Tax †	Subst.
Item	LONDON Swivel Chair, blue	CA2	1			PCS	190.10	<input type="checkbox"/>	0		190.10	190.10	
Item	ANTWERP Conference Table	CA2	1			PCS	647.80	<input checked="" type="checkbox"/>	0		647.80	647.80	

Subtotal Excl. Tax (USD) 837.90 Total Excl. Tax (USD) 837.90

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

Invoice Discount % 0 Total Incl. Tax (USD) 837.90

On Calculate Sales Tax:

Line marked to charge use Tax charges tax, and the other lines are not.

Sales Order S-ORD101045 · Exempt Customer

Home Prepare Print/Send Request Approval Order Acumens Customer Rebate Report **Acumens e-Tax** More options

Validate Address Calculate Sales Tax Exemptions Reset Sales Tax Override Tax Rate API Log Statistics

**Acumens e-Tax**

Ship-to Address Verified  Tax Exemption Type **WHOLESALE**

Zip+4 Address Updated  Sales Tax Calculated

Tax Calculation API ZAMP Sales Tax Errors 0

Tax Liable  Sales Tax % 10.25

Tax Area Code T0109 Report to City 0003

Shipping Taxable  Report to County 0002

Marketplace

**Shipping and Billing** 6/1/2025

Lines Manage Line Order

New Line Delete Line Select Items...

Type	Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code	Unit Price Excl. Tax	Charge Use Tax	Invoice Line No.	Line Discount %	Line Amount Excl. Tax	Amount Including Tax †	Subst.
Item	LONDON Swivel Chair, blue	CA2	1			PCS	190.10	<input type="checkbox"/>	0		190.10	190.10	
Item	ANTWERP Conference Table	CA2	1			PCS	647.80	<input checked="" type="checkbox"/>	0		647.80	714.20	

Subtotal Excl. Tax (USD) 837.90 Total Excl. Tax (USD) 837.90

Inv. Discount Amount Excl. Tax (USD) 0.00 Total Tax (USD) 66.40

Invoice Discount % 0 Total Incl. Tax (USD) 904.30

Posted Document:

Dynamics 365 Business Central

Posted Sales Invoice

PS-INV103026 · Exempt Customer

Home | Print/Send | Invoice | Incoming Document | Electronic Document | Acumens e-Tax | More options

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

### Acumens e-Tax

Tax Calculation API	ZAMP	Tax Reporting API	
Tax Liabile	<input type="checkbox"/>	Posted Tax Area Code	PT0025
Shipping is Taxable	<input type="checkbox"/>	Created on TaxJar	<input type="checkbox"/>
Tax Area Code	E-TAX	Created on Zamp	<input type="checkbox"/>
SalesTax Errors	0	Report to City	0003
Marketplace		Report to County	0002
Tax Exemption Type	WHOLESALE	Unincorporated City	<input type="checkbox"/>
Tax Exemption No.		Taxability Override	<input type="checkbox"/>
Charge Use Tax	<input type="checkbox"/>	Update SalesTax Entry	<input type="checkbox"/>
SalesTax Rate	10.25	UpdateTaxRates	<input type="checkbox"/>

Lines | Manage | Line

New Line | Delete Line

Type	Description	Quantity	Unit of Measure Code	Unit Price Excl. Tax	Tax Area Code	Tax Group Code	TaxGroup	Taxability Override	Ch... Use Tax	Line Discount %
Item	ANTWERP Conference Table	1	PCS	647.60	E-TAX	J68E	TAXP		<input type="checkbox"/>	
Item	LONDON Swivel Chair, blue	1	PCS	190.10	E-TAX	ZUSETAX	ZUSETAX		<input type="checkbox"/>	

Invoice Discount Amount Excl. Tax	0.00	Total Tax (USD)	66.40
Total Excl. Tax (USD)	837.90	Total Incl. Tax (USD)	904.30

## 7. Hawaii Labor non-exemption:

Labor is Taxable in Hawaii regardless of customer exemption i.e. government exempt customers will not pay tax for products but will pay tax for Labor.

Exemption:

The screenshot shows the 'Exemption States and Documents' table in Dynamics 365 Business Central. The table has columns for 'Cre... in Taxat...', 'Mark for Det...', 'Customer No.', 'Exemption State 1', 'Ship-to Code', 'Tax Exemption Type', 'Document Category', 'Document No.', 'Document Title', and 'Issued #'. Two rows are visible, both with 'CA' in the 'Exemption State 1' column and 'WHOLESALE' in the 'Tax Exemption Type' column. The 'WHOLESALE' text is highlighted with a red box.

Cre... in Taxat...	Mark for Det...	Customer No.	Exemption State 1	Ship-to Code	Tax Exemption Type	Document Category	Document No.	Document Title	Issued #
<input type="checkbox"/>	<input type="checkbox"/>	C00030	CA		WHOLESALE				
<input type="checkbox"/>	<input type="checkbox"/>	C00030	HI		WHOLESALE				

Sales Order – Hawaii Mixed Taxability client:

The screenshot shows the 'Sales Order' form in Dynamics 365 Business Central for a 'TaxJar Customer'. The form is titled 'S-ORD101058 · TaxJar Customer'. It includes sections for 'Acumens e-Tax' and 'Shipping and Billing'. In the 'Acumens e-Tax' section, the 'Sales Tax Calculated' toggle is turned on and highlighted with a red box. The 'Shipping and Billing' section shows a table with two lines: 'ATHENS Desk' (1 PCS, 1,000.80) and 'Marty Horst' (1 HOUR, 139.00). The 'Marty Horst' line has a 'Cha... Use Tax' checkbox checked and highlighted with a red box. At the bottom, a summary table shows 'Subtotal Excl. Tax (USD)' as 1,139.80, 'Total Excl. Tax (USD)' as 1,139.80, 'Inv. Discount Amount Excl. Tax (USD)' as 0.00, and 'Total Tax (USD)' as 0.00.

Type	Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code	Unit Price Excl. Tax	Cha... Use Tax	Line Discount %	Line Amount Excl. Tax	Amount Including Tax	Subscription Lines	Custom Subst. Control
Item	ATHENS Desk	HI1	1			PCS	1,000.80	<input type="checkbox"/>		1,000.80	1,000.80	0	
Resource	Marty Horst	HI1	1			HOUR	139.00	<input checked="" type="checkbox"/>		139.00	139.00	0	

Subtotal Excl. Tax (USD)	1,139.80	Total Excl. Tax (USD)	1,139.80
Inv. Discount Amount Excl. Tax (USD)	0.00	Total Tax (USD)	0.00
Invoice Discount %	0	Total Incl. Tax (USD)	1,139.80

# On Calculate Tax:

Dynamics 365 Business Central

Sales Order S-ORD101058 · TaxJar Customer

Home Prepare Print/Send Request Approval Order Acumens Customer Rebate Report **Acumens e-Tax** More options

Validate Address Calculate SalesTax Exemptions Reset SalesTax Override Tax Rate API Log Statistics

### Acumens e-Tax

Ship-to Address Verified  Tax Exemption Type **GOVERNMENT**

Zip+4 Address Updated  Sales Tax Calculated

Tax Calculation API TAXJAR01 Sales Tax Errors 0

Tax Liable  Sales Tax % 4.712

Tax Area Code T0137 Report to City

Shipping Taxable  Report to County

Marketplace

Shipping and Billing > HI EXEMPT 6/1/2025

Lines Manage Line Order

New Line Delete Line Select Items...

Type	Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code	Unit Price Excl. Tax	Chk. Use Tax	Line Discount %	Line Amount Excl. Tax	Amount Including Tax	Subscription Lines	Custom Subst. Control
Item	ATHENS Desk	HI1	1			PCS	1,000.80	<input type="checkbox"/>		1,000.80	1,000.80	0	
Resource	Marty Horst	HI1	1			HOURL	139.00	<input checked="" type="checkbox"/>		139.00	145.55	0	
Subtotal Excl. Tax (USD)							1,139.80	Total Excl. Tax (USD)		1,139.80			
Inv. Discount Amount Excl. Tax (USD)							0.00	Total Tax (USD)		6.55			
Invoice Discount %							0	Total Incl. Tax (USD)		1,146.35			

## 8. National Accounts Exemptions:

With National Accounts, all customers' sales billed to this account use the National Account Customer Exemption.

Sales Order:

The screenshot shows the 'Sales Order' form for 'S-ORD101051' with 'Taxable Customer' selected. The 'Acumens e-Tax' section has several toggle switches for 'Ship-to Address Verified', 'Zip+4 Address Updated', 'Tax Calculation API', 'Tax Liable', 'Tax Area Code', and 'Shipping Taxable'. The 'Shipping and Billing' section shows 'Ship-to' as 'Default (Sell-to Address)' and 'Bill-to' as 'Another Customer' with 'National Account' selected. The 'Lines' table contains one item: 'PARIS Guest Chair, black' with quantity 1 and unit price 192.80.

Type	No.	Description	Location Code	Quantity	Tax Group Code	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code	Unit Price Excl. Tax	Ch... Use Tax	Invoice Line No.	Line Discount %
Item	1900-S	PARIS Guest Chair, black	CA1	1	FURNITURE			PCS	192.80	<input type="checkbox"/>	0	

On Calculate Tax:

The screenshot shows the 'Sales Order' form with 'WHOLESALE' selected for 'Tax Exemption Type'. The 'Tax Liable' toggle is checked. The 'Tax Area Code' is '10118'. The 'Shipping and Billing' section shows 'National Account' and '6/1/2025'. The 'Lines' table is the same as in the previous screenshot. At the bottom, the tax calculation summary shows 'Total Tax (USD)' as 0.00 and 'Total Incl. Tax (USD)' as 192.80.

Type	No.	Description	Location Code	Quantity	Tax Group Code	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code	Unit Price Excl. Tax	Ch... Use Tax	Invoice Line No.	Line Discount %
Item	1900-S	PARIS Guest Chair, black	CA1	1	FURNITURE			PCS	192.80	<input checked="" 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
Invoice Discount %	0	Total Incl. Tax (USD)	192.80

Posted Sales Documents:

Dynamics 365 Business Central

Posted Sales Invoice

PS-INV103027 · Taxable Customer

Home | Posting | Approve | Incoming Document | Order | Acumens e-Tax | More options

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

**Acumens e-Tax**

Tax Calculation API ..... TAXIAR

Tax Reporting API ..... [ ]

Tax Liabile ..... [ ]

Posted Tax Area Code ..... PT0026

Shipping is Taxable ..... [ ]

Created on Taxlar ..... [ ]

Tax Area Code ..... E-TAX

Created on Zamp ..... [ ]

SalesTax Errors ..... 0

Report to City ..... 0020

Marketplace ..... [ ]

Report to County ..... 0003

Tax Exemption Type ..... WHOLESALE

Unincorporated City ..... [ ]

Tax Exemption No. .... [ ]

Taxability Override ..... [ ]

Charge Use Tax ..... [ ]

Update SalesTax Entry ..... [ ]

SalesTax Rate ..... 10.5

UpdateTaxRates ..... [ ]

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 Group Code	TaxGroup	Taxability Override
Item	1900-S		PARIS Guest Chair, black	1	ECS	192.80	E-TAX	FURNITURE	FURNITURE	

Invoice Discount Amount Excl. Tax ..... 0.00

Total Tax (USD) ..... 0.00

Total Excl. Tax (USD) ..... 192.80

Total Incl. Tax (USD) ..... 192.80

## 9. Override Tax Rates

This feature is used to correct tax rates for remote or complex address that APIs could not get right. It does not apply to Return Orders and Credit Memos.

