Accounts Receivable > File > Customer Default Sales Tax Exemption by State – Enter Default Exempt ID by Customer and Tax Zone (aka State).

From Customer Master, enter a new Ship To ID, populate the Zone on the Tax Screen (Optional: Program will use the Ship To State if the Zone is blank), Save Ship To ID and this prompt will come up after the screen closes.

Clicking 'No' won't update anything, clicking 'Yes' will update the Sales Tax Exempt ID for the Ship To ID.

Opening an existing Ship To ID and saving will NOT bring up the prompt.

Copying

First select a customer:

Then Click the "Copy Customer" button and select the customer you want to copy the current Exempt ID by State list to:

Click "Copy" to copy all the Exempt IDs to the new Customer:


This will only change the customer on the screen to the new customer. **To push these changes to the DB, click "Save"**. Optionally, you can also backflush all the changes to the DB when saving or backflush all the records with the "Backflush All" option. More info on this difference in the Backflush section.

Backflushing

There are two types of backflushing, changes backflush and an all backflush.

To backflush changes, modify Exempt IDs on the screen for a given customer and click "Save" to push the changes to the DB. At this point you will be prompted with this dialogue:
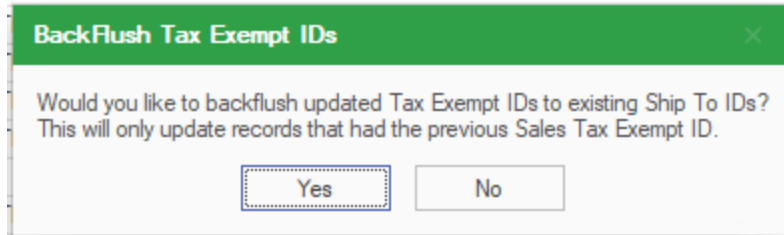
This type of backflushing will check the previous default Exempt ID and the new Exempt ID. Given a specific state (i.e. CA), and a previous Exempt ID (i.e. 1234567890), the program will change the Exempt IDs for all Ship to IDs for the current customer if the state matches the current state and the current Exempt ID matches the previous default Exempt ID to match the new default Exempt ID (i.e. Ship to IDs that were for CA and Exempt ID 1234567890 will now match the new Exempt ID). This backflushing is to protect specific cases where a customer's location may be using a special Sales Tax Exempt ID from the rest of the state.

The other backflush type utilizes the "Backflush All" button.

Clicking the "Backflush All" button will prompt you to confirm your choice as this will update ALL Ship to IDs for the selected customer:
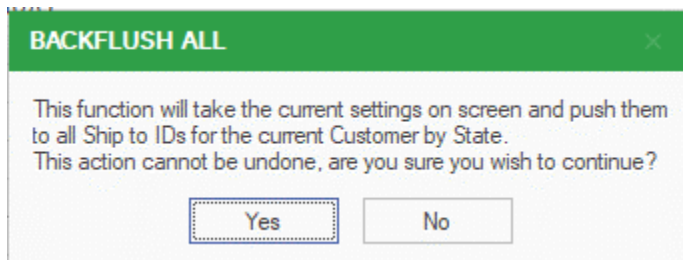
Confirming will then push updates to the database to update the Exempt IDs by State to all Ship to IDs using the Zone on the maintenance screen. Once this is complete, the program will return control to the screen.

In both cases, the program will let you know how many records were updated: