



#334493 removing GST on antarctic nz a/c 3010347 for service call 260950

Submitted 21 April 2022 at 13:59
Received via Mail
Requester Geoff Clapp <geoff.clapp@terracat.co.nz>

CCs
Sue Petersen <sue.petersen@terracat.co.nz>, Darren Fleck <darren.fleck@goughcat.co.nz>, IT Service Desk <servicedesk@terracat.co.nz>, Katrina Lenz <katrina.lenz@goughgroup.co.nz>, Sonia Sherlock <sonia.sherlock@terracat.co.nz>

Status Open
Type Task
Due date
Priority Normal
Group Service Desk
Assignee Jess Beattie

Category
NAXT

Geoff Clapp April 21, 2022 at 13:59
Hi All,

I believe if we remove the GST on the project contract it will then it may allow the GST – the field is locked and can only be changed by IT. Suggest we do this in Sandbox to see if this works...

Microsoft Dynamics AX - Gough Group [CHCPRDAOS07: Session ID - 1363] - [1 - ggnz]

GGNZ > Project management and accounting > Common > Projects > Project contracts

File Project contract Plan Maintain Control

Delete Hours Expenses Hours Fees Projects Refresh Export to Microsoft Excel Attachments

Maintain Cost prices Sales prices Related i... List Attachments

Favourites
My favourites

Project management and accounting
Area page
Common
Projects
All projects
My projects
Project contracts

Project contracts (Unsaved filter)

Project contract ID	Name	Customer account	Customer name	GST group	Sales currency	Invoice frequency
3010347	Antarctica New Zealand	3010347	Antarctica New Zealand	GST	NZD	Daily

Regards

Geoff Clapp
Support Services Manager - Terra Cat
24 Amyes Road, Hornby, PO Box 16168, Christchurch, 8441
M: +64292009044 | **DDI:** +6439832468
W: terracat.co.nz |



Jess Beattie April 21, 2022 at 14:05

Hey Darren,
With the help Geoff, I have changed the GST group on the project contract to zero in Sandbox for you to test out first before we make the change in Prod, provided it works. Please could you open Sandbox and try it in there :)
Let us know how you get on
Kind regards,
Jess Beattie

Service Desk Analyst - Terra Cat
24 Amyes Road, PO Box 16168, Christchurch, 8042
P: 08000 95 95 98 E: Jess.Beattie@terracat.co.nz W: terracat.co.nz

Darren Fleck April 21, 2022 at 15:00

So so close !!!

As all the transactions were already posted, I have had to transfer all the lines to make them pick up the zero rated gst setting change. Transferred from SC260950-09 to SC260950-09

I am now getting a negative rather than a zero ???

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SC260950-09			\$5,600.00	\$5,600.00
Segment Totals				
			Net Sub Total	\$5,600.00
			GST	-\$132.00
			Total NZD	\$5,468.00

When I click on the GST button in the invoice proposal screen

Invoice proposals (1 - ggnz) - Invoice proposal: PJP00419461, 3010347, Call number: SC260950

File

▼

▼

Invoice proposal

✎

Delete

✎

Edit

✎

Post

✎

Enter PO number

✎

Update Po number

GST

Payment schedule

Totals

Print pro forma

Print

Export to Microsoft Excel

List

Attachments

Attachments

Print management

Set up

Maintain

Functions

Details

PJP00419461 : 3010347

Invoice proposal header

Invoice proposal: PJP00419461

Invoice date: 21/04/2022

Project contract ID: 3010347

Customer's PO number: 026308

Tax Invoice:

Project contract name: Antarctica New Zealand

Funding source: Antarctica New Zeal

Sales currency: NZD

Business area: AR Revenue

Invoice proposal transactions

Add lines

Hour

Fee

Remove

View details

<input type="checkbox"/>	Project date	Project	Project category	Activity	Resource	Description	Hours	Line amount
	11/01/2022	sc260950-09	LBR-FLD -REV-FR		Jack Linley	Transaction...	5.00	600.00
	11/01/2022	sc260950-09	LBR-FLD -REV-FR		Jack Linley	Transaction...	1.00	120.00

I see these lines, the top one looks to be causing the negative seen on the proforma

Total calculated GST amount: -132.00

Total actual GST amount: -132.00

OverviewGeneralAdjustment

<input type="checkbox"/>	GST code	Quantity	Amount origin	Adjusted amount origin	Percent	Calculated GST amount	Actual GST amount	Override calculated GST	GST direction	Exempt
	GST	0.00	-880.00	0.00	15.00000	-132.00	-132.00	<input type="checkbox"/>	GST payable	<input type="checkbox"/>
	Zero	0.00	240.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	240.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
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E: Darren.Fleck@terracat.co.nz | **W:** terracat.co.nz |  



From: Jess Beattie (IT Service Desk) <support@itsdterracat.zendesk.com>
Sent: Thursday, 21 April 2022 2:05 pm
To: Geoff Clapp <Geoff.Clapp@terracat.co.nz>
Cc: Jess Beattie <Jess.Beattie@terracat.co.nz>; Sue Petersen <Sue.Petersen@terracat.co.nz>; IT Service Desk <ServiceDesk@terracat.co.nz>; Katrina Lenz <katrina.lenz@goughgroup.co.nz>; Sonia Sherlock <Sonia.Sherlock@terracat.co.nz>; Darren Fleck <Darren.Fleck@terracat.co.nz>
Subject: [IT Service Desk] Re: removing GST on antarctic nz a/c 3010347 for service call 260950

Your request (334493) has been updated. To add additional comments, reply to this email.

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21/04/2022, 14:05 NZST

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Geoff Clapp April 21, 2022 at 15:12

Wondering if we might be best to wait till tomorrow when we can start with a clean slate... Update the project contract to zero rated and update the customer to zero rated (both in sandbox) then try invoicing the segments in sandbox (zero rating them as well) – if that works we can mirror in production...

Regards, Geoff Clapp

From: Darren Fleck <Darren.Fleck@terracat.co.nz>

Sent: Thursday, 21 April 2022 3:00 pm

To: IT Service Desk <support+id334493@itsdterracat.zendesk.com>; Geoff Clapp <Geoff.Clapp@terracat.co.nz>

Cc: Jess Beattie <Jess.Beattie@terracat.co.nz>; Sue Petersen <Sue.Petersen@terracat.co.nz>; IT Service Desk <ServiceDesk@terracat.co.nz>; Katrina Lenz <katrina.lenz@goughgroup.co.nz>; Sonia Sherlock <Sonia.Sherlock@terracat.co.nz>

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SC260950-09		\$5,600.00		\$5,600.00
Segment Totals				
Net Sub Total			\$5,600.00	
GST			-\$132.00	
Total NZD			\$5,468.00	

When I click on the GST button in the invoice proposal screen

Invoice proposals (1 - ggnz) - Invoice report: PJP00419461, 3010347, Call number: SC260950

<div style="display: flex; justify-content: space-between; align-items: center;"> File ▾ Invoice proposal </div>									
Edit	Delete	Enter PO number ▾	GST	Payment schedule	Print pro forma	Export to Microsoft Excel	Attachments	Print management	Set up
Maintain	Post	Functions	Details	Totals	Print pro forma	Export to Microsoft Excel List	Attachments	Print management	Set up

PJP00419461 : 3010347

Invoice proposal header

Invoice proposal: PJP00419461	Customer's PO number: 026308	Funding source: Antartica New Zealand
Invoice date: 21/04/2022	Tax Invoice:	Sales currency: NZD
Project contract ID: 3010347	Project contract name: Antartica New Zealand	Business area: AR Revenue

Invoice proposal transactions

Add lines

Hour	Fee							
<div style="display: flex; justify-content: space-between; align-items: center;"> Remove View details </div>								
<input type="checkbox"/>	Project date	Project	Project category	Activity	Resource	Description	Hours	Line amount
	11/01/2022	sc260950-09	LBR-FLD - REV-FR		Jack Linley	Transactio...	5.00	600.00
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Sent: Thursday, 21 April 2022 2:05 pm

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W: terra.cat.co.nz | [f](#) [i](#)



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Sue Petersen April 21, 2022 at 15:15

Internal note

I think that is a good idea as I played with the original call today as well.

Thanks

Sue Petersen

Business Analyst - Terra Cat

24 Amyes Road, Hornby, PO Box 16-168, Christchurch, 8441

M: +64274870656 |

E: Sue.Petersen@terra.cat.co.nz | W: terra.cat.co.nz | [f](#) [i](#)



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Invoice proposal

Delete

Enter PO number

Update Po number

Payment schedule

Totals

Print pro forma

Print

Export to Microsoft Excel

List

Attachments

Attachments

Print management

Set up

Maintain

Functions

Details

PJP00419461 : 3010347

Invoice proposal header

Invoice proposal: PJP00419461

Customer's PO number: 026308

Funding source: Antartica New Zeal

Invoice date: 21/04/2022

Tax Invoice:

Sales currency: NZD

Project contract ID: 3010347

Project contract name: Antartica New Zealand

Business area: AR Revenue

Invoice proposal transactions

Add lines

Hour

Fee

Remove

View details

Project date

Project

Project category

Activity

Resource

Description

Hours

Line amount

11/01/2022

sc260950-09

LBR-FLD -REV-FR

Jack Linley

Transactio...