Sales Order:

**Sales Order S-ORD101052 · Taxable Customer**

Home Prepare Print/Send Request Approval Order Acumens Customer Rebate Report Acumens e-Tax More options

Validate Address Calculate Sales Tax Exemptions Reset Sales Tax Override Tax Rate API Log Statistics

**Acumens e-Tax**

Ship-to Address Verified  Tax Exemption Type

Zip+4 Address Updated  Sales Tax Calculated

Tax Calculation API Sales Tax Errors 0

Tax Liable  Sales Tax % 0.0

Tax Area Code Report to City

Shipping Taxable  Report to County

Marketplace

**Shipping and Billing** 6/1/2025

Lines Manage Line Order

New Line Delete Line Select items...

Type	No.	Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code	Unit Price Excl. Tax	Cha... Use Tax	Invoice Line No.	Line Discount %	Line Amount Excl. Tax
Item	1908-S	LONDON Swivel Chair, blue	CA1	1			PCS	190.10	<input type="checkbox"/>	0		190.10

Subtotal Excl. Tax (USD) 190.10 Total Excl. Tax (USD) 190.10

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

Invoice Discount % 0 Total Incl. Tax (USD) 190.10

Calculate Sales Tax – rate returned is 10.25

**Sales Order S-ORD101053 · Taxable Customer**

Home Prepare Print/Send Request Approval Order Acumens Customer Rebate Report Acumens e-Tax More options

Validate Address Calculate Sales Tax Exemptions Reset Sales Tax Override Tax Rate API Log Statistics

**Acumens e-Tax**

Ship-to Address Verified  Marketplace

Zip+4 Address Updated  Sales Tax Calculated

Tax Calculation API TAXIAR Sales Tax Errors 0

Tax Liable  Sales Tax % 10.5

Tax Area Code T0123 Report to City 0020

Shipping Taxable  Report to County 0003

Marketplace

**Shipping and Billing** 6/1/2025

Lines Manage Line Order

New Line Delete Line Select items...

Type	No.	Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code	Unit Price Excl. Tax	Cha... Use Tax	Invoice Line No.	Line Discount %	Line Amount Excl. Tax
Item	1906-S	ATHENS Mobile Pedestal	CA1	1			PCS	433.60	<input type="checkbox"/>	0		433.60

Subtotal Excl. Tax (USD) 433.60 Total Excl. Tax (USD) 433.60

Inv. Discount Amount Excl. Tax (USD) 0.00 Total Tax (USD) 45.53

Invoice Discount % 0 Total Incl. Tax (USD) 479.13

To override, use page action "Override Tax Rate"

Sales Order S-ORD101053 · Taxable Customer

Home Prepare Print/Send Request Approval Order Acumens Customer Rebate Report **Acumens e-Tax** More options

Validate Address Calculate SalesTax Exemptions Reset SalesTax **Override Tax Rate** API Log Statistics

**Acumens e-Tax**

Ship-to Address Verified  Marketplace

Zip+4 Address Updated  Sales Tax Calculated

Tax Calculation API TAXIAR Sales Tax Errors 0

Tax Liable  Sales Tax % 10.5

Tax Area Code T0123 Report to City 0020

Shipping Taxable  Report to County 0003

**Shipping and Billing** 6/1/2025

Lines Manage Line Order

New Line Delete Line Select Items...

Type	No.	Description	Location Code	Quantity	City to Assemble to Order	Reserved Quantity	Unit of Measure Code	Unit Price Excl. Tax	Chk. Use Tax	Invoice Line No.	Line Discount %	Line Amount Excl. Tax
Item	1906-S	ATHENS Mobile Pedestal	CA1	1			PCS	433.60	<input type="checkbox"/>	0		433.60

Subtotal Excl. Tax (USD) 433.60 Total Excl. Tax (USD) 433.60

Inv. Discount Amount Excl. Tax (USD) 0.00 Total Tax (USD) 45.53

Invoice Discount % 0 Total Incl. Tax (USD) 479.13

Sales Order S-ORD101053 · Taxa

Home Prepare Print/Send Res

Validate Address Calculate

**Override Tax rate**

**New Tax Rates**

Document Sales CityTax 0.00

StateTax 6.25 SpecialTax 3.25

CountyTax 1.00

Add a City Tax of 0.5%

Sales Order S-ORD101053 · Taxa

Home Prepare Print/Send Res

Validate Address Calculate

**Override Tax rate**

**New Tax Rates**

Document Sales CityTax 0.50

StateTax 6.25 SpecialTax 3.25

CountyTax 1.00

The document rate is updated as below:

**Acumens e-Tax**

Ship-to Address Verified  Marketplace

Zip+4 Address Updated  Sales Tax Calculated

Tax Calculation API TAXIAR Sales Tax Errors 0

Tax Liable  Sales Tax % 11.0

Tax Area Code T0123 Report to City 0020

Shipping Taxable  Report to County 0003

---

**Shipping and Billing** 6/1/2025

Lines Manage Line Order

New Line Delete Line Select Items...

Type	No.	Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code	Unit Price Excl. Tax	Chk. Use Tax	Invoice Line No.	Line Discount %	Line Amount Excl. Tax
Item	1906-S	ATHENS Mobile Pedestal	CA1	1			PCS	433.60	<input type="checkbox"/>	0		433.60

---

Subtotal Excl. Tax (USD)	433.60	Total Excl. Tax (USD)	433.60
Inv. Discount Amount Excl. Tax (USD)	0.00	Total Tax (USD)	47.70
Invoice Discount %	0	Total Incl. Tax (USD)	481.30

Subsequent documents will use the latest defined override tax rate from existing documents.  
 The check sequence is quotes, orders then lastly posted invoices.

## 10. Extended Taxability:

This is a feature where taxability of a product is dependent on whether sold with a resource and vice versa.

### Example: Item Extended Taxability:

The screenshot shows the 'Item Card' for '1969-W · Conference Package 1'. The 'Acumens e-Tax' section is expanded, showing the following settings:

- Tax Group Code: FURNITURE
- Taxability: Non-Taxable with Resource
- Product Taxability: Non-Taxable with Resource
- Resource Filter Type: Resource Code
- Taxability Product Filter: MARTY
- Ship-to State Filter: (empty)

The 'Prices & Sales' section shows a price of 341.80. The 'Replenishment' section shows 'Assembly'. The 'Acumens Vendor Rebate' and 'Acumens Customer Rebates & Claims' sections are empty. The 'Planning' section shows 'None'. The 'Item Tracking' and 'Warehouse' sections are empty.

### Sales Order:

The screenshot shows the 'Sales Order' for 'S-ORD101055 · Taxable Customer'. The 'Acumens e-Tax' section is expanded, showing the following settings:

- Ship-to Address Verified:
- Zip+4 Address Updated:
- Tax Calculation API:
- Tax Liable:
- Tax Area Code: (empty)
- Shipping Taxable:
- Marketplace: (empty)
- Sales Tax Calculated:
- Sales Tax Errors: 0
- Sales Tax %: 0.0
- Report to City: (empty)
- Report to Country: (empty)

The 'Shipping and Billing' section shows the date 6/1/2025.

The 'Lines' section shows the following items:

Type	Description	Location Code	Quantity	Tax Group Code	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code	Unit Price Excl. Tax	Cha... Use Tax	Line Discount %	Line Amount Excl. Tax	Amount Including Tax	Sut
Item	Conference Package 1	CA1	1	FURNITURE			PCS	341.80	<input type="checkbox"/>		341.80	341.80	
Resource	Marty Horst	CA1	1	NTAXP			HOURL	139.00	<input type="checkbox"/>		139.00	139.00	

The 'Totals' section shows the following values:

- Subtotal Excl. Tax (USD): 480.80
- Total Excl. Tax (USD): 480.80
- Inv. Discount Amount Excl. Tax (USD): 0.00
- Total Tax (USD): 0.00
- Invoice Discount %: 0
- Total Incl. Tax (USD): 480.80

## On Calculate Tax:

**Sales Order**  
S-ORD101055 · Taxable Customer

Home Prepare Print/Send Request Approval Order Acumens Customer Rebate Report **Acumens e-Tax** More options

Validate Address Calculate SalesTax Exemptions Reset SalesTax Override Tax Rate API Log Statistics

**Acumens e-Tax** Show more

Ship-to Address Verified  Marketplace

Zip+4 Address Updated  Sales Tax Calculated

Tax Calculation API TAXIAR Sales Tax Errors 0

Tax Liabile  Sales Tax % 10.5

Tax Area Code T0125 Report to City 0020

Shipping Taxable  Report to County 0003

---

**Shipping and Billing** 6/1/2025

Lines Manage Line Order

New Line Delete Line Select Items...

Type	Description	Location Code	Quantity	Tax Group Code	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code	Unit Price Excl. Tax	Ch... Use Tax	Line Discount %	Line Amount Excl. Tax	Amount Including Tax	Sub
Item	Conference Package 1	CA1	1	N TAXP			PCS	341.80	<input type="checkbox"/>		341.80	341.80	
Resource	Marty Horst	CA1	1	N TAXP			HOURL	139.00	<input type="checkbox"/>		139.00	139.00	

Subtotal Excl. Tax (USD) 480.80 480.80 Total Excl. Tax (USD) 480.80

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

Invoice Discount % 0 Total Incl. Tax (USD) 480.80

## Auto-add Resource to Order:

### Resource:

**Resource Card**  
RESOURCE1 · Assembling

Home Resource Report More options

Create Time Sheets...

**General** Person HOUR

**Invoicing** NONTAXABLE SERVICES

**Personal Data**

**Acumens Vendor Rebate**

**Acumens Customer Rebates & Claims**

**Acumens e-Tax**

**Sales Tax**  
Tax Group NONTAXABLE  
Report to Tax Group

**Taxability**  
Resource Taxability Standard  
Product Filter Type Item Category  
Taxability Resource Filter TABLE  
Ship-to State Filter  
Auto-add to Order

## Sales Order:

Dynamics 365 Business Central

Sales Order S-ORD101056 · Taxable Customer

Home Prepare Print/Send Request Approval Order Acumens Customer Rebate Report **Acumens e-Tax** More options

Validate Address **Calculate Sales Tax** Exemptions Reset Sales Tax Override Tax Rate API Log Statistics

**Acumens e-Tax** Show more

Ship-to Address Verified  Tax Exemption Type

Zip+4 Address Updated  Sales Tax Calculated

Tax Calculation API Sales Tax Errors 0

Tax Liable  Sales Tax % 0.0

Tax Area Code Report to City

Shipping Taxable  Report to County

Marketplace

**Shipping and Billing** 6/1/2025

Lines Manage Line Order

New Line Delete Line Select items...