5.00

600.00

11/01/2022

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OverviewGeneralAdjustment

<input type="checkbox"/>	GST code	Quantity	Amount origin	Adjusted amount origin	Percent	Calculated GST amount	Actual GST amount	Override calculated GST	GST direction	Exempt
	GST	0.00	-880.00	0.00	15.00000	-132.00	-132.00	<input type="checkbox"/>	GST payable	<input type="checkbox"/>
	Zero	0.00	240.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	240.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	120.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	240.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	240.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	360.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	600.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	120.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	600.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
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	Zero	0.00	120.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	120.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	360.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	360.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	120.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	600.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	600.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	360.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>

Kinda looks like the system is taking the GST off the GST amount resulting in the negative ???

Darren Fleck
Component Rebuild Centre Manager - Terra Cat
 Branston Street, PO Box 16168, Christchurch, 8441
 M: +64292968270 | DDI: +6439832376
 E: Darren.Fleck@terraecat.co.nz | W: terraecat.co.nz |  



From: Jess Beattie (IT Service Desk) <support@itsdterraecat.zendesk.com>
Sent: Thursday, 21 April 2022 2:05 pm
To: Geoff Clapp <Geoff.Clapp@terraecat.co.nz>
Cc: Jess Beattie <Jess.Beattie@terraecat.co.nz>; Sue Petersen <Sue.Petersen@terraecat.co.nz>; IT Service Desk <ServiceDesk@terraecat.co.nz>; Katrina Lenz <katrina.lenz@goughgroup.co.nz>; Sonia Sherlock <Sonia.Sherlock@terraecat.co.nz>; Darren Fleck <Darren.Fleck@terraecat.co.nz>
Subject: [IT Service Desk] Re: removing GST on antarctic nz a/c 3010347 for service call 260950

Your request (334493) has been updated. To add additional comments, reply to this email.

Jess Beattie (ITSD - Terra Cat)
 21/04/2022, 14:05 NZST

Hey Darren,

With the help Geoff, I have changed the GST group on the project contract to zero in Sandbox for you to test out first before we make the change in Prod, provided it works. Please could you open Sandbox and try it in there :)

Let us know how you get on

Kind regards,
 Jess Beattie

Service Desk Analyst - Terra Cat
 24 Amyes Road, PO Box 16168, Christchurch, 8042
 P: 08000 95 95 98 E: Jess.Beattie@terraecat.co.nz W: terraecat.co.nz

Geoff Clapp

Hi All,

I believe if we remove the GST on the project contract it will then it may allow the GST – the field is locked and can only be changed by IT. Suggest we do this in Sandbox to see if this works...

Microsoft Dynamics AX - Gough Group [CHCPRDAOS07: Session ID - 1363] - [1 - ggnz]

GGNZ > Project management and accounting > Common > Projects > Project contracts

File > Project contract > Plan > Maintain > Control

Delete Hours Expenses Expenses Hours Fees Projects Refresh Export to Microsoft Excel Attachments

Maintain Cost prices Sales prices Related i... List Attachments

Favourites

- My favourites
- Project management and accounting
 - Area page
 - Common
 - Projects
 - All projects
 - My projects
 - Project contracts

Project contracts (Unsaved filter)

Project contract ID	Name	Customer account	Customer name	GST group	Sales currency	Invoice frequency
3010347	Antartica New Zealand	3010347	Antartica New Zealand	GST	NZD	Daily

Regards

Geoff Clapp

Support Services Manager - Terra Cat

24 Amyes Road, Hornby, PO Box 16168, Christchurch, 8441

M: +64292009044 |DDI: +6439832468

W: terraecat.co.nz | [f](#) [i](#)



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[K7YZ42-QOP6]

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Darren Fleck April 21, 2022 at 16:27

OK I think we are there..

Once the proforma is produced. I used the GST button in the invoice proposal screen

In the adjusment tab, select over ride and adjust actual GST to 0.00

Temporary GST transactions (1 - ggnz) - Invoice proposal: PJP00419469, 3010347, Call number: SC260975

File ▾

Total calculated GST amount: 840.00 Total actual GST amount: 0.00

Overview General Adjustment

<input type="checkbox"/>	GST code	GST direction	Currency	Amount origin	Adjusted amount origin	Calculated GST charge	Actual GST charge	Calculated GST amount	Actual GST amount	Override calculated GST
	▼	▼	▼							▼
	GST	GST payable	NZD	5,600.00	0.00	0.00	0.00	840.00	0.00	<input checked="" type="checkbox"/>

Proforma still shows GST, but if I post it the invoice has no GST



Tax Invoice

Antarctica New Zealand

Invoice Number P100292111
Invoice Date 21/04/2022
GST Number 10-615-607

	Parts	Labour	Misc.	Total
SC260975-06		\$5,600.00		\$5,600.00
Segment Totals		\$5,600.00		
			Net Sub Total	\$5,600.00
			GST	\$0.00
			Total	\$5,600.00

I re-invoiced the same segment without changing the GST in the proposal screen and invoice has GST showing.



Tax Invoice

Antarctica New Zealand

Invoice Number P100292112
Invoice Date 21/04/2022
GST Number 10-615-607

	Parts	Labour	Misc.	Total
SC260975-06		\$5,600.00		\$5,600.00
Segment Totals		\$5,600.00		
			Net Sub Total	\$5,600.00
			GST	\$840.00
			Total	\$6,440.00

Looks like the change made to the customer account allows you to remove the GST as required rather than from every invoice. Could be handy on this account 😊

Darren Fleck
Component Rebuild Centre Manager - Terra Cat
 Branstons Street, PO Box 16168, Christchurch, 8441
M: +64292968270 | **DDI:** +6439832376
E: Darren.Fleck@terraecat.co.nz | **W:** terraecat.co.nz |  

From: Sue Petersen <Sue.Petersen@terracat.co.nz>
Sent: Thursday, 21 April 2022 3:15 pm
To: Geoff Clapp <Geoff.Clapp@terracat.co.nz>; Darren Fleck <Darren.Fleck@terracat.co.nz>; IT Service Desk <support+id334493@itsdterracat.zendesk.com>
Cc: Jess Beattie <Jess.Beattie@terracat.co.nz>; IT Service Desk <ServiceDesk@terracat.co.nz>; Katrina Lenz <katrina.lenz@goughgroup.co.nz>; Sonia Sherlock <Sonia.Sherlock@terracat.co.nz>
Subject: RE: [IT Service Desk] Re: removing GST on antartic nz a/c 3010347 for service call 260950

I think that is a good idea as I played with the original call today as well.
 Thanks

Sue Petersen
Business Analyst - Terra Cat
 24 Amyes Road, Hornby, PO Box 16-168, Christchurch, 8441
M: +64274870656 |
E: Sue.Petersen@terracat.co.nz | **W:** terracat.co.nz |  

From: Geoff Clapp <Geoff.Clapp@terracat.co.nz>
Sent: Thursday, 21 April 2022 3:13 pm
To: Darren Fleck <Darren.Fleck@terracat.co.nz>; IT Service Desk <support+id334493@itsdterracat.zendesk.com>
Cc: Jess Beattie <Jess.Beattie@terracat.co.nz>; Sue Petersen <Sue.Petersen@terracat.co.nz>; IT Service Desk <ServiceDesk@terracat.co.nz>; Katrina Lenz <katrina.lenz@goughgroup.co.nz>; Sonia Sherlock <Sonia.Sherlock@terracat.co.nz>
Subject: RE: [IT Service Desk] Re: removing GST on antartic nz a/c 3010347 for service call 260950

Wondering if we might be best to wait till tomorrow when we can start with a clean slate... Update the project contract to zero rated and update the customer to zero rated (both in sandbox) then try invoicing the segments in sandbox (zero rating them as well) – if that works we can mirror in production...

Regards, Geoff Clapp

From: Darren Fleck <Darren.Fleck@terracat.co.nz>
Sent: Thursday, 21 April 2022 3:00 pm
To: IT Service Desk <support+id334493@itsdterracat.zendesk.com>; Geoff Clapp <Geoff.Clapp@terracat.co.nz>
Cc: Jess Beattie <Jess.Beattie@terracat.co.nz>; Sue Petersen <Sue.Petersen@terracat.co.nz>; IT Service Desk <ServiceDesk@terracat.co.nz>; Katrina Lenz <katrina.lenz@goughgroup.co.nz>; Sonia Sherlock <Sonia.Sherlock@terracat.co.nz>
Subject: RE: [IT Service Desk] Re: removing GST on antartic nz a/c 3010347 for service call 260950

So so close !!!

As all the transactions were already posted, I have had to transfer all the lines to make them pick up the zero rated gst setting change. Transferred from SC260950-09 to SC260950-09

I am now getting a negative rather than a zero ???