Type	No.	Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code	Unit Price Excl. Tax	Cha... Use Tax	Line Discount %	Line Amount Excl. Tax	Amount Including Tax
Item	1906-S	ATHENS Mobile Pedestal	CA1	1			PCS	433.60	<input type="checkbox"/>		433.60	433.6

Subtotal Excl. Tax (USD) 433.60 Total Excl. Tax (USD) 433.60

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

Invoice Discount % 0 Total Incl. Tax (USD) 433.60

Dynamics 365 Business Central

Sales Order S-ORD101056 · Taxable Customer

Home Prepare Print/Send Request Approval Order Acumens Customer Rebate Report **Acumens e-Tax** More options

Validate Address Calculate Sales Tax Exemptions Reset Sales Tax Override Tax Rate API Log Statistics

**Acumens e-Tax** Show more

Ship-to Address Verified  Tax Exemption Type

Zip+4 Address Updated  Sales Tax Calculated

Tax Calculation API TAXIAR Sales Tax Errors 0

Tax Liable  Sales Tax % 10.5

Tax Area Code T0128 Report to City 0020

Shipping Taxable  Report to County 0003

Marketplace

**Shipping and Billing** 6/1/2025

Lines Manage Line Order

New Line Delete Line Select items...

Type	No.	Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code	Unit Price Excl. Tax	Cha... Use Tax	Line Discount %	Line Amount Excl. Tax	Amount Including Tax
Item	1906-S	ATHENS Mobile Pedestal	CA1	1			PCS	433.60	<input type="checkbox"/>		433.60	479.1
Resource	RESOURCE1	Assembling	CA1	1			HOUR	100.00	<input type="checkbox"/>		100.00	110.5

Subtotal Excl. Tax (USD) 533.60 Total Excl. Tax (USD) 533.60

Inv. Discount Amount Excl. Tax (USD) 0.00 Total Tax (USD) 56.03

Invoice Discount % 0 Total Incl. Tax (USD) 589.63

## 11. Special Tax Rates:

Some Products and Services have special Tax Rates.

Some Products attract partial tax rates while others are taxable or non-taxable based on the Ship-to State.

### 11.1. Retread Tax

This applies to Tire business in California. Tire Retreading is charged Tax on 75% of the Tire Amount.

Tax Group:

Code	Description	Taxiar Tax Code	Zamp Tax Code	Type 1	Farmer	Retread	Mixed Taxability	Disable
NTAXP	Non Taxable Product			Full Tax	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
TAXP	Taxable Product			Full Tax	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
TAXR	Retread Product			Full Tax	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
TAXF	Freight Tax			Shipping Tax	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
TAXS	Service Tax			Service Tax	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ZUSETAX	Zero Use Tax for Products			Zero Product Use Tax	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ZUSETAXSHIP	Zero Use Tax for Shipping			Zero Ship Use Tax	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CRDRFEE	Taxjar-Credit/Debit/Fee/Prepayment			Credit/Debit/Fee/Prepa...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SALESTAX	Sales Tax Lines			Sales Tax	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Sales Order:

Sales Order: S-ORD101068 · USGecoder Customer

Acumens e-Tax

Ship to Address Verified:  Marketplace:

Zip+4 Address Updated:  Sales Tax Calculated:

Tax Calculation API:  Sales Tax Errors: 0

Tax Liable:  Sales Tax %: 0.0

Tax Area Code:  Report to City:

Shipping Taxable:  Report to County:

Shipping and Billing > 6/1/2025

Lines

Type	No.	Item Reference No.	Description	Location Code	Quantity	Tax Group Code	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code	Unit Price Excl. Tax	Cha. Use Tax	Invoice Line No.	Line Discou
Item	1996-5		ATLANTA Whiteboard, base	CA3	1	TAXR			PCS	1,397.30	<input type="checkbox"/>	0	

Subtotal Excl. Tax (USD): 1,397.30 Total Excl. Tax (USD): 1,397.30

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

Invoice Discount %: 0 Total Incl. Tax (USD): 1,397.30

Acumens Customer Rebates & Claims >

On Calculate Tax:

$$\text{Tax for Retread} = (\text{Line Amount} * 0.75) * \text{Tax Rate} = (1397.30 * 0.75) * 8.25\% = 86.46.$$

Dynamics 365 Business Central

Sales Order S-ORD101068 · USGeocoder Customer

Home Prepare Print/Send Request Approval Order Acumens Customer Rebate Report Acumens e-Tax More options

Validate Address Calculate SalesTax Exemptions Reset SalesTax Override Tax Rate API Log Statistics

**Acumens e-Tax** Show more

Ship-to Address Verified  Marketplace

Zip+4 Address Updated  Sales Tax Calculated

Tax Calculation API  Sales Tax Errors

Tax Liable  Sales Tax %

Tax Area Code  Report to City

Shipping Taxable  Report to County

**Shipping and Billing** 6/1/2025

Lines Manage Line Order

New Line Delete Line Select Items...

Type	No.	Item Reference No.	Description	Location Code	Quantity	Tax Group Code	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code	Unit Price Excl. Tax	Chk. Use Tax	Invoice Line No.	Line Discou
→ Item		1996-S	ATLANTA Whiteboard, base	CA3	1	JAXS			PCS	1,397.30	<input type="checkbox"/>	0	
Subtotal Excl. Tax (USD)					1,397.30	Total Excl. Tax (USD)					1,397.30		
Inv. Discount Amount Excl. Tax (USD)					0.00	Total Tax (USD)					86.46		
Invoice Discount %					0	Total Incl. Tax (USD)					1,483.76		

**Acumens Customer Rebates & Claims**

## 11.2. California Farmers

California Farmers get a 5% subsidy on State Tax.

This feature is supported by USGeocoder and ZipTax API only.

Sales Order:

Sales Order S-ORD101050 · USGecoder Customer

Home Prepare Print/Send Request Approval Order Acumens Customer Rebate Report **Acumens e-Tax** More options

Validate Address **Calculate Sales Tax** Exemptions Reset Sales Tax Override Tax Rate API Log Statistics

**Acumens e-Tax** Show more

Ship-to Address Verified  Marketplace   
 Zip+4 Address Updated  Sales Tax Calculated   
 Tax Calculation API  Sales Tax Errors 0  
 Tax Liable  Sales Tax % 0.0  
 Tax Area Code  Report to City   
 Shipping Taxable  Report to County

**Shipping and Billing** 6/1/2025

Lines Manage Line Order

New Line Delete Line Select Items...

Type	No.	Description	Location Code	Quantity	Tax Group Code	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code	Unit Price Excl. Tax	Ch... Use Tax	Invoice Line No.	Line Discount %
Item	1908-S	LONDON Swivel Chair, blue	CA3	1	FURNITURE			PCS	190.10	<input type="checkbox"/>	0	

Subtotal Excl. Tax (USD) 190.10 Total Excl. Tax (USD) 190.10  
 Inv. Discount Amount Excl. Tax (USD) 0.00 Total Tax (USD) 0.00  
 Invoice Discount % 0 Total Incl. Tax (USD) 190.10

On Calculate Tax:

Before Farming Exemption is enabled:

Sales Order S-ORD101050 · USGecoder Customer

Home Prepare Print/Send Request Approval Order Acumens Customer Rebate Report **Acumens e-Tax** More options

Validate Address **Calculate Sales Tax** Exemptions Reset Sales Tax Override Tax Rate API Log Statistics

**Acumens e-Tax** Show more

Ship-to Address Verified  Marketplace   
 Zip+4 Address Updated  Sales Tax Calculated   
 Tax Calculation API  Sales Tax Errors 0  
 Tax Liable  Sales Tax % 8.25  
 Tax Area Code T0116 Report to City 0002  
 Shipping Taxable  Report to County 0001

**Shipping and Billing** 6/1/2025

Lines Manage Line Order

New Line Delete Line Select Items...

Type	No.	Description	Location Code	Quantity	Tax Group Code	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code	Unit Price Excl. Tax	Ch... Use Tax	Invoice Line No.	Line Discount %
Item	1908-S	LONDON Swivel Chair, blue	CA3	1	FURNITURE			PCS	190.10	<input type="checkbox"/>	0	

Subtotal Excl. Tax (USD) 190.10 Total Excl. Tax (USD) 190.10  
 Inv. Discount Amount Excl. Tax (USD) 0.00 Total Tax (USD) 15.68  
 Invoice Discount % 0 Total Incl. Tax (USD) 205.78

When Farming Exemption is enabled:

The screenshot shows the Dynamics 365 Business Central interface for a Sales Order (S-ORD101050) for a USGecoder Customer. The 'Acumens e-Tax' section is active, showing various tax-related settings. The 'Sales Tax %' field is highlighted with a red box and contains the value 3.25. Below this, the 'Shipping and Billing' section is visible, followed by a table of lines and a summary table.

Type	No.	Description	Location Code	Quantity	Tax Group Code	City, to Assemble to Order	Reserved Quantity	Unit of Measure Code	Unit Price Excl. Tax	Chk... Use Tax	Invoice Line No.	Line Discount %
→ Item	1908-S	LONDON Swivel Chair, blue	CAS	1	FURNITURE			PCS	190.10	<input type="checkbox"/>	0	

Subtotal Excl. Tax (USD)	190.10	Total Excl. Tax (USD)	190.10
Inv. Discount Amount Excl. Tax (USD)	0.00	Total Tax (USD)	6.18
Invoice Discount %	0	Total Incl. Tax (USD)	196.28

### 11.3. Shipping Tax

Shipping Tax has different taxability's based on State e.g. Shipping is not Taxable in California but Taxable in Hawaii.

Sales Order for CA:

Sales Order S-ORD101074 · Taxable Customer

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

Validate Address **Calculate Sales Tax** Exemptions Reset Sales Tax Override Tax Rate API Log Statistics

**Acumens e-Tax** Show less

Address Verify API Smartly Address Verify API Marketplace  
 Sell-to Address Verified Tax Exemption No.  
 Ship-to Address Verified Tax Exemption Type  
 Bill-to Address Verified Sales Tax Calculated   
 Zip+4 Address Updated Sales Tax Errors 0  
 Tax Calculation API Sales Tax % 0.0  
 Tax Liable Created on Taxlar  
 Tax Area Code T0148 Report to City  
 Shipping Taxable Report to County  
 Charge Use Tax

**Shipping and Billing** 2/19/2026

Lines Manage Line Order

New Line Delete Line Select items...

Type	Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code	Unit Price Excl. Tax	Cha... Use Tax	Line Discount %	Line Amount Excl. Tax	Amount Including Tax	Subscription Lines	Custom Subst. Control
Item	ATHENS Desk	CA1	1			PCS	1,000.80			1,000.80	1,105.88	0	
→ Charge (Item)	Freight Charge (IB-Spedition)	CA1	1				67.00			67.00	67.00	0	

On Calculate Tax, Line 1 is Taxed whereas Line 2 for Shipping is not:

Sales Order S-ORD101074 · Taxable Customer

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

Validate Address Calculate Sales Tax Exemptions Reset Sales Tax Override Tax Rate API Log Statistics

**Acumens e-Tax** Show less

Address Verify API Smartly Address Verify API Marketplace  
 Sell-to Address Verified Tax Exemption No.  
 Ship-to Address Verified Tax Exemption Type  
 Bill-to Address Verified Sales Tax Calculated   
 Zip+4 Address Updated Sales Tax Errors 0  
 Tax Calculation API TAXJAR01 Sales Tax % 10.5  
 Tax Liable Created on Taxlar  
 Tax Area Code T0182 Report to City 0020  
 Shipping Taxable Report to County 0003  
 Charge Use Tax

**Shipping and Billing** 2/19/2026

Lines Manage Line Order

New Line Delete Line Select items...

Type	Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code	Unit Price Excl. Tax	Cha... Use Tax	Line Discount %	Line Amount Excl. Tax	Amount Including Tax	Subscription Lines	Custom Subst. Control
Item	ATHENS Desk	CA1	1			PCS	1,000.80			1,000.80	1,105.88	0	
→ Charge (Item)	Freight Charge (IB-Spedition)	CA1	1				67.00			67.00	67.00	0	

Sales Order for HI:

Sales Order S-ORD101075 · TaxJar Customer

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

Validate Address **Calculate Sales Tax** Exemptions Reset Sales Tax Override Tax Rate API Log Statistics

**Acumens e-Tax** Show less

Address Verify API Smartly Address Verify API Marketplace  
 Sell-to Address Verified Tax Exemption No.  
 Ship-to Address Verified Tax Exemption Type  
 Bill-to Address Verified Sales Tax Calculated   
 Zip+4 Address Updated Sales Tax Errors 0  
 Tax Calculation API Sales Tax % 0.0  
 Tax Liable Created on TaxJar  
 Tax Area Code Report to City  
 Shipping Taxable Report to County  
 Charge Use Tax

**Shipping and Billing** HI 2/19/2026

Lines Manage Line Order

New Line Delete Line Select items...

Type	Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code	Unit Price Excl. Tax	Cha... Use Tax	Line Discount %	Line Amount Excl. Tax	Amount Including Tax	Subscription Lines	Custom Subst. Control
Item	ATHENS Desk	HI1	1			PCS	1,000.80	<input type="checkbox"/>		1,000.80	1,000.80	0	
→ Charge (Item)	Freight Charge (IB-Spedition)	HI1	1				76.00	<input type="checkbox"/>		76.00	76.00	0	

On Calculate Tax, Shipping Line is also Taxed.

Sales Order S-ORD101075 · TaxJar Customer

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

Validate Address Calculate Sales Tax Exemptions Reset Sales Tax Override Tax Rate API Log Statistics

**Acumens e-Tax** Show less

Address Verify API Smartly Address Verify API Marketplace  
 Sell-to Address Verified Tax Exemption No.  
 Ship-to Address Verified Tax Exemption Type  
 Bill-to Address Verified Sales Tax Calculated   
 Zip+4 Address Updated Sales Tax Errors 0  
 Tax Calculation API TAXJAR01 Sales Tax % 4.712  
 Tax Liable Created on TaxJar  
 Tax Area Code T0185 Report to City  
 Shipping Taxable Report to County  
 Charge Use Tax

**Shipping and Billing** HI 2/19/2026

Lines Manage Line Order

New Line Delete Line Select items...

Type	Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code	Unit Price Excl. Tax	Cha... Use Tax	Line Discount %	Line Amount Excl. Tax	Amount Including Tax	Subscription Lines	Custom Subst. Control
Item	ATHENS Desk	HI1	1			PCS	1,000.80	<input type="checkbox"/>		1,000.80	1,047.96	0	
→ Charge (Item)	Freight Charge (IB-Spedition)	HI1	1				76.00	<input type="checkbox"/>		76.00	79.58	0	

## 11.4. Service Tax:

Different services vary in Taxability in States.

Service Sales Order for CA:

The screenshot shows the 'Acumens e-Tax' section of a sales order. The 'Sales Tax Calculated' toggle is turned off (indicated by a red box around the off switch). The 'Sales Tax Errors' field shows 0, and 'Sales Tax %' is 0.0. The 'Total Tax (USD)' field at the bottom right is highlighted with a red box and shows 0.00.

Type	No.	Description	Location Code	Quantity	City to Assemble to Order	Reserved Quantity	Unit of Measure Code	Unit Price Excl. Tax	Chg. Use Tax	Line Discount %	Line Amount Excl. Tax	Amount Including Tax
Item	1000	D365 Business Central Consultat...	CA1	1			HOUR	99.00	<input type="checkbox"/>		99.00	99.00

Subtotal Excl. Tax (USD)	99.00	Total Excl. Tax (USD)	99.00
Inv. Discount Amount Excl. Tax (USD)	0.00	Total Tax (USD)	0.00
Invoice Discount %	0	Total Incl. Tax (USD)	99.00

On Calculate Tax, the service line is not taxable:

The screenshot shows the 'Acumens e-Tax' section of a sales order. The 'Sales Tax Calculated' toggle is turned on (indicated by a red box around the on switch). The 'Sales Tax Errors' field shows 0, and 'Sales Tax %' is 8.25. The 'Total Tax (USD)' field at the bottom right is highlighted with a red box and shows 0.00.

Type	No.	Description	Location Code	Quantity	City to Assemble to Order	Reserved Quantity	Unit of Measure Code	Unit Price Excl. Tax	Chg. Use Tax	Line Discount %	Line Amount Excl. Tax	Amount Including Tax
Item	1000	D365 Business Central Consultat...	CA1	1			HOUR	99.00	<input type="checkbox"/>		99.00	99.00

Subtotal Excl. Tax (USD)	99.00	Total Excl. Tax (USD)	99.00
Inv. Discount Amount Excl. Tax (USD)	0.00	Total Tax (USD)	0.00
Invoice Discount %	0	Total Incl. Tax (USD)	99.00

# Service Sales Order for HI

Dynamics 365 Business Central

Sales Order S-ORD101077 · TaxJar Customer

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

Validate Address **Calculate Sales Tax** Exemptions Reset Sales Tax Override Tax Rate API Log Statistics

**Acumens e-Tax** Show more

Ship-to Address Verified  Marketplace

Zip+4 Address Updated  Sales Tax Calculated

Tax Calculation API  Sales Tax Errors 0

Tax Liable  Sales Tax % 0.0

Tax Area Code  Report to City

Shipping Taxable  Report to County

**Shipping and Billing** HI 2/19/2025

Lines Manage Line Order

New Line Delete Line Select Items...

Type	No.	Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code	Unit Price Excl. Tax	Chk. Use Tax	Line Discount %	Line Amount Excl. Tax	Amount Including Tax
Item	1000	D365 Business Central Consultat...	HI1	1			HOUR	88.00	<input type="checkbox"/>		88.00	88.00

Subtotal Excl. Tax (USD) 88.00 Total Excl. Tax (USD) 88.00

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

Invoice Discount % 0 Total Incl. Tax (USD) 88.00

On Calculate Tax, the service is taxable:

Dynamics 365 Business Central

Sales Order S-ORD101077 · TaxJar Customer

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

Validate Address Calculate Sales Tax Exemptions Reset Sales Tax Override Tax Rate API Log Statistics

**Acumens e-Tax** Show more

Ship-to Address Verified  Tax Exemption Type

Zip+4 Address Updated  Sales Tax Calculated

Tax Calculation API TAXJAR01 Sales Tax Errors 0

Tax Liable  Sales Tax % 4.712

Tax Area Code T0194 Report to City 0015

Shipping Taxable  Report to County 0004

Marketplace

**Shipping and Billing** HI 2/19/2025

Lines Manage Line Order

New Line Delete Line Select Items...

Type	No.	Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code	Unit Price Excl. Tax	Chk. Use Tax	Line Discount %	Line Amount Excl. Tax	Amount Including Tax
Item	1000	D365 Business Central Consultat...	HI1	1			HOUR	88.00	<input type="checkbox"/>		88.00	92.1

Subtotal Excl. Tax (USD) 88.00 Total Excl. Tax (USD) 88.00

Inv. Discount Amount Excl. Tax (USD) 0.00 Total Tax (USD) 4.15

Invoice Discount % 0 Total Incl. Tax (USD) 92.15

## 12. Credit Sales Tax:

This feature is used to process sales tax correction through a Credit Memo when Sales Tax on the Invoice was processed incorrectly.

Posted Sales Invoice to correct:

Dynamics 365 Business Central

Posted Sales Invoice  
PS-INV103048 · TaxJar Customer

Home | Posting | Approve | Incoming Document | Order | Acumens e-Tax | Related | Fewer options

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

**Acumens e-Tax**

Tax Calculation API: TAXJAR01 | Posted Tax Area Code: PT0048  
 Tax Liabile:  | Created on Taxjar:   
 Tax Area Code: E-TAX | Created on Zamp:   
 Shipping is Taxable:  | Report to City: 0002  
 Sales Tax Errors: 0 | Report to County: 0001  
 Tax Exemption Type: | Unincorporated City:   
 Tax Exemption No.: | Taxability Override:   
 Charge Use Tax:  | Update Sales Tax Entry:   
 Sales Tax Rate: 8.25 | Update Tax Rates:   
 Tax Reporting API: TAXJAR01

**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 Group Code	TaxGroup	Taxability Override
Item	1896-S		ATHENS Desk	1	PSC	1,000.80	E-TAX	FURNITURE	FURNITURE	

Invoice Discount Amount Excl. Tax: 0.00 | Total Tax (USD): 82.57  
 Total Excl. Tax (USD): 1,000.80 | Total Incl. Tax (USD): 1,083.37

Sales Credit Memo:

Dynamics 365 Business Central

Sales Credit Memo  
S-CR1003 · TaxJar Customer

Home | Prepare | Request Approval | Credit Memo | Acumens Customer Rebate | Acumens e-Tax | More options

Post | Release | Apply Entries...