			Total Labour on segment	\$5,600.00
			SC260950-09 Total:	\$5,600.00
	Parts	Labour	Misc.	Total
SC260950-09		\$5,600.00		\$5,600.00
Segment Totals				
			Net Sub Total	\$5,600.00
			GST	-\$132.00
			Total NZD	\$5,468.00

When I click on the GST button in the invoice proposal screen

Invoice proposals (1 - ggnz) - Invoice proposal: PJP00419461, 3010347, Call number: SC260950

File - Invoice proposal

Edit Delete Enter PO number Update Po number

Payment schedule Totals Print pro forma Print to Microsoft Excel Attachments Print management Set up

Maintain Functions Details

PJP00419461 : 3010347

Invoice proposal header

Invoice proposal: PJP00419461 Customer's PO number: 026308 Funding source: Antartica New Zeal
 Invoice date: 21/04/2022 Tax Invoice: Sales currency: NZD
 Project contract ID: 3010347 Project contract name: Antartica New Zealand Business area: AR Revenue

Invoice proposal transactions

Add lines

Hour	Fee
11/01/2022	sc260950-09 LBR-FLD -REV-FR Jack Linley Transaction... 5.00 600.00
11/01/2022	sc260950-09 LBR-FLD -REV-FR Jack Linley Transaction... 1.00 120.00

I see these lines, the top one looks to be causing the negative seen on the proforma

Total calculated GST amount: -132.00

Total actual GST amount: -132.00

OverviewGeneralAdjustment

<input type="checkbox"/>	GST code	Quantity	Amount origin	Adjusted amount origin	Percent	Calculated GST amount	Actual GST amount	Override calculated GST	GST direction	Exempt
	GST	0.00	-880.00	0.00	15.00000	-132.00	-132.00	<input type="checkbox"/>	GST payable	<input type="checkbox"/>
	Zero	0.00	240.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	240.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	120.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	240.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	240.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	360.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	600.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	120.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	600.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	120.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	600.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	360.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	120.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	120.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	360.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	360.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	120.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	600.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	600.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	360.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>

Kinda looks like the system is taking the GST off the GST amount resulting in the negative ???

Darren Fleck
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 M: +64292968270 | DDI: +6439832376
 E: Darren.Fleck@terracat.co.nz | W: terracat.co.nz | [f](#) [i](#)



From: Jess Beattie (IT Service Desk) <support@itsdterracat.zendesk.com>
Sent: Thursday, 21 April 2022 2:05 pm
To: Geoff Clapp <Geoff.Clapp@terracat.co.nz>
Cc: Jess Beattie <Jess.Beattie@terracat.co.nz>; Sue Petersen <Sue.Petersen@terracat.co.nz>; IT Service Desk <ServiceDesk@terracat.co.nz>; Katrina Lenz <katrina.lenz@goughgroup.co.nz>; Sonia Sherlock <Sonia.Sherlock@terracat.co.nz>; Darren Fleck <Darren.Fleck@terracat.co.nz>
Subject: [IT Service Desk] Re: removing GST on antartic nz a/c 3010347 for service call 260950

Your request (334493) has been updated. To add additional comments, reply to this email.

Jess Beattie (ITSD - Terra Cat)

21/04/2022, 14:05 NZST

Hey Darren,

With the help Geoff, I have changed the GST group on the project contract to zero in Sandbox for you to test out first before we make the change in Prod, provided it works. Please could you open Sandbox and try it in there :)

Let us know how you get on

Kind regards,
Jess Beattie

Service Desk Analyst - Terra Cat
24 Amyes Road, PO Box 16168, Christchurch, 8042
P: 08000 95 95 98 E: Jess.Beattie@terracat.co.nz W: terracat.co.nz

Geoff Clapp

21/04/2022, 13:59 NZST

Hi All,



I believe if we remove the GST on the project contract it will then it may allow the GST – the field is locked and can only be changed by IT. Suggest we do this in Sandbox to see if this works...

The screenshot shows the Microsoft Dynamics AX interface for 'Project contracts'. The breadcrumb navigation is: GGNZ > Project management and accounting > Common > Projects > Project contracts. The ribbon includes 'File', 'Project contract', 'Plan', 'Maintain', and 'Control'. The 'Project contract' ribbon has tabs for 'Hours', 'Expenses', 'Fees', 'Subscriptions', 'Projects', 'Refresh', 'Export to Microsoft Excel', and 'Attachments'. The 'Project contracts (Unsaved filter)' table is displayed with the following data:

Project contract ID	Name	Customer account	Customer name	GST group	Sales currency	Invoice frequency
3010347	Antartica New Zealand	3010347	Antartica New Zealand	GST	NZD	Daily

The 'GST group' field in the first row is circled in red.

Regards

Geoff Clapp
Support Services Manager - Terra Cat
24 Amyes Road, Hornby, PO Box 16168, Christchurch, 8441
M: +64292009044 |DDI: +6439832468
W: terracat.co.nz |  



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Jess Beattie April 22, 2022 at 09:22

I have now changed the Project contract to zero in Sandbox to be tested again :)

Kind regards,
Jess Beattie

Service Desk Analyst - Terra Cat
24 Amyes Road, PO Box 16168, Christchurch, 8042
P: 08000 95 95 98 E: Jess.Beattie@terracat.co.nz W: terracat.co.nz

Geoff Clapp April 22, 2022 at 09:34

Hi,

I have set the CUST to zero rated in sandbox.

All customers (Unsaved filter) Customer account

Customer account	Invoice acco...	Name	Invoicin...	Credit hold reason	Customer group	GST g
3010347		Antarctica New Zealand	No		EXT - NZ	Zero

3010347 : Antarctica New Zealand

Customer group: EXT - NZ Terms of payment: 0120

Credit limit: 1,791,597.99 Method of payment: Cheque

Delivery terms: Payment schedule:

GST group: Zero Modified date and time: 22/04/2022 09:29:55 am

Settlement discount: Modified by: geoff

Regards, Geoff Clapp

From: Jess Beattie (IT Service Desk) <support@itsdterracat.zendesk.com>

Sent: Friday, 22 April 2022 9:23 am

To: Geoff Clapp <Geoff.Clapp@terracat.co.nz>

Cc: Sue Petersen <Sue.Petersen@terracat.co.nz>; IT Service Desk <ServiceDesk@terracat.co.nz>; Katrina Lenz <katrina.lenz@goughgroup.co.nz>; Sonia Sherlock <Sonia.Sherlock@terracat.co.nz>; Darren Fleck <Darren.Fleck@terracat.co.nz>

Subject: [IT Service Desk] Re: removing GST on antartic nz a/c 3010347 for service call 260950

Your request (334493) has been updated. To add additional comments, reply to this email.

Jess Beattie (ITSD - Terra Cat)

22/04/2022, 9:22 NZST

I have now changed the Project contract to zero in Sandbox to be tested again :)

Kind regards,
Jess Beattie

Service Desk Analyst - Terra Cat

24 Amyes Road, PO Box 16168, Christchurch, 8042

P: 08000 95 95 98 E: Jess.Beattie@terracat.co.nz W: terracat.co.nz

Darren Fleck

21/04/2022, 16:27 NZST

OK I think we are there..

Once the proforma is produced. I used the GST button in the invoice proposal screen

In the adjustment tab, select over ride and adjust actual GST to 0.00

Temporary GST transactions (1 - ggnz) - Invoice proposal: PJP00419469, 3010347, Call number: SC260975

File ▾

Total calculated GST amount: 840.00 Total actual GST amount: 0.00

Overview General Adjustment

<input type="checkbox"/>	GST code	GST direction	Currency	Amount origin	Adjusted amount origin	Calculated GST charge	Actual GST charge	Calculated GST amount	Actual GST amount	Override calculated GST
	▼	▼	▼							▼
	GST	GST payable	NZD	5,600.00	0.00	0.00	0.00	840.00	0.00	<input checked="" type="checkbox"/>

Proforma still shows GST, but if I post it the invoice has no GST



Antarctica New Zealand

Tax Invoice

Invoice Number P100292111
Invoice Date 21/04/2022
GST Number 10-615-607

	Parts	Labour	Misc.	Total
SC260975-06		\$5,600.00		\$5,600.00
Segment Totals		\$5,600.00		

Net Sub Total	\$5,600.00
GST	\$0.00
Total	\$5,600.00

I re-invoiced the same segment without changing the GST in the proposal screen and invoice has GST showing.



Antarctica New Zealand

Tax Invoice

Invoice Number P100292112
Invoice Date 21/04/2022
GST Number 10-615-607

	Parts	Labour	Misc.	Total
SC260975-06		\$5,600.00		\$5,600.00
Segment Totals		\$5,600.00		
Net Sub Total				\$5,600.00
GST				\$840.00
Total				\$6,440.00

Looks like the change made to the customer account allows you to remove the GST as required rather than from every invoice.



Could be handy on this account 😊

Darren Fleck

Component Rebuild Centre Manager - Terra Cat

Branston Street, PO Box 16168, Christchurch, 8441

M: +64292968270 | DDI: +6439832376

E: Darren.Fleck@terraecat.co.nz | W: terraecat.co.nz |  



From: Sue Petersen <Sue.Petersen@terraecat.co.nz>

Sent: Thursday, 21 April 2022 3:15 pm

To: Geoff Clapp <Geoff.Clapp@terraecat.co.nz>; Darren Fleck <Darren.Fleck@terraecat.co.nz>; IT Service Desk <support+id334493@itsdterraecat.zendesk.com>

Cc: Jess Beattie <Jess.Beattie@terraecat.co.nz>; IT Service Desk <ServiceDesk@terraecat.co.nz>;

Katrina Lenz <katrina.lenz@goughgroup.co.nz>; Sonia Sherlock <Sonia.Sherlock@terraecat.co.nz>

Subject: RE: [IT Service Desk] Re: removing GST on antarctic nz a/c 3010347 for service call 260950

I think that is a good idea as I played with the original call today as well.