**Acumens e-Tax**

**Return-from Address**

Original Posted Invoice No.: PS-INV103048 | Return-from City: Mountain Mesa  
 Return-from Code: CA | Return-from State: CA  
 Return-from Name: TaxJar Customer | Return-from Post Code: 93240-9748  
 Return-from Address: 3304 COOK PEAK RD | Return-from Country/Region Code: US  
 Return-from Address 2: | Return-from Contact:

**Lines** | Manage | Functions | Line

Insert Ext. Text | Dimensions | Deferral Schedule | Redistribute Account Allocations | Generate lines from...ation Account Line | New Line | Delete Line

Type	No.	Item Reference No.	Description	Location Code	Quantity	Unit of Measure Code	Unit Price Excl. Tax	Cha. Use Tax	Invoice Line No.	Line Amount Excl. Tax	Amount Including Tax	Line Discount %	Qty. to Ass
G/L Account	23100		Sales Tax Liabile	CA1	1		20.00	<input type="checkbox"/>	0	20.00	20.00		

Subtotal Excl. Tax (USD): 20.00 | Total Excl. Tax (USD): 20.00  
 Inv. Discount Amount Excl. Tax (USD): 0.00 | Total Tax (USD): 0.00  
 Invoice Discount %: 0 | Total Incl. Tax (USD): 20.00

On Calculate Tax:

The line does not add tax.

Sales Credit Memo  
S-CR1003 · TaxJar Customer

Home Prepare Request Approval Credit Memo Acumens Customer Rebate **Acumens e-Tax** More options

Validate Address Calculate SalesTax Reset SalesTax Override Tax Rate API Log Statistics

**Acumens e-Tax** Show more

Ship-to Address Verified  Marketplace   
Zip+4 Address Updated  Sales Tax Calculated   
Tax Calculation API  Sales Tax Errors 0  
Tax Liable  Sales Tax % 8.25  
Tax Area Code T0232 Report to City 0002  
Shipping Taxable  Report to County 0001  
Exact Tax Reversing

Return-from Address > TaxJar Customer

Lines Manage Functions Line

Insert Ext. Text Dimensions Deferral Schedule Redistribute Account Allocations Generate lines from...ation Account Line **New Line** Delete Line

Type	No.	Item Reference No.	Description	Location Code	Quantity	Unit of Measure Code	Unit Price Excl. Tax	Cha... Use Tax	Invoice Line No.	Line Amount Excl. Tax	Amount Including Tax	Line Discount %	Qty. to Ais
G/L Account	23100		Sales Tax Liable	CA1	1		20.00	<input type="checkbox"/>	0	20.00	20.00		

Subtotal Excl. Tax (USD) 20.00 Total Excl. Tax (USD) 20.00  
Inv. Discount Amount Excl. Tax (USD) 0.00 Total Tax (USD) 0.00  
Invoice Discount % 0 Total Incl. Tax (USD) 20.00

Posted Sales Credit Memo:

Posted Sales Credit Memo  
PS-CR104002 · TaxJar Customer

Home Prepare Approve Incoming Document Acumens e-Tax Related Fewer options

**Acumens e-Tax**

Tax Calculation API Tax Reporting API  
Original Posted Invoice No. PS-INV103048 Sales Tax Rate 8.25  
Tax Liable  Posted Tax Area Code PT0057  
Tax Area Code E-TAX Created on TaxJar   
Tax Liable  Created on Zamp   
Shipping is Taxable  Report to City 0002  
Tax Area Code E-TAX Report to County 0001  
Sales Tax Errors 0 Unincorporated City   
Tax Exemption Type Taxability Override   
Tax Exemption No. Update Sales Tax Entry   
Charge Use Tax  Update Tax Rates

Lines Manage Line

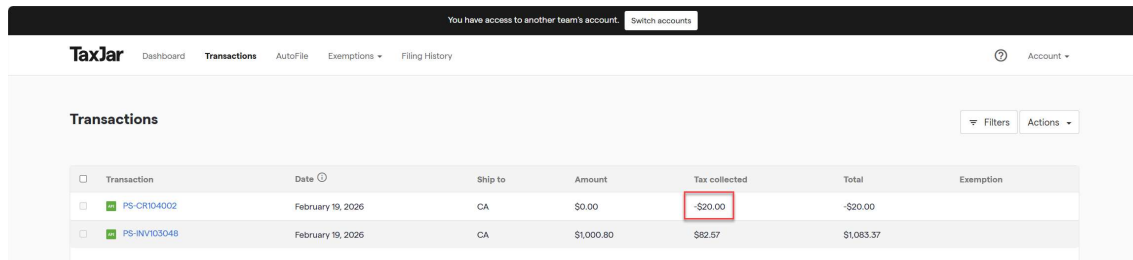
Deferral Schedule **New Line** Delete Line

Type	No.	Item Reference No.	Description	Return Reason Code	Quantity	Unit of Measure Code	Unit Cost (\$)	Unit Price Excl. Tax	Tax Area Code	Tax Group Code	TaxGroup	Taxability Override
G/L Account	23100		Sales Tax Liable		1		0.00	20.00	E-TAX	SALESTAX	SALESTAX	

Invoice Discount Amount Excl. Tax 0.00 Total Tax (USD) 0.00  
Total Excl. Tax (USD) 20.00 Total Incl. Tax (USD) 20.00

## Sales Tax Reporting for Credit Sales Tax:

### API Upload e.g. TaxJar:

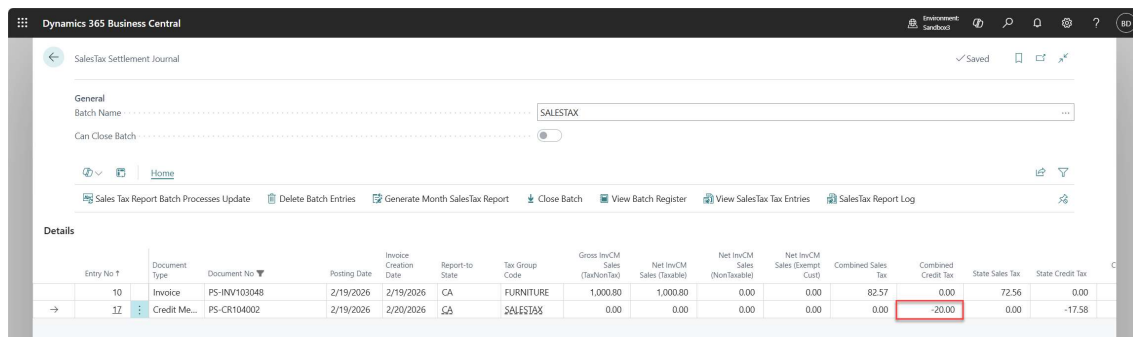


The screenshot shows the TaxJar interface with a table of transactions. The 'Tax collected' column for the first transaction (PS-CR104002) is highlighted with a red box and shows a negative value of -\$20.00.

Transaction	Date	Ship to	Amount	Tax collected	Total	Exemption
PS-CR104002	February 19, 2026	CA	\$0.00	-\$20.00	-\$20.00	
PS-INV103048	February 19, 2026	CA	\$1,000.80	\$82.57	\$1,083.37	

### Manual Reporting:

The Amount is reported as full tax:



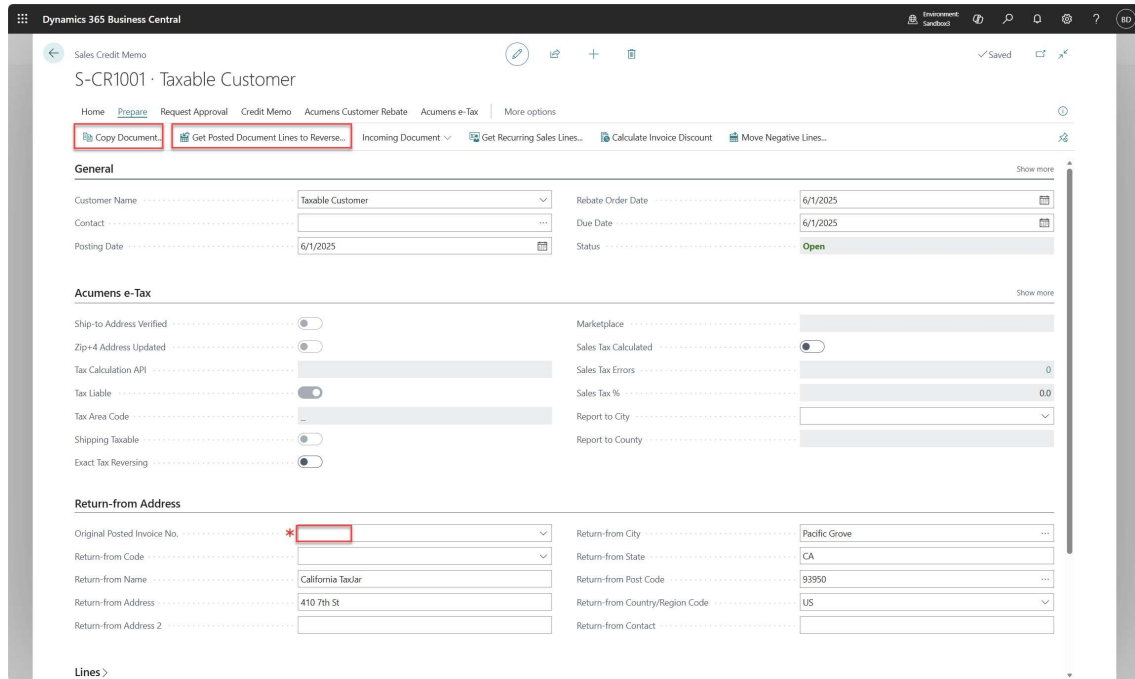
The screenshot shows the Dynamics 365 Business Central interface for a SalesTax Settlement Journal. The 'Batch Name' is 'SALESTAX'. The 'Details' table shows a credit memo entry (Entry No 17) with a negative 'Combined Credit Tax' value of -20.00, highlighted with a red box.