Thanks

Sue Petersen

Business Analyst - Terra Cat

24 Amyes Road, Hornby, PO Box 16-168, Christchurch, 8441

M: +64274870656 |

E: Sue.Petersen@terraecat.co.nz | W: terraecat.co.nz |  



From: Geoff Clapp <Geoff.Clapp@terraecat.co.nz>

Sent: Thursday, 21 April 2022 3:13 pm

To: Darren Fleck <Darren.Fleck@terraecat.co.nz>; IT Service Desk <support+id334493@itsdterraecat.zendesk.com>

Cc: Jess Beattie <Jess.Beattie@terraecat.co.nz>; Sue Petersen <Sue.Petersen@terraecat.co.nz>; IT Service Desk <ServiceDesk@terraecat.co.nz>; Katrina Lenz <katrina.lenz@goughgroup.co.nz>; Sonia Sherlock <Sonia.Sherlock@terraecat.co.nz>

Subject: RE: [IT Service Desk] Re: removing GST on antarctic nz a/c 3010347 for service call 260950

Wondering if we might be best to wait till tomorrow when we can start with a clean slate... Update the project contract to zero rated and update the customer to zero rated (both in sandbox) then try invoicing the segments in sandbox (zero rating them as well) – if that works we can mirror in production...

Total calculated GST amount: -132.00

Total actual GST amount: -132.00

Overview

General

Adjustment

<input type="checkbox"/>	GST code	Quantity	Amount origin	Adjusted amount origin	Percent	Calculated GST amount	Actual GST amount	Override calculated GST	GST direction	Exempt
	GST	0.00	-880.00	0.00	15.00000	-132.00	-132.00	<input type="checkbox"/>	GST payable	<input type="checkbox"/>
	Zero	0.00	240.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	240.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	120.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	240.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	240.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	360.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	600.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	120.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	600.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
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Kinda looks like the system is taking the GST off the GST amount resulting in the negative ???

Darren Fleck

Component Rebuild Centre Manager - Terra Cat

Branston Street, PO Box 16168, Christchurch, 8441

M: +64292968270 | **DDI:** +6439832376

E: Darren.Fleck@terraecat.co.nz | **W:** terraecat.co.nz |  



From: Jess Beattie (IT Service Desk) <support@itsdterraecat.zendesk.com>

Sent: Thursday, 21 April 2022 2:05 pm

To: Geoff Clapp <Geoff.Clapp@terraecat.co.nz>

Cc: Jess Beattie <Jess.Beattie@terraecat.co.nz>; Sue Petersen <Sue.Petersen@terraecat.co.nz>; IT Service Desk <ServiceDesk@terraecat.co.nz>; Katrina Lenz <katrina.lenz@goughgroup.co.nz>; Sonia Sherlock <Sonia.Sherlock@terraecat.co.nz>; Darren Fleck <Darren.Fleck@terraecat.co.nz>

Subject: [IT Service Desk] Re: removing GST on antartic nz a/c 3010347 for service call 260950

Your request (334493) has been updated. To add additional comments, reply to this email.

Jess Beattie (ITSD - Terra Cat)

21/04/2022, 14:05 NZST

Hey Darren,

With the help Geoff, I have changed the GST group on the project contract to zero in Sandbox for you to test out first before we make the change in Prod, provided it works. Please could you open Sandbox and try it in there :)
Let us know how you get on

Kind regards,

Jess Beattie

Service Desk Analyst - Terra Cat

24 Amyes Road, PO Box 16168, Christchurch, 8042

P: 08000 95 95 98 E: Jess.Beattie@terraecat.co.nz W: terraecat.co.nz

Geoff Clapp

21/04/2022, 13:59 NZST

Hi All,

I believe if we remove the GST on the project contract it will then it may allow the GST – the field is locked and can only be changed by IT. Suggest we do this in Sandbox to see if this works...

Microsoft Dynamics AX - Gough Group [CHCPRDAOS07: Session ID - 1363] - [1 - ggnz]

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Project contracts (Unsaved filter)

Project contract ID	Name	Customer account	Customer name	GST group	Sales currency	Invoice frequency
3010347						
3010347	Antarctica New Zealand	3010347	Antarctica New Zealand	GST	NZD	Daily

Regards

Geoff Clapp
Support Services Manager - Terra Cat
 24 Amyes Road, Hornby, PO Box 16168, Christchurch, 8441
M: +64292009044 **DDI:** +6439832468
W: terra.cat.co.nz | [f](#) [i](#)



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[K7YZ42-QOP6]

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Geoff Clapp

21/04/2022, 15:12 NZST

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Regards, Geoff Clapp

From: Darren Fleck <Darren.Fleck@terracat.co.nz>
Sent: Thursday, 21 April 2022 3:00 pm
To: IT Service Desk <support+id334493@itsdterracat.zendesk.com>; Geoff Clapp <Geoff.Clapp@terracat.co.nz>
Cc: Jess Beattie <Jess.Beattie@terracat.co.nz>; Sue Petersen <Sue.Petersen@terracat.co.nz>; IT Service Desk <ServiceDesk@terracat.co.nz>; Katrina Lenz <katrina.lenz@goughgroup.co.nz>; Sonia Sherlock <Sonia.Sherlock@terracat.co.nz>
Subject: RE: [IT Service Desk] Re: removing GST on antartic nz a/c 3010347 for service call 260950

So so close !!!

As all the transactions were already posted, I have had to transfer all the lines to make them pick up the zero rated gst setting change. Transferred from SC260950-09 to SC260950-09

I am now getting a negative rather than a zero ???

			Total Labour on segment	\$5,600.00
			SC260950-09 Total:	\$5,600.00
	Parts	Labour	Misc.	Total
SC260950-09		\$5,600.00		\$5,600.00
Segment Totals				
Net Sub Total				\$5,600.00
GST				-\$132.00
Total NZD				\$5,468.00

When I click on the GST button in the invoice proposal screen

Invoice proposal: PIP00419461, 3010347, Call number: SC260950

Invoice proposal: PIP00419461
 Invoice date: 21/04/2022
 Project contract ID: 3010347

Customer's PO number: 026308
 Tax Invoice:
 Project contract name: Antarctica New Zealand

Funding source: Antarctica New Zealand
 Sales currency: NZD
 Business area: AR Revenue

Invoice proposal transactions

Hour	Fee
11/01/2022	sc260950-09 LBR-FLD -REV-RR Jack Linley Transaction... 5.00 800.00
11/01/2022	sc260950-09 LBR-FLD -REV-RR Jack Linley Transaction... 1.00 120.00

I see these lines, the top one looks to be causing the negative seen on the proforma

Total calculated GST amount: -132.00

Total actual GST amount: -132.00

Overview

General

Adjustment

<input type="checkbox"/> GST code	Quantity	Amount origin	Adjusted amount origin	Percent	Calculated GST amount	Actual GST amount	Override calculated GST	GST direction	Exempt
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Darren Fleck

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E: Darren.Fleck@terraecat.co.nz | **W:** terraecat.co.nz |  



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Subject: [IT Service Desk] Re: removing GST on antartic nz a/c 3010347 for service call 260950

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21/04/2022, 14:05 NZST

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Jess Beattie

Service Desk Analyst - Terra Cat

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21/04/2022, 13:59 NZST

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Maintain Cost prices Sales prices Related i... List Attachments



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Project contracts (Unsaved filter)

Project contract ID	Name	Customer account	Customer name	GST group	Sales currency	Invoice frequency
3010347						
3010347	Antarctica New Zealand	3010347	Antarctica New Zealand	GST	NZD	Daily

Regards

Geoff Clapp
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 24 Amyes Road, Hornby, PO Box 16168, Christchurch, 8441
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Darren Fleck

21/04/2022, 15:00 NZST

So so close !!!

Darren Fleck April 22, 2022 at 13:57

Afternoon All

I have now invoiced out all the segments to Antarctica NZ that are to include GST (in production)

Jess

Could you change the account setting in production and I will invoice out the last three segments that are to be GST zero rated.

As soon as I have the invoices produced I will let you know so you can change it back

Segments to be zero rated are;

SC236933-14

SC260970-09

SC260975-06

Thanks

Darren Fleck

Component Rebuild Centre Manager - Terra Cat

Branston Street, PO Box 16168, Christchurch, 8441

M: +64292968270 | **DDI:** +6439832376

E: Darren.Fleck@terraecat.co.nz | **W:** terraecat.co.nz |  



From: Geoff Clapp <Geoff.Clapp@terraecat.co.nz>

Sent: Friday, 22 April 2022 9:35 am

To: IT Service Desk <support+id334493@itsdterraecat.zendesk.com>

Cc: Sue Petersen <Sue.Petersen@terraecat.co.nz>; IT Service Desk <ServiceDesk@terraecat.co.nz>; Katrina Lenz <katrina.lenz@goughgroup.co.nz>; Sonia Sherlock <Sonia.Sherlock@terraecat.co.nz>; Darren Fleck <Darren.Fleck@terraecat.co.nz>

Subject: RE: [IT Service Desk] Re: removing GST on antarctic nz a/c 3010347 for service call 260950

Hi,

I have set the CUST to zero rated in sandbox.