Entry No	Document Type	Document No	Posting Date	Invoice Creation Date	Report to State	Tax Group Code	Gross Inv/CM Sales (Tax/NonTax)	Net Inv/CM Sales (Taxable)	Net Inv/CM Sales (NonTaxable)	Net Inv/CM Sales (Exempt Cust)	Combined Sales Tax	Combined Credit Tax	State Sales Tax	State Credit Tax
10	Invoice	PS-INV103048	2/19/2026	2/19/2026	CA	FURNITURE	1,000.80	1,000.80	0.00	0.00	82.57	0.00	72.56	0.00
17	Credit Me...	PS-CR104002	2/19/2026	2/20/2026	CA	SALESTAX	0.00	0.00	0.00	0.00	0.00	-20.00	0.00	-17.58

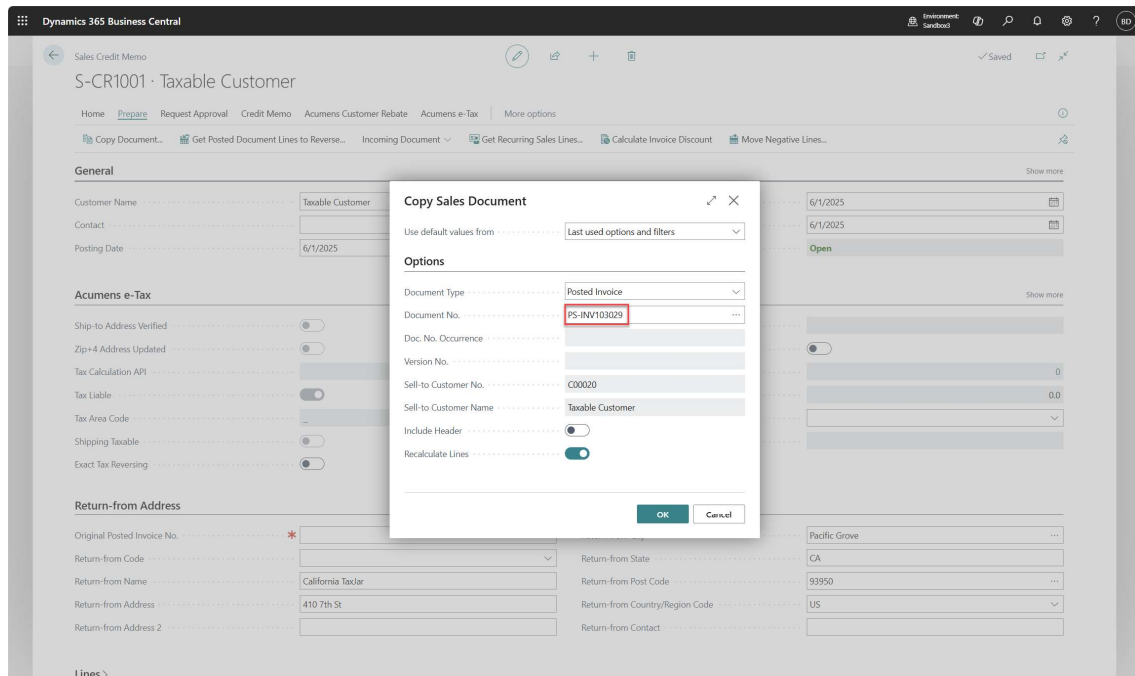
### 13. Exact Tax Reversal

This feature is applicable to Sales Returns to ensure that the Tax Amount for the return is exact as the tax amount for the sale.

This feature is dependent on the field “Original Posted Invoice No” which can be updated manually or through Page Actions “Copy Document” and “Get Posted Document Lines to Reverse”



### Copy Document



Dynamics 365 Business Central

Sales Credit Memo

S-CR1001 · Taxable Customer

Home Prepare Request Approval Credit Memo Acumens Customer Rebate Acumens e-Tax More options

Copy Document... Get Posted Document Lines to Reverse... Incoming Document Get Recurring Sales Lines... Calculate Invoice Discount Move Negative Lines...

**Acumens e-Tax** Show more

Ship-to Address Verified  Marketplace

Zip+4 Address Updated  Sales Tax Calculated

Tax Calculation API Sales Tax Errors 0

Tax Liable  Sales Tax % 0.0

Tax Area Code Report to City 0020

Shipping Taxable  Report to County 0003

Exact Tax Reversing

**Return-from Address**

Original Posted Invoice No. PS-INV103029 Return-from City West Hollywood

Return-from Code Return-from State CA

Return-from Name Taxable Customer Return-from Post Code 90069-2104

Return-from Address 8833 W Sunset Blvd Return-from Country/Region Code US

Return-from Address 2 Return-from Contact

**Lines**

**Acumens Customer Rebates & Claims**

**Credit Memo Details** 1M8D Yes

Billina Taxable Customer

Posted Sales Invoice Tax Rate:

Dynamics 365 Business Central

Posted Sales Invoice

PS-INV103029 · Taxable Customer

Home Posting Approve Incoming Document Order Acumens e-Tax More options

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

**General** PS-INV 03029 Taxable Customer 7/1/2023 5-ORD 10 1056 NO

**Acumens e-Tax**

Tax Calculation API TAXIAR Tax Reporting API

Tax Liable  Posted Tax Area Code PT0028

Shipping is Taxable  Created on Taxjar

Tax Area Code E-TAX Created on Zamp

SalesTax Errors 0 Report to City 0020

Marketplace Report to County 0003

Tax Exemption Type Unincorporated City

Tax Exemption No. Taxability Override

Charge Use Tax  Update SalesTax Entry

SalesTax Rate 105 UpdateTaxRates

# On Calculate Tax:

Dynamics 365 Business Central

Sales Credit Memo

S-CR1001 · Taxable Customer

Home Prepare Request Approval Credit Memo Acumens Customer Rebate **Acumens e-Tax** More options

Validate Address Calculate Sales Tax Reset Sales Tax Override Tax Rate API Log Statistics

**General** > Taxable Customer 6/11/2025 6/11/2025 Open

**Acumens e-Tax** Show more

Ship-to Address Verified  Marketplace

Zip+4 Address Updated  Sales Tax Calculated

Tax Calculation API  Sales Tax Errors 0

Tax Liable  Sales Tax % 10.5

Tax Area Code T0131 Report to City 0020

Shipping Taxable  Report to County 0003

Exact Tax Reversing

**Return-from Address** > Taxable Customer

Lines Manage Functions Line

Insert Ext. Text Dimensions Deferral Schedule Redistribute Account Allocations Generate lines from...ation Account Line New Line Delete Line

Type	No.	Item Reference No.	Description	Location Code	Quantity	Unit of Measure Code	Unit Price Excl. Tax	Cha. Use Tax	Invoice Line No.	Line Amount Excl. Tax	Amount Including Tax	Line Discount %	Qty. to Ass
Comment	*		Invoice No. PS-INV103029:					<input type="checkbox"/>	0		0.00		
Item	1906-S		ATHENS Mobile Pedestal	CA1	1	PCS	433.60	<input type="checkbox"/>	0	433.60	479.13		
Resource	RESOURCE1		Assembling	CA1	1	HOURL	100.00	<input type="checkbox"/>	0	100.00	110.50		

# 14. Posted Documents Sales Tax Related Updates:

Acumens e-Tax allows for update on the following fields on posted documents:

## Posted Sales Invoice

The screenshot shows the Dynamics 365 Business Central interface for a Posted Sales Invoice (PS-INV103036) for a USGecoder Customer. The 'Acumens e-Tax' tab is active, and the 'Update Sales Tax & Ship-to Info' button is highlighted with a red box. A dialog box titled 'Update Invoice Sales Tax & Ship-to Info' is open, displaying the following details:

SalesTax Updates		Address Updates	
MarketPlace	<input type="text"/>	Address	3304 Croch Peak Rd
CreatedonTaxJar	<input type="checkbox"/>	City	MOUNTAIN MESA
SalesTaxRate	8.25	State	CA
Taxable	<input checked="" type="checkbox"/>	PostalCode	93240
		CountryCode	US

The dialog box also includes a 'Close' button. Below the dialog, the 'Lines' section shows a table with one line item:

Type	No.	Item Reference No.	Description	Quantity	Unit of Measure Code	Unit Price Excl. Tax	Tax Area Code	Tax Group Code	TaxGroup	Toxicity Override
Item		1930-S	ANTWERP Conference Table	1	PSS	647.80	E-TAX	FURNITURE	FURNITURE	Non-Taxable

At the bottom, the invoice summary shows: Invoice Discount Amount Excl. Tax: 0.00, Total Tax (USD): 53.44.

## Posted Sales Cr. Memos

The screenshot shows the Dynamics 365 Business Central interface for a Posted Sales Credit Memo (PS-CR104001) for a Taxable Customer. The 'Acumens e-Tax' tab is active, and the 'Update Sales Tax & Return-from Info' button is highlighted with a red box.



# 15. Sales Tax Reporting

In Acumens e-Tax, Sales Tax Reporting can be done manually with an excel report output or API Uploads:

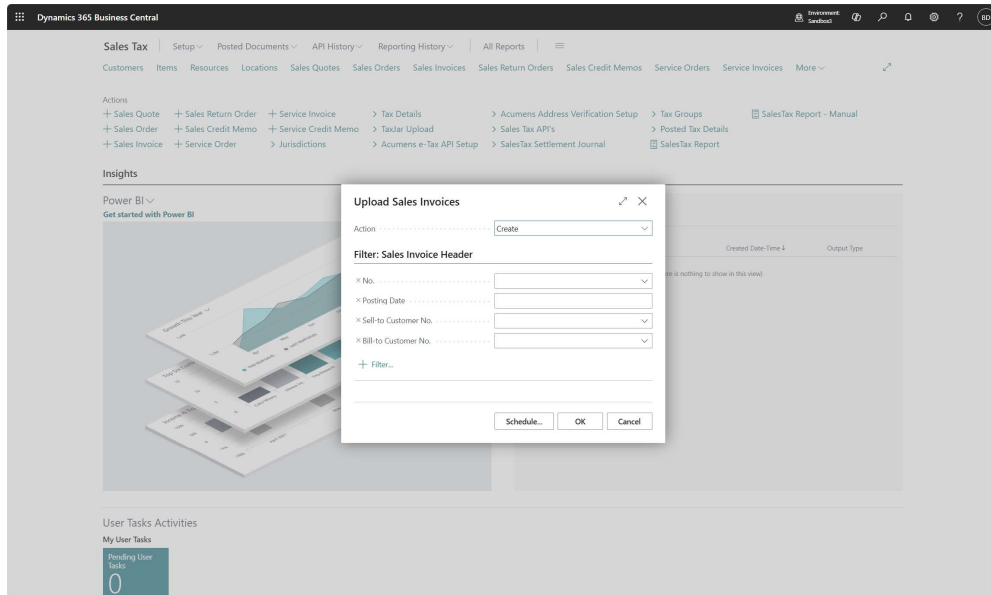
## 15.1. API Upload:

TaxJar and Zamp support Posted Sales Documents upload where they file on behalf of the Client.