All customers (Unsaved filter) Customer account

Customer account	Invoice acco...	Name	Invoicin...	Credit hold reason	Customer group	GST g
3010347		Antarctica New Zealand	No		EXT - NZ	Zero

3010347 : Antarctica New Zealand

Customer group: EXT - NZ Terms of payment: 0120

Credit limit: 1,791,597.99 Method of payment: Cheque

Delivery terms: Payment schedule:

GST group: Zero Modified date and time: 22/04/2022 09:29:55 am

Settlement discount: Modified by: geoff

Regards, Geoff Clapp

From: Jess Beattie (IT Service Desk) <support@itsdterracat.zendesk.com>

Sent: Friday, 22 April 2022 9:23 am

To: Geoff Clapp <Geoff.Clapp@terracat.co.nz>

Cc: Sue Petersen <Sue.Petersen@terracat.co.nz>; IT Service Desk <ServiceDesk@terracat.co.nz>; Katrina Lenz <katrina.lenz@goughgroup.co.nz>; Sonia Sherlock <Sonia.Sherlock@terracat.co.nz>; Darren Fleck <Darren.Fleck@terracat.co.nz>

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Jess Beattie (ITSD - Terra Cat)

22/04/2022, 9:22 NZST

I have now changed the Project contract to zero in Sandbox to be tested again :)

Kind regards,
Jess Beattie

Service Desk Analyst - Terra Cat

24 Amyes Road, PO Box 16168, Christchurch, 8042

P: 08000 95 95 98 E: Jess.Beattie@terracat.co.nz W: terracat.co.nz

Darren Fleck

21/04/2022, 16:27 NZST

OK I think we are there..

Once the proforma is produced. I used the GST button in the invoice proposal screen

In the adjustment tab, select over ride and adjust actual GST to 0.00

Temporary GST transactions (1 - ggnz) - Invoice proposal: PJP00419469, 3010347, Call number: SC260975

File ▾

Total calculated GST amount: 840.00 Total actual GST amount: 0.00

Overview General Adjustment

<input type="checkbox"/>	GST code	GST direction	Currency	Amount origin	Adjusted amount origin	Calculated GST charge	Actual GST charge	Calculated GST amount	Actual GST amount	Override calculated GST
	▼	▼	▼							▼
	GST	GST payable	NZD	5,600.00	0.00	0.00	0.00	840.00	0.00	<input checked="" type="checkbox"/>

Proforma still shows GST, but if I post it the invoice has no GST



Tax Invoice

Antarctica New Zealand

Invoice Number P100292111
Invoice Date 21/04/2022
GST Number 10-615-607

	Parts	Labour	Misc.	Total
SC260975-06		\$5,600.00		\$5,600.00
Segment Totals		\$5,600.00		

Net Sub Total	\$5,600.00
GST	\$0.00
Total	\$5,600.00

I re-invoiced the same segment without changing the GST in the proposal screen and invoice has GST showing.



Tax Invoice

Antarctica New Zealand

Invoice Number P100292112
Invoice Date 21/04/2022
GST Number 10-615-607

	Parts	Labour	Misc.	Total
SC260975-06		\$5,600.00		\$5,600.00
Segment Totals		\$5,600.00		
Net Sub Total				\$5,600.00
GST				\$840.00
Total				\$6,440.00

Looks like the change made to the customer account allows you to remove the GST as required rather than from every invoice.

Could be handy on this account 😊

Darren Fleck

Component Rebuild Centre Manager - Terra Cat

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Sent: Thursday, 21 April 2022 3:15 pm

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Subject: RE: [IT Service Desk] Re: removing GST on antarctic nz a/c 3010347 for service call 260950

I think that is a good idea as I played with the original call today as well.

Thanks

Sue Petersen

Business Analyst - Terra Cat

24 Amyes Road, Hornby, PO Box 16-168, Christchurch, 8441

M: +64274870656 |

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	Zero	0.00	120.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	240.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	240.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	360.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	600.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	120.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	600.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	120.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	600.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	360.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	120.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	120.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	360.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	360.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	120.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	600.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	600.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	360.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>

Kinda looks like the system is taking the GST off the GST amount resulting in the negative ???

Darren Fleck

Component Rebuild Centre Manager - Terra Cat

Branston Street, PO Box 16168, Christchurch, 8441

M: +64292968270 | **DDI:** +6439832376

E: Darren.Fleck@terraecat.co.nz | **W:** terraecat.co.nz |  



From: Jess Beattie (IT Service Desk) <support@itsdterraecat.zendesk.com>

Sent: Thursday, 21 April 2022 2:05 pm

To: Geoff Clapp <Geoff.Clapp@terraecat.co.nz>

Cc: Jess Beattie <Jess.Beattie@terraecat.co.nz>; Sue Petersen <Sue.Petersen@terraecat.co.nz>; IT Service Desk <ServiceDesk@terraecat.co.nz>; Katrina Lenz <katrina.lenz@goughgroup.co.nz>; Sonia Sherlock <Sonia.Sherlock@terraecat.co.nz>; Darren Fleck <Darren.Fleck@terraecat.co.nz>

Subject: [IT Service Desk] Re: removing GST on antartic nz a/c 3010347 for service call 260950

Your request (334493) has been updated. To add additional comments, reply to this email.

Jess Beattie (ITSD - Terra Cat)

21/04/2022, 14:05 NZST

Hey Darren,

With the help Geoff, I have changed the GST group on the project contract to zero in Sandbox for you to test out first before we make the change in Prod, provided it works. Please could you open Sandbox and try it in there :)

Let us know how you get on

Kind regards,

Jess Beattie

Service Desk Analyst - Terra Cat

24 Amyes Road, PO Box 16168, Christchurch, 8042

P: 08000 95 95 98 E: Jess.Beattie@terraecat.co.nz W: terraecat.co.nz

Geoff Clapp

21/04/2022, 13:59 NZST

Hi All,

I believe if we remove the GST on the project contract it will then it may allow the GST – the field is locked and can only be changed by IT. Suggest we do this in Sandbox to see if this works...

Microsoft Dynamics AX - Gough Group [CHCPRDAOS07: Session ID - 1363] - [1 - ggnz]

GGNZ > Project management and accounting > Common > Projects > Project contracts

File > Project contract > Plan > Maintain > Control

Delete Hours Expenses Hours Expenses Projects Refresh Export to Microsoft Excel Attachments

Maintain Cost prices Sales prices Related i... List Attachments



Favourites

- My favourites
- Project management and accounting
 - Area page
- Common
- Projects
 - All projects
 - My projects
 - Project contracts

Project contracts (Unsaved filter)

Project contract ID	Name	Customer account	Customer name	GST group	Sales currency	Invoice frequency
3010347						
3010347	Antarctica New Zealand	3010347	Antarctica New Zealand	GST	NZD	Daily

Regards

Geoff Clapp
Support Services Manager - Terra Cat
 24 Amyes Road, Hornby, PO Box 16168, Christchurch, 8441
M: +64292009044 **DDI:** +6439832468
W: terra.cat.co.nz |  



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[K7YZ42-QOP6]

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Geoff Clapp

21/04/2022, 15:12 NZST

Wondering if we might be best to wait till tomorrow when we can start with a clean slate... Update the project contract to zero rated and update the customer to zero rated (both in sandbox) then try invoicing the segments in sandbox (zero rating them as well) – if that works we can mirror in production...

Regards, Geoff Clapp

Total calculated GST amount: -132.00 Total actual GST amount: 132.04										
Overview General Adjustment										
<input type="checkbox"/>	GST code	Quantity	Amount origin	Adjusted amount origin	Percent	Calculated GST amount	Actual GST amount	Override calculated GST	GST direction	Exempt
	GST	0.00	-880.00	0.00	15.00000	-132.00	-132.00	<input type="checkbox"/>	GST payable	<input type="checkbox"/>
	Zero	0.00	240.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	240.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	120.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	240.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	240.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	360.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	600.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	120.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	600.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	120.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	600.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	360.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	120.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
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	Zero	0.00	360.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	360.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	120.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	600.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	600.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	360.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>



Kinda looks like the system is taking the GST off the GST amount resulting in the negative ???

Darren Fleck

Component Rebuild Centre Manager - Terra Cat

Branston Street, PO Box 16168, Christchurch, 8441

M: +64292968270 | **DDI:** +6439832376

E: Darren.Fleck@terraecat.co.nz | **W:** terraecat.co.nz |  



From: Jess Beattie (IT Service Desk) <support@itsdterraecat.zendesk.com>

Sent: Thursday, 21 April 2022 2:05 pm

To: Geoff Clapp <Geoff.Clapp@terraecat.co.nz>

Cc: Jess Beattie <Jess.Beattie@terraecat.co.nz>; Sue Petersen <Sue.Petersen@terraecat.co.nz>; IT Service Desk <ServiceDesk@terraecat.co.nz>; Katrina Lenz <katrina.lenz@goughgroup.co.nz>; Sonia Sherlock <Sonia.Sherlock@terraecat.co.nz>; Darren Fleck <Darren.Fleck@terraecat.co.nz>

Subject: [IT Service Desk] Re: removing GST on antartic nz a/c 3010347 for service call 260950

Your request (334493) has been updated. To add additional comments, reply to this email.

Jess Beattie (ITSD - Terra Cat)

21/04/2022, 14:05 NZST

Hey Darren,

With the help Geoff, I have changed the GST group on the project contract to zero in Sandbox for you to test out first before we make the change in Prod, provided it works. Please could you open Sandbox and try it in there :)

Let us know how you get on

Kind regards,

Jess Beattie

Service Desk Analyst - Terra Cat

24 Amyes Road, PO Box 16168, Christchurch, 8042

P: 08000 95 95 98 E: Jess.Beattie@terraecat.co.nz W: terraecat.co.nz

Geoff Clapp

21/04/2022, 13:59 NZST

Hi All,

I believe if we remove the GST on the project contract it will then it may allow the GST – the field is locked and can only be changed by IT. Suggest we do this in Sandbox to see if this works...