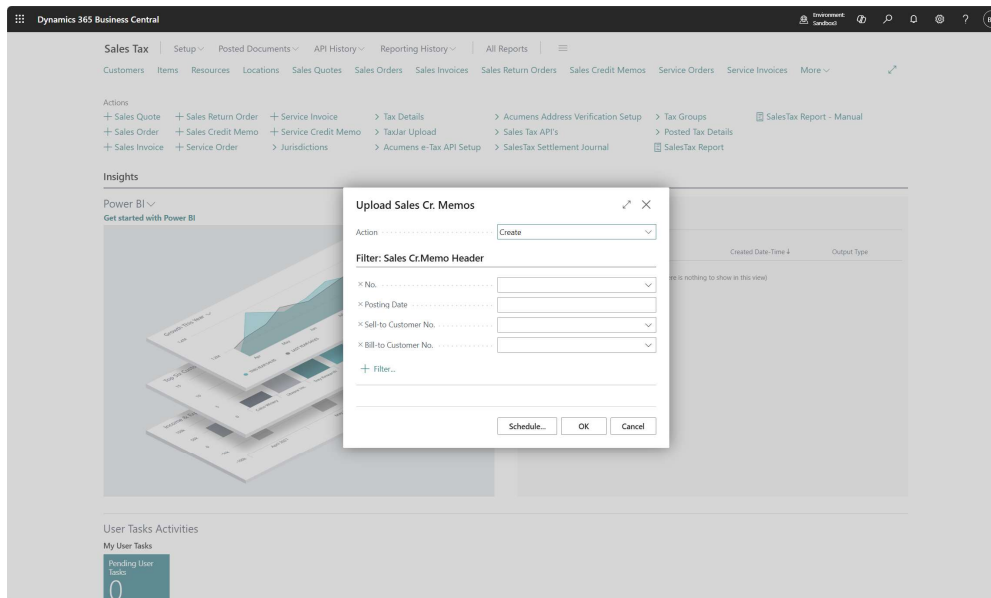
The Upload is based on the Reporting API for the Sales Document:

Below Reports are used to upload:

### i. Upload Sales Invoices



### ii. Upload Sales Cr Memos



Upload samples:

TaxJar:

The screenshot shows the 'Acumens e-Tax' configuration page in Dynamics 365 Business Central. The page title is 'PS-INV103034 · TaxJar Customer'. The configuration includes various fields for tax calculation and reporting, such as 'Tax Calculation API' (TAXJAR01), 'Tax Reporting API' (TAXJAR01), 'Taxable' (checked), 'Tax Area Code' (E-TAX), and 'Sales Tax Rate' (8.25%). A table below shows the invoice line details:

Type	No.	Item reference No.	Description	Quantity	Unit of Measure Code	UNIT PRICE EXCL. Tax	Tax Area Code	Tax Group Code	TaxGroup	Taxability Override
Item	1900		PARIS Guest Chair, black	1	PCS	192.80	E-TAX	FURNITURE	FURNITURE	

Summary values at the bottom:

Invoice Discount Amount Excl. Tax	0.00	Total Tax (USD)	15.91
Total Excl. Tax (USD)	192.80	Total Incl. Tax (USD)	208.71

TaxJar portal

The screenshot shows the TaxJar portal interface. At the top, there is a navigation bar with 'Dashboard', 'Transactions', 'AutoFile', 'Exemptions', and 'Filing History'. The 'Transactions' section is active, displaying a table of transactions:

Transaction	Date	Ship to	Amount	Tax collected	Total	Exemption
PS-INV103034	June 1, 2025	CA	\$192.80	\$15.91	\$208.71	

## Zamp:

Dynamics 365 Business Central

Posted Sales Invoice

PS-INV103035 · Zamp Customer

Home Posting Approve Incoming Document Order Acumens e-Tax More options

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

### Acumens e-Tax

Tax Calculation API	ZAMP01	Tax Reporting API	ZAMP01
Tax Liabile	<input type="checkbox"/>	Posted Tax Area Code	PT0034
Shipping is Taxable	<input type="checkbox"/>	Created on TaxJar	<input type="checkbox"/>
Tax Area Code	E-TAX	Created on Zamp	<input type="checkbox"/>
SalesTax Errors	0	Report to City	
Marketplace		Report to County	
Tax Exemption Type		Unincorporated City	<input type="checkbox"/>
Tax Exemption No.		Taxability Override	<input type="checkbox"/>
Charge Use Tax	<input type="checkbox"/>	Update SalesTax Entry	<input type="checkbox"/>
SalesTax Rate	8.25	UpdateTaxRates	<input type="checkbox"/>

Type	No.	Item Reference No.	Description	Quantity	Unit of Measure Code	Unit Price Excl. Tax	Tax Area Code	Tax Group Code	TaxGroup	Taxability Override
Item	1899-S		ATHENS Desk	1	PCS	1,000.80	E-TAX	FURNITURE	FURNITURE	

Invoice Discount Amount Excl. Tax	0.00	Total Tax (USD)	82.57
Total Excl. Tax (USD)	1,000.80	Total Incl. Tax (USD)	1,083.37

## Zamp Portal

This is a test account

### Transactions

Export Transactions

Transactions	1	Taxes Collected	\$82.57	Total Value	\$1,083.37
--------------	---	-----------------	---------	-------------	------------

Reported on: Jun 01, 2025 → Jun 30, 2025 | Timezone: US/Local | Country: US X | Add filter + | Clear filters

ID	Integration	Date (UTC)	Marketplace	Entity/Purpose	Ship-To: Region	Currency	Tax Collected	Total
PS-INV103035	API	06/01/2025 7:00 AM	-	-	California	USD	\$82.57	\$1,083.37

1 transaction

Previous Next

## 15.2. Manual Reporting:

Manual SalesTax Report can be done for all documents including the ones that have been processed with an API that does support upload for filing or for the ones that were processed with an API that does not support uploads for filing.

To process Manual Excel Report Export, use Sales Tax Settlement Journal.

Default template and batch are created on Acumens e-tax Setup Launch but users can create separate batches especially when there is need to separate different state reports.

The screenshot shows the Dynamics 365 Business Central interface. The top navigation bar includes 'Sales Tax' and various menu items. The 'Sales Tax Settlement Journal' is highlighted in the navigation pane. Below, the 'SalesTax Settlement Journal' form is displayed with the following details:

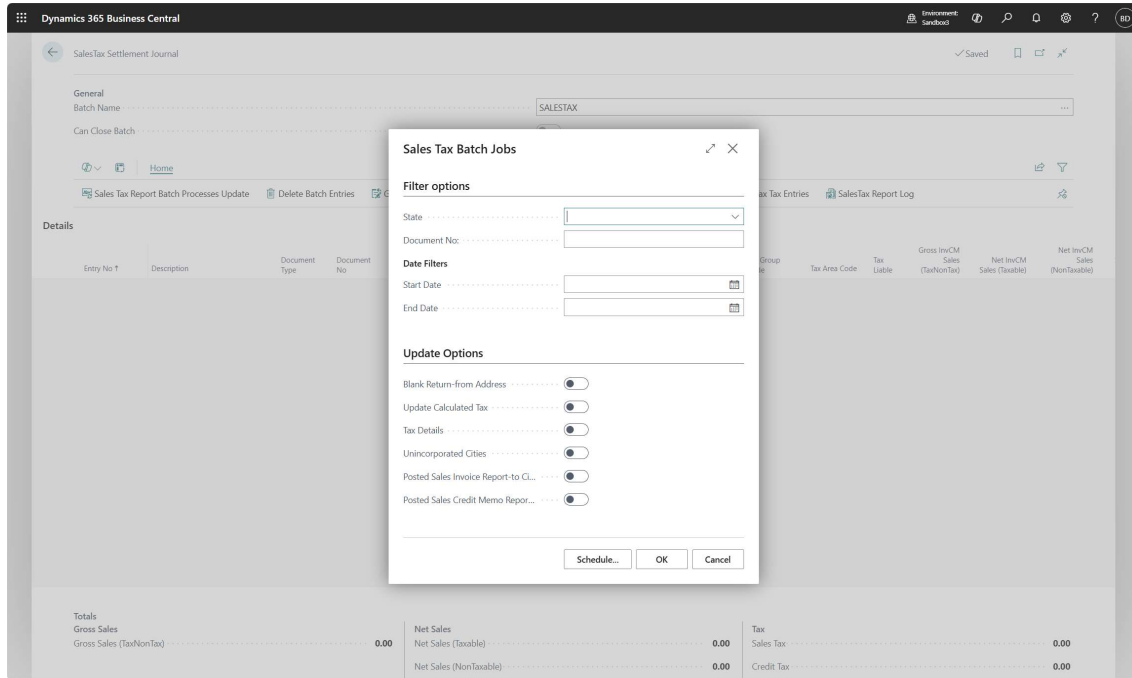
- General**
  - Batch Name: SALESTAX
  - Can Close Batch:
- Details**

Entry No 1	Description	Document Type	Document No	Posting Date	Invoice Creation Date	Report-to State	Report-to County	Report-to City	Customer No	Tax Group Code	Tax Area Code	Tax Liability	Gross Inv/CM Sales (Tax/NonTax)	Net Inv/CM Sales (Taxable)	Net Inv/CM Sales (NonTaxable)
(There is nothing to show in this view)															
- Totals**

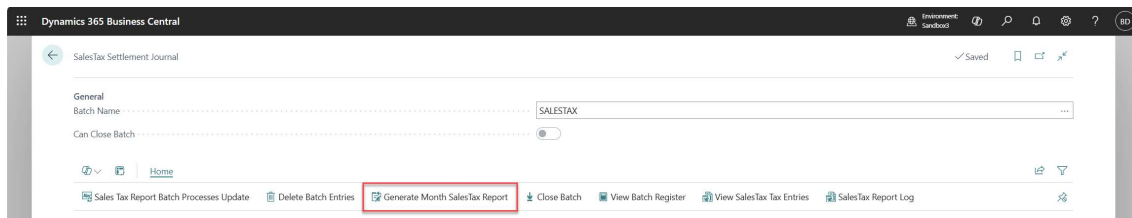
Gross Sales		Net Sales		Tax	
Gross Sales (Tax/NonTax)	0.00	Net Sales (Taxable)	0.00	Sales Tax	0.00
		Net Sales (NonTaxable)	0.00	Credit Tax	0.00

To ensure that all Tax Details required for Excel report generation are available, run the below batch process. This will update even existing documents if need be.

The screenshot shows the Dynamics 365 Business Central interface for the 'SalesTax Settlement Journal' form. The 'Sales Tax Report Batch Processes Update' button is highlighted in the bottom navigation bar.



To Populate Report, run report below:



Populating Report has two steps to it:

### 13.2.1. Data Update

This generates Sales Tax Entries and consolidates them in a format that can be exported:

**SalesTax Report**

**Options**

**Report Options**

Generate SalesTax Entries

Generate Tax Reporting

**Report Filter**

SalesTax Filter CA

CategoryFilter1 SALESTAX

CategoryFilter2

CategoryFilter3

EndDate 6/30/2025

PeriodType 1-Month

**Data Updates**

UpdateHistory

UpdateOptions Update New

Start Date Update New

End Date 6/30/2025

**Update Batch**

JournalTemplate SALESTAX

JournalBatch SALESTAX

**Filter: SalesTax Entry**

Schedule... OK Cancel

Highlighted are mandatory fields to fill.

Period Type: default is 1-month but has below options:

PeriodType 1-Month

**Data Updates**

HistStartDate

1-Month

2-Month

3-Month

4-Month

Update options are two, Update New meaning it updates what is not in the SalesTax Entries, Update All, deletes all entries for the period and batch and reinserts everything.