Microsoft Dynamics AX - Gough Group [CHCPRDAOS07: Session ID - 1363] - [1 - ggnz]

GGNZ > Project management and accounting > Common > Projects > Project contracts

File > Project contract > Plan > Maintain > Control

Delete Hours Expenses Hours Expenses Projects Refresh Export to Microsoft Excel Attachments

Maintain Cost prices Sales prices Related i... List Attachments


Favourites

- My favourites
- Project management and accounting
 - Area page
 - Common
 - Projects
 - All projects
 - My projects
 - Project contracts

Project contracts (Unsaved filter)

Project contract ID	Name	Customer account	Customer name	GST group	Sales currency	Invoice frequency
3010347						
3010347	Antarctica New Zealand	3010347	Antarctica New Zealand	GST	NZD	Daily

Regards

Geoff Clapp
Support Services Manager - Terra Cat
 24 Amyes Road, Hornby, PO Box 16168, Christchurch, 8441
M: +64292009044 **DDI:** +6439832468
W: terracat.co.nz | 

Jess Beattie April 22, 2022 at 14:02

Done :)

Kind regards,
 Jess Beattie

Service Desk Analyst - Terra Cat
 24 Amyes Road, PO Box 16168, Christchurch, 8042
 P: 08000 95 95 98 E: Jess.Beattie@terracat.co.nz W: terracat.co.nz

Geoff Clapp April 22, 2022 at 14:02

Hi All,

I've updated the cust GST setting to zero rated in Prod . Just needs Jess to update the Project Contract.

Subject: RE: [IT Service Desk] Re: removing GST on antarctic nz a/c 3010347 for service call 260950

Afternoon All

I have now invoiced out all the segments to Antarctica NZ that are to include GST (in production)

Jess

Could you change the account setting in production and I will invoice out the last three segments that are to be GST zero rated. As soon as I have the invoices produced I will let you know so you can change it back

Segments to be zero rated are;

SC236933-14

SC260970-09

SC260975-06

Thanks

Darren Fleck

Component Rebuild Centre Manager - Terra Cat

Branston Street, PO Box 16168, Christchurch, 8441

M: +64292968270 | **DDI:** +6439832376

E: Darren.Fleck@terraecat.co.nz | **W:** terraecat.co.nz |  



From: Geoff Clapp <Geoff.Clapp@terraecat.co.nz>

Sent: Friday, 22 April 2022 9:35 am

To: IT Service Desk <support+id334493@itsdterraecat.zendesk.com>

Cc: Sue Petersen <Sue.Petersen@terraecat.co.nz>; IT Service Desk <ServiceDesk@terraecat.co.nz>; Katrina Lenz <katrina.lenz@goughgroup.co.nz>; Sonia Sherlock <Sonia.Sherlock@terraecat.co.nz>; Darren Fleck <Darren.Fleck@terraecat.co.nz>

Subject: RE: [IT Service Desk] Re: removing GST on antartic nz a/c 3010347 for service call 260950

Hi,

I have set the CUST to zero rated in sandbox.

All customers (Unsaved filter) Customer account

Customer account	Invoice acco...	Name	Invoicin...	Credit hold reason	Customer group	GST g
3010347		Antarctica New Zealand	No		EXT - NZ	Zero

3010347 : Antarctica New Zealand

Customer group: EXT - NZ Terms of payment: 0120

Credit limit: 1,791,597.99 Method of payment: Cheque

Delivery terms: Payment schedule:

GST group: Zero Modified date and time: 22/04/2022 09:29:55 am

Settlement discount: Modified by: geoff

Regards, Geoff Clapp

From: Jess Beattie (IT Service Desk) <support@itsdterracat.zendesk.com>

Sent: Friday, 22 April 2022 9:23 am

To: Geoff Clapp <Geoff.Clapp@terracat.co.nz>

Cc: Sue Petersen <Sue.Petersen@terracat.co.nz>; IT Service Desk <ServiceDesk@terracat.co.nz>; Katrina Lenz <katrina.lenz@goughgroup.co.nz>; Sonia Sherlock <Sonia.Sherlock@terracat.co.nz>; Darren Fleck <Darren.Fleck@terracat.co.nz>

Subject: [IT Service Desk] Re: removing GST on antartic nz a/c 3010347 for service call 260950

Your request (334493) has been updated. To add additional comments, reply to this email.

Jess Beattie (ITSD - Terra Cat)

22/04/2022, 9:22 NZST

I have now changed the Project contract to zero in Sandbox to be tested again :)

Kind regards,

Jess Beattie

Service Desk Analyst - Terra Cat

24 Amyes Road, PO Box 16168, Christchurch, 8042

P: 08000 95 95 98 E: Jess.Beattie@terracat.co.nz W: terracat.co.nz

Darren Fleck

21/04/2022, 16:27 NZST

OK I think we are there..

Once the proforma is produced. I used the GST button in the invoice proposal screen

In the adjustment tab, select over ride and adjust actual GST to 0.00

Temporary GST transactions (1 - ggnz) - Invoice proposal: PJP00419469, 3010347, Call number: SC260975

File ▾

Total calculated GST amount: 840.00 Total actual GST amount: 0.00

Overview General Adjustment

<input type="checkbox"/>	GST code	GST direction	Currency	Amount origin	Adjusted amount origin	Calculated GST charge	Actual GST charge	Calculated GST amount	Actual GST amount	Override calculated GST
	▼	▼	▼							▼
	GST	GST payable	NZD	5,600.00	0.00	0.00	0.00	840.00	0.00	<input checked="" type="checkbox"/>

Proforma still shows GST, but if I post it the invoice has no GST



Tax Invoice

Antarctica New Zealand

Invoice Number P100292111
Invoice Date 21/04/2022
GST Number 10-615-607

	Parts	Labour	Misc.	Total
SC260975-06		\$5,600.00		\$5,600.00
Segment Totals		\$5,600.00		

Net Sub Total	\$5,600.00
GST	\$0.00
Total	\$5,600.00

I re-invoiced the same segment without changing the GST in the proposal screen and invoice has GST showing.



Antarctica New Zealand

Tax Invoice

Invoice Number P100292112
Invoice Date 21/04/2022
GST Number 10-615-607

	Parts	Labour	Misc.	Total
SC260975-06		\$5,600.00		\$5,600.00
Segment Totals		\$5,600.00		
Net Sub Total				\$5,600.00
GST				\$840.00
Total				\$6,440.00

Looks like the change made to the customer account allows you to remove the GST as required rather than from every invoice.



Could be handy on this account 😊

Darren Fleck

Component Rebuild Centre Manager - Terra Cat

Branston Street, PO Box 16168, Christchurch, 8441

M: +64292968270 | DDI: +6439832376

E: Darren.Fleck@terraecat.co.nz | W: terraecat.co.nz |  



From: Sue Petersen <Sue.Petersen@terraecat.co.nz>

Sent: Thursday, 21 April 2022 3:15 pm

To: Geoff Clapp <Geoff.Clapp@terraecat.co.nz>; Darren Fleck <Darren.Fleck@terraecat.co.nz>; IT Service Desk <support+id334493@itsdterraecat.zendesk.com>

Cc: Jess Beattie <Jess.Beattie@terraecat.co.nz>; IT Service Desk <ServiceDesk@terraecat.co.nz>;

Katrina Lenz <katrina.lenz@goughgroup.co.nz>; Sonia Sherlock <Sonia.Sherlock@terraecat.co.nz>

Subject: RE: [IT Service Desk] Re: removing GST on antarctic nz a/c 3010347 for service call 260950

I think that is a good idea as I played with the original call today as well.

Thanks

Sue Petersen

Business Analyst - Terra Cat

24 Amyes Road, Hornby, PO Box 16-168, Christchurch, 8441

M: +64274870656 |

E: Sue.Petersen@terraecat.co.nz | W: terraecat.co.nz |  



From: Geoff Clapp <Geoff.Clapp@terraecat.co.nz>

Sent: Thursday, 21 April 2022 3:13 pm

To: Darren Fleck <Darren.Fleck@terraecat.co.nz>; IT Service Desk <support+id334493@itsdterraecat.zendesk.com>

Cc: Jess Beattie <Jess.Beattie@terraecat.co.nz>; Sue Petersen <Sue.Petersen@terraecat.co.nz>; IT Service Desk <ServiceDesk@terraecat.co.nz>; Katrina Lenz <katrina.lenz@goughgroup.co.nz>; Sonia Sherlock <Sonia.Sherlock@terraecat.co.nz>

Subject: RE: [IT Service Desk] Re: removing GST on antarctic nz a/c 3010347 for service call 260950

Wondering if we might be best to wait till tomorrow when we can start with a clean slate... Update the project contract to zero rated and update the customer to zero rated (both in sandbox) then try invoicing the segments in sandbox (zero rating them as well) – if that works we can mirror in production...

Regards, Geoff Clapp

From: Darren Fleck <Darren.Fleck@terracat.co.nz>

Sent: Thursday, 21 April 2022 3:00 pm

To: IT Service Desk <support+id334493@itsdterracat.zendesk.com>; Geoff Clapp <Geoff.Clapp@terracat.co.nz>

Cc: Jess Beattie <Jess.Beattie@terracat.co.nz>; Sue Petersen <Sue.Petersen@terracat.co.nz>; IT Service Desk <ServiceDesk@terracat.co.nz>; Katrina Lenz <katrina.lenz@goughgroup.co.nz>; Sonia Sherlock <Sonia.Sherlock@terracat.co.nz>

Subject: RE: [IT Service Desk] Re: removing GST on antartic nz a/c 3010347 for service call 260950

So so close !!!

As all the transactions were already posted, I have had to transfer all the lines to make them pick up the zero rated gst setting change. Transferred from SC260950-09 to SC260950-09

I am now getting a negative rather than a zero ???

			Total Labour on segment	\$5,600.00		
			SC260950-09 Total:	\$5,600.00		
			Parts	Labour	Misc.	Total
SC260950-09				\$5,600.00		\$5,600.00
Segment Totals						
			Net Sub Total	\$5,600.00		
			GST	-\$132.00		
			Total NZD	\$5,468.00		

When I click on the GST button in the invoice proposal screen

Invoice proposal (1 - ggn) - Invoice proposal: PIP00419461, 3010347, Call number: SC260950

File Edit View Invoice proposal Enter PO number Enter PO number Update PO number Payment schedule Print proforma Print Export to Microsoft Excel Attachments Attachments Print management Set up

PIP00419461 : 3010347

Invoice proposal header

Invoice proposal: PIP00419461
Invoice date: 21/04/2022
Project contract ID: 3010347

Customer's PO number: 026308
Tax invoice:
Project contract name: Antarctica New Zealand

Funding source: Antarctica New Zealand
Sales currency: NZD
Business area: AR Revenue

Invoice proposal transactions

Hour Fee

View details

Project date	Project	Project category	Activity	Resource	Description	Hours	Line amount
15/01/2022	sc260950-09	LBR-PLD -REV-FR		Jack Linley	Transac...	5.00	800.00
15/01/2022	sc260950-09	LBR-PLD -REV-FR		Jack Linley	Transac...	1.00	120.00

I see these lines, the top one looks to be causing the negative seen on the proforma

Total calculated GST amount: -132.00

Total actual GST amount: 132.00

Overview

General

Adjustment

<input type="checkbox"/>	GST code	Quantity	Amount origin	Adjusted amount origin	Percent	Calculated GST amount	Actual GST amount	Override calculated GST	GST direction	Exempt
	GST	0.00	-880.00	0.00	15.00000	-132.00	-132.00	<input type="checkbox"/>	GST payable	<input type="checkbox"/>
	Zero	0.00	240.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	240.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	120.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	240.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	240.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	360.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	600.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	120.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	600.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
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	Zero	0.00	600.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	360.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	120.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	600.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	360.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	120.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	600.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	360.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>

Kinda looks like the system is taking the GST off the GST amount resulting in the negative ???

Darren Fleck

Component Rebuild Centre Manager - Terra Cat

Branston Street, PO Box 16168, Christchurch, 8441

M: +64292968270 | **DDI:** +6439832376

E: Darren.Fleck@terraecat.co.nz | **W:** terraecat.co.nz |  



From: Jess Beattie (IT Service Desk) <support@itsdterraecat.zendesk.com>

Sent: Thursday, 21 April 2022 2:05 pm

To: Geoff Clapp <Geoff.Clapp@terraecat.co.nz>

Cc: Jess Beattie <Jess.Beattie@terraecat.co.nz>; Sue Petersen <Sue.Petersen@terraecat.co.nz>; IT Service Desk <ServiceDesk@terraecat.co.nz>; Katrina Lenz <katrina.lenz@goughgroup.co.nz>; Sonia Sherlock <Sonia.Sherlock@terraecat.co.nz>; Darren Fleck <Darren.Fleck@terraecat.co.nz>

Subject: [IT Service Desk] Re: removing GST on antartic nz a/c 3010347 for service call 260950

Your request (334493) has been updated. To add additional comments, reply to this email.

Jess Beattie (ITSD - Terra Cat)

21/04/2022, 14:05 NZST

Hey Darren,

With the help Geoff, I have changed the GST group on the project contract to zero in Sandbox for you to test out first before we make the change in Prod, provided it works. Please could you open Sandbox and try it in there :)

Let us know how you get on

Kind regards,

Jess Beattie

Service Desk Analyst - Terra Cat

24 Amyes Road, PO Box 16168, Christchurch, 8042

P: 08000 95 95 98 E: Jess.Beattie@terraecat.co.nz W: terraecat.co.nz

Geoff Clapp

21/04/2022, 13:59 NZST

Hi All,

I believe if we remove the GST on the project contract it will then it may allow the GST – the field is locked and can only be changed by IT. Suggest we do this in Sandbox to see if this works...

Microsoft Dynamics AX - Gough Group [CHCPRDAOS07: Session ID - 1363] - [1 - ggnz]

GGNZ > Project management and accounting > Common > Projects > Project contracts

File > Project contract > Plan > Maintain > Control

Delete Hours Expenses Hours Expenses Projects Refresh Export to Microsoft Excel Attachments

Maintain Cost prices Sales prices Related i... List Attachments



Favourites

- My favourites
- Project management and accounting
 - Area page
- Common
 - Projects
 - All projects
 - My projects
 - Project contracts

Project contracts (Unsaved filter)

Project contract ID	Name	Customer account	Customer name	GST group	Sales currency	Invoice frequency
3010347						
3010347	Antarctica New Zealand	3010347	Antarctica New Zealand	GST	NZD	Daily

Regards

Geoff Clapp
Support Services Manager - Terra Cat
 24 Amyes Road, Hornby, PO Box 16168, Christchurch, 8441
M: +64292009044 **DDI:** +6439832468
W: terra.cat.co.nz |  



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[K7YZ42-QOP6]

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Geoff Clapp

21/04/2022, 15:12 NZST

Wondering if we might be best to wait till tomorrow when we can start with a clean slate... Update the project contract to zero rated and update the customer to zero rated (both in sandbox) then try invoicing the segments in sandbox (zero rating them as well) – if that works we can mirror in production...

Regards, Geoff Clapp

From: Darren Fleck <Darren.Fleck@terracat.co.nz>
Sent: Thursday, 21 April 2022 3:00 pm
To: IT Service Desk <support+id334493@itsdterracat.zendesk.com>; Geoff Clapp <Geoff.Clapp@terracat.co.nz>
Cc: Jess Beattie <Jess.Beattie@terracat.co.nz>; Sue Petersen <Sue.Petersen@terracat.co.nz>; IT Service Desk <ServiceDesk@terracat.co.nz>; Katrina Lenz <katrina.lenz@goughgroup.co.nz>; Sonia Sherlock <Sonia.Sherlock@terracat.co.nz>
Subject: RE: [IT Service Desk] Re: removing GST on antartic nz a/c 3010347 for service call 260950

So so close !!!

As all the transactions were already posted, I have had to transfer all the lines to make them pick up the zero rated gst setting change. Transferred from SC260950-09 to SC260950-09

I am now getting a negative rather than a zero ???

			Total Labour on segment	\$5,600.00
			SC260950-09 Total:	\$5,600.00
	Parts	Labour	Misc.	Total
SC260950-09		\$5,600.00		\$5,600.00
Segment Totals				
Net Sub Total				\$5,600.00
GST				-\$132.00
Total NZD				\$5,468.00

When I click on the GST button in the invoice proposal screen

The screenshot shows the 'Invoice proposal' screen for project P00419461 / 3010347. The 'GST' button is highlighted in yellow. Below the header, the 'Invoice proposal transactions' section shows a table with columns: Hour, Fee, Project date, Project, Project category, Activity, Resource, Description, Hours, and Line amount. The table contains two rows of transaction data.

I see these lines, the top one looks to be causing the negative seen on the proforma

Total calculated GST amount: -132.00

Total actual GST amount: -132.00

Overview

General

Adjustment

<input type="checkbox"/> GST code	Quantity	Amount origin	Adjusted amount origin	Percent	Calculated GST amount	Actual GST amount	Override calculated GST	GST direction	Exempt
GST	0.00	-880.00	0.00	15.00000	-132.00	-132.00	<input type="checkbox"/>	GST payable	<input type="checkbox"/>
Zero	0.00	240.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
Zero	0.00	240.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
Zero	0.00	120.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
Zero	0.00	240.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
Zero	0.00	240.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
Zero	0.00	360.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
Zero	0.00	600.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
Zero	0.00	120.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
Zero	0.00	600.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
Zero	0.00	120.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
Zero	0.00	600.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
Zero	0.00	360.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
Zero	0.00	120.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
Zero	0.00	120.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
Zero	0.00	360.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
Zero	0.00	360.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
Zero	0.00	120.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
Zero	0.00	600.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
Zero	0.00	600.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
Zero	0.00	360.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>



Kinda looks like the system is taking the GST off the GST amount resulting in the negative ???