Dynamics 365 Business Central

Environment: Sandbox

SalesTax Settlement Journal

General  
Batch Name: SALESTAX

Can Close Batch:

Home

Sales Tax Report Batch Processes Update | Delete Batch Entries | Generate Month SalesTax Report | Close Batch | View Batch Register | View SalesTax Tax Entries | SalesTax Report Log

Details

Entry No	Description	Document Type	Document No	Posting Date	Invoice Creation Date	Report-to State	Report-to County	Report-to City	Customer No	Tax Group Code	Tax Area Code	Tax Liability	Gross Inv/CM Sales (Tax/NonTax)	Net Inv/CM Sales (Taxable)	Net Inv/CM Sales (NonTaxable)
1	KERN,CA	Invoice	PS-INV103...	6/1/2025	2/13/2026	CA	0001	0002	000050	FURNITURE	PT0035		647.80	647.80	0.00
2	KERN,CA	Invoice	PS-INV103...	6/1/2025	2/13/2026	CA	0001	0002	000060	FURNITURE	PT0036		433.60	433.60	0.00

Totals

Gross Sales		Net Sales		Tax	
Gross Sales (Tax/NonTax)	1,081.40	Net Sales (Taxable)	1,081.40	Sales Tax	89.22
		Net Sales (NonTaxable)	0.00	Credit Tax	0.00

### 13.2.2. Generate Report

This is the option that generates excel report  
Highlighted fields are mandatory to fill.

#### SalesTax Report

Options

**Report Options**

Generate SalesTax Entries

Generate Tax Reporting

**Report Filter**

SalesTax Filter

CategoryFilter1

CategoryFilter2

CategoryFilter3

EndDate

PeriodType

**Date Filter**

StartDate

EndDate

PeriodFilter

**Show Totals Option**

ShowColumns

IncludeTotal

**Excel Export Option**

ExcelExportOption

Export Excluded from Schedule A

Schedule... OK Cancel

This option generates entries to the Journal as below and generates an excel file with Sheets as defined on the Nexus State.

**Downloads**

Salestax\_060125\_063025\_CA\_021245\_0802 AM.xlsx  
Open file  
See more

General  
Batch Name: SALESTAX  
Can Close Batch:

Home

Sales Tax Report Batch Processes Update | Delete Batch Entries | Generate Month Sales Tax Report | Close Batch | View Batch Register | View Sales Tax Tax Entries | Sales Tax Report Log

**Details**

Entry No	Description	Document Type	Document No	Posting Date	Invoice Creation Date	Report-to State	Report-to County	Report-to City	Customer No	Tax Group Code	Tax Area Code	Tax Liab	Gross Inv/CM Sales (Tax/NonTax)	Net Inv/CM Sales (Taxable)	Net Inv/CM Sales (NonTaxable)
1	KERN,CA	Invoice	PS-INV103...	6/1/2025	2/13/2026	CA	0001	0002	000050	FURNITURE	PT0035	<input type="checkbox"/>	647.80	647.80	0.00
2	KERN,CA	Invoice	PS-INV103...	6/1/2025	2/13/2026	CA	0001	0002	C00060	FURNITURE	PT0036	<input type="checkbox"/>	433.60	433.60	0.00

**Totals**

Gross Sales		Net Sales		Tax	
Gross Sales (Tax/NonTax)	1,081.40	Net Sales (Taxable)	1,081.40	Sales Tax	89.22
		Net Sales (NonTaxable)	0.00	Credit Tax	0.00

Example, the above was generated for CA.

Nexus State

CA · California

Home

Sales Tax API's

**General**

**Address**

**Sales Tax**

**Report Export**

**Exemptions Exclusions**

- Exclude Wholesale
- Exclude Government
- Exclude Other
- Exclude Marketplace

**Export Options**

- Export Details
- Export State
- Export County
- Export Arizona
- Export California
- Export California Dist Summary
- Export Schedule A Summary
- Export Hawaii
- Export Hawaii Details
- Export Tax Area
- Export Payer
- Export Location
- Export Skipped Invoices

Totals  
Gross Sale  
Gross Sale

Net Inv/CM Sales (Taxable) 647.80  
Net Inv/CM Sales (NonTaxable) 0.00

Net Inv/CM Sales (Taxable) 433.60  
Net Inv/CM Sales (NonTaxable) 0.00

89.22  
0.00

## Report Sample Output:

1	Tax Area Code	Jurisdiction Desc	Entry Type	Document Type	Document No	Exemption Type	Gross Income	Sales Amount (Taxable)	Sales Amount (Non-Taxable)	Combined Sales Tax	Combined Credit Tax	State Sales Tax	State Credit Tax	County Sales Tax	County Credit Tax	State Tax	County Tax
2	PT0035	KERN,CA	Sales	Invoice	PS-INV103036		647.80	647.80	0.00	53.44	0.00	46.97	0.00	6.49	0.00	46.97	0.00
3	PT0036	KERN,CA	Sales	Invoice	PS-INV103037		433.60	433.60	0.00	35.77	0.00	31.44	0.00	4.34	0.00	31.44	4.34
4																	
5						Totals	1,081.40	1,081.40	0.00	89.22	0.00	78.40	0.00	10.81	0.00	78.40	4.34

### 13.2.4. Posted Document – Taxability Override

This feature reclassifies a document taxability between Taxable and Non-Taxable.

Posted Document:

This document has a taxable line.

Posted Sales Invoice: PS-INV103036 · USGecoder Customer

Acumens e-Tax

Tax Calculation API: USG01 | Tax Reporting API: [ ]

Tax Liabile:  | Posted Tax Area Code: PT0035

Shipping is Taxable:  | Created on TaxJar:

Tax Area Code: E-TAX | Created on Zamp:

SalesTax Errors: 0 | Report to City: 0002

Marketplace: [ ] | Report to County: 0001

Tax Exemption Type: [ ] | Unincorporated City:

Tax Exemption No.: [ ] | Taxability Override:

Charge Use Tax:  | Update SalesTax Entry:

SalesTax Rate: 8.25 | UpdateTaxRates:

Type	Unit of Measure Code	Unit Price Excl. Tax	Tax Area Code	Tax Group Code	TaxGroup	Taxability Override	Cha. Use Tax	Line Discount %	Line Amount Excl. Tax	Amount Including Tax
Item	PCS	647.80	E-TAX	FURNITURE	FURNITURE	<input checked="" type="checkbox"/>	<input type="checkbox"/>		647.80	701.24

Invoice Discount Amount Excl. Tax: 0.00 | Total Tax (USD): 53.44

Total Excl. Tax (USD): 647.80 | Total Incl. Tax (USD): 701.24

Reclassify that to Non-Taxable and the next report run will classify the amount as Non-Taxable

Dynamics 365 Business Central

Posted Sales Invoice  
PS-INV103036 · USGecoder Customer

Home | Posting | Approve | Incoming Document | Order | Acumens e-Tax | More options

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

### Acumens e-Tax

Tax Calculation API: USG01 | Tax Reporting API: [ ]  
 Tax Liable:  | Posted Tax Area Code: PT0035  
 Shipping is Taxable:  | Created on TaxJar:   
 Tax Area Code: E-TAX | Created on Zamp:   
 Sales Tax Errors: 0 | Report to City: 0002  
 Marketplace: [ ] | Report to County: 0001  
 Tax Exemption Type: [ ] | Unincorporated City:   
 Tax Exemption No.: [ ] | Taxability Override:   
 Charge Use Tax:  | Update Sales Tax Entry:   
 Sales Tax Rate: 8.25 | Update Tax Rates:

Type	Unit of Measure Code	Unit Price Excl. Tax	Tax Area Code	Tax Group Code	Tax Group	Taxability Override	Cha... Use Tax	Line Discount %	Line Amount Excl. Tax	Amount Including Tax	Deferral Code	Department Code	Customergro... Code
Item	PCS	647.80	E-TAX	FURNITURE	FURNITURE	Non-Taxable	<input type="checkbox"/>		647.80	701.24			

Invoice Discount Amount Excl. Tax: 0.00 | Total Tax (USD): 53.44  
 Total Excl. Tax (USD): 647.80 | Total Incl. Tax (USD): 701.24

Report before update:

Dynamics 365 Business Central

Sales Tax Settlement Journal

General  
Batch Name: SALESTAX  
Can Close Batch:

Home

Sales Tax Report Batch Processes Update | Delete Batch Entries | Generate Month Sales Tax Report | Close Batch | View Batch Register | View Sales Tax Tax Entries | Sales Tax Report Log

### Details

Entry No T	Posting Date	Invoice Creation Date	Report to State	Report to County	Report to City	Customer No	Tax Group Code	Tax Area Code	Tax Liable	Gross InvCM Sales (Tax/NonTax)	Net InvCM Sales (Taxable)	Net InvCM Sales (NonTaxable)	Net InvCM Sales (Exempt Cust)	Combined Sales Tax	Combined Credit Tax	State Sales Tax
1	6/1/2025	2/13/2026	CA	0001	0002	000050	FURNITURE	PT0035	<input type="checkbox"/>	647.80	647.80	0.00	0.00	53.44	0.00	46.9
2	6/1/2025	2/13/2026	CA	0001	0002	C00060	FURNITURE	PT0036	<input type="checkbox"/>	433.60	433.60	0.00	0.00	35.77	0.00	31.4

Totals  
 Gross Sales: 1,081.40 | Net Sales: 1,081.40 | Tax Sales Tax: 89.22  
 Gross Sales (Tax/NonTax): 1,081.40 | Net Sales (Taxable): 1,081.40 | Net Sales (NonTaxable): 0.00 | Credit Tax: 0.00

After report data update run:

Dynamics 365 Business Central

SalesTax Settlement Journal

General  
Batch Name: SALESTAX

Can Close Batch:

Home

Sales Tax Report Batch Processes Update | Delete Batch Entries | Generate Month SalesTax Report | Close Batch | View Batch Register | View SalesTax Tax Entries | SalesTax Report Log

Details

Entry No T	Posting Date	Invoice Creation Date	Report-to State	Report-to County	Report-to City	Customer No	Tax Group Code	Tax Area Code	Tax Liab	Gross InvCM Sales (Tax/NonTax)	Net InvCM Sales (Taxable)	Net InvCM Sales (NonTaxable)	Net InvCM Sales (Exempt Cust)	Combined Sales Tax	Combined Credit Tax	State Sales Tax
→ 1	6/1/2025	2/13/2026	CA	0001	0002	000000	FURNITURE	PT0036		433.60	433.60	0.00	0.00	35.77	0.00	31.4
2	6/1/2025	2/13/2026	CA	0001	0002	C00050	FURNITURE	PT0035		647.80	0.00	647.80	0.00	53.44	0.00	46.9

Totals

Gross Sales		Net Sales		Tax	
Gross Sales (Tax/NonTax)	1,081.40	Net Sales (Taxable)	433.60	Sales Tax	89.22
		Net Sales (NonTaxable)	647.80	Credit Tax	0.00