Darren Fleck

Component Rebuild Centre Manager - Terra Cat

Branston Street, PO Box 16168, Christchurch, 8441

M: +64292968270 | **DDI:** +6439832376

E: Darren.Fleck@terraecat.co.nz | **W:** terraecat.co.nz |  



From: Jess Beattie (IT Service Desk) <support@itsdterraecat.zendesk.com>

Sent: Thursday, 21 April 2022 2:05 pm

To: Geoff Clapp <Geoff.Clapp@terraecat.co.nz>

Cc: Jess Beattie <Jess.Beattie@terraecat.co.nz>; Sue Petersen <Sue.Petersen@terraecat.co.nz>; IT Service Desk <ServiceDesk@terraecat.co.nz>; Katrina Lenz <katrina.lenz@goughgroup.co.nz>; Sonia Sherlock <Sonia.Sherlock@terraecat.co.nz>; Darren Fleck <Darren.Fleck@terraecat.co.nz>

Subject: [IT Service Desk] Re: removing GST on antartic nz a/c 3010347 for service call 260950

Your request (334493) has been updated. To add additional comments, reply to this email.

Jess Beattie (ITSD - Terra Cat)

21/04/2022, 14:05 NZST

Hey Darren,

With the help Geoff, I have changed the GST group on the project contract to zero in Sandbox for you to test out first before we make the change in Prod, provided it works. Please could you open Sandbox and try it in there :)

Let us know how you get on

Kind regards,

Jess Beattie

Service Desk Analyst - Terra Cat

24 Amyes Road, PO Box 16168, Christchurch, 8042

P: 08000 95 95 98 E: Jess.Beattie@terraecat.co.nz W: terraecat.co.nz

Darren Fleck April 22, 2022 at 14:27

Thanks Everyone

I have the three Zero rated proforma invoices that the customer requires, account changes can be reversed.

Appreciate your assistance

Have a great long weekend



Regards

Darren Fleck

Component Rebuild Centre Manager - Terra Cat

Branston Street, PO Box 16168, Christchurch, 8441

M: +64292968270 | **DDI:** +6439832376

E: Darren.Fleck@terraecat.co.nz | **W:** terraecat.co.nz |  



From: Geoff Clapp <Geoff.Clapp@terraecat.co.nz>

Sent: Friday, 22 April 2022 2:03 pm

To: Darren Fleck <Darren.Fleck@terracat.co.nz>; IT Service Desk <support+id334493@itsdterracat.zendesk.com>
Cc: Sue Petersen <Sue.Petersen@terracat.co.nz>; IT Service Desk <ServiceDesk@terracat.co.nz>; Katrina Lenz <katrina.lenz@goughgroup.co.nz>; Sonia Sherlock <Sonia.Sherlock@terracat.co.nz>
Subject: RE: [IT Service Desk] Re: removing GST on antarctic nz a/c 3010347 for service call 260950

Hi All,

I've updated the cust GST setting to zero rated in Prod . Just needs Jess to update the Project Contract.

Microsoft Dynamics AX - Gough Group [CHCPRDAOS02: Session ID - 646] - [1 - ggaz]

Customers > All customers

ts Service Market General Equipment management

Balance Credit balance Bank accounts Credit limit by business... Summary update Customer prepayment perc... Credit cards Refresh Export to Microsoft Excel List Generate from template Attachments Attachments Analyse data Reporting Taxes Registration number search Registration

All customers (Unsaved filter) Type to filter Customer account

Customer account	Invoice acco...	Name	Invoicin...	Credit hold reason	Customer group	GST g
3010347		Antarctica New Zealand	No		EXT - NZ	Zero

3010347 : Antarctica New Zealand

Customer group: EXT - NZ Terms of payment: 0120

Credit limit: 1,791,597.99 Method of payment: Cheque

Delivery terms: Payment schedule:

GST group: Zero Modified date and time: 22/04/2022 02:00:02 pm

Regards, Geoff Clapp

From: Darren Fleck <Darren.Fleck@terracat.co.nz>

Sent: Friday, 22 April 2022 1:58 pm

To: Geoff Clapp <Geoff.Clapp@terracat.co.nz>; IT Service Desk <support+id334493@itsdterracat.zendesk.com>

Cc: Sue Petersen <Sue.Petersen@terracat.co.nz>; IT Service Desk <ServiceDesk@terracat.co.nz>; Katrina Lenz <katrina.lenz@goughgroup.co.nz>; Sonia Sherlock <Sonia.Sherlock@terracat.co.nz>

Subject: RE: [IT Service Desk] Re: removing GST on antartic nz a/c 3010347 for service call 260950

Afternoon All

I have now invoiced out all the segments to Antarctica NZ that are to include GST (in production)

Jess

Could you change the account setting in production and I will invoice out the last three segments that are to be GST zero rated. As soon as I have the invoices produced I will let you know so you can change it back

Segments to be zero rated are;

SC236933-14

SC260970-09

SC260975-06



Thanks

Darren Fleck

Component Rebuild Centre Manager - Terra Cat

Branston Street, PO Box 16168, Christchurch, 8441

M: +64292968270 | **DDI:** +6439832376

E: Darren.Fleck@terracat.co.nz | **W:** terracat.co.nz |  



From: Geoff Clapp <Geoff.Clapp@terracat.co.nz>

Sent: Friday, 22 April 2022 9:35 am

To: IT Service Desk <support+id334493@itsdterracat.zendesk.com>

Cc: Sue Petersen <Sue.Petersen@terracat.co.nz>; IT Service Desk <ServiceDesk@terracat.co.nz>; Katrina Lenz <katrina.lenz@goughgroup.co.nz>; Sonia Sherlock <Sonia.Sherlock@terracat.co.nz>; Darren Fleck <Darren.Fleck@terracat.co.nz>

Subject: RE: [IT Service Desk] Re: removing GST on antartic nz a/c 3010347 for service call 260950

Hi,

I have set the CUST to zero rated in sandbox.

All customers (Unsaved filter) Customer account

Customer account	Invoice acco...	Name	Invoicin...	Credit hold reason	Customer group	GST g
3010347		Antarctica New Zealand	No		EXT - NZ	Zero

3010347 : Antarctica New Zealand

Customer group: EXT - NZ Terms of payment: 0120

Credit limit: 1,791,597.99 Method of payment: Cheque

Delivery terms: Payment schedule:

GST group: Zero Modified date and time: 22/04/2022 09:29:55 am

Settlement discount: Modified by: geoff

Regards, Geoff Clapp

From: Jess Beattie (IT Service Desk) <support@itsdterracat.zendesk.com>

Sent: Friday, 22 April 2022 9:23 am

To: Geoff Clapp <Geoff.Clapp@terracat.co.nz>

Cc: Sue Petersen <Sue.Petersen@terracat.co.nz>; IT Service Desk <ServiceDesk@terracat.co.nz>; Katrina Lenz <katrina.lenz@goughgroup.co.nz>; Sonia Sherlock <Sonia.Sherlock@terracat.co.nz>; Darren Fleck <Darren.Fleck@terracat.co.nz>

Subject: [IT Service Desk] Re: removing GST on antartic nz a/c 3010347 for service call 260950

Your request (334493) has been updated. To add additional comments, reply to this email.

Jess Beattie (ITSD - Terra Cat)

22/04/2022, 9:22 NZST

I have now changed the Project contract to zero in Sandbox to be tested again :)

Kind regards,

Jess Beattie

Service Desk Analyst - Terra Cat

24 Amyes Road, PO Box 16168, Christchurch, 8042

P: 08000 95 95 98 E: Jess.Beattie@terracat.co.nz W: terracat.co.nz

Darren Fleck

21/04/2022, 16:27 NZST

OK I think we are there..

Once the proforma is produced. I used the GST button in the invoice proposal screen

In the adjustment tab, select over ride and adjust actual GST to 0.00

Temporary GST transactions (1 - ggnz) - Invoice proposal: PJP00419469, 3010347, Call number: SC260975

File ▾

Total calculated GST amount: 840.00 Total actual GST amount: 0.00

Overview General Adjustment

<input type="checkbox"/>	GST code	GST direction	Currency	Amount origin	Adjusted amount origin	Calculated GST charge	Actual GST charge	Calculated GST amount	Actual GST amount	Override calculated GST
	▼	▼	▼							▼
	GST	GST payable	NZD	5,600.00	0.00	0.00	0.00	840.00	0.00	<input checked="" type="checkbox"/>

Proforma still shows GST, but if I post it the invoice has no GST



Tax Invoice

Antarctica New Zealand

Invoice Number P100292111
Invoice Date 21/04/2022
GST Number 10-615-607

	Parts	Labour	Misc.	Total
SC260975-06		\$5,600.00		\$5,600.00
Segment Totals		\$5,600.00		
Net Sub Total				\$5,600.00
GST				\$0.00
Total				\$5,600.00

I re-invoiced the same segment without changing the GST in the proposal screen and invoice has GST showing.



Antarctica New Zealand

Tax Invoice

Invoice Number P100292112
Invoice Date 21/04/2022
GST Number 10-615-607

	Parts	Labour	Misc.	Total
SC260975-06		\$5,600.00		\$5,600.00
Segment Totals		\$5,600.00		
Net Sub Total				\$5,600.00
GST				\$840.00
Total				\$6,440.00

Looks like the change made to the customer account allows you to remove the GST as required rather than from every invoice.



Could be handy on this account 😊

Darren Fleck

Component Rebuild Centre Manager - Terra Cat

Branston Street, PO Box 16168, Christchurch, 8441

M: +64292968270 | DDI: +6439832376

E: Darren.Fleck@terraecat.co.nz | W: terraecat.co.nz |  



From: Sue Petersen <Sue.Petersen@terraecat.co.nz>

Sent: Thursday, 21 April 2022 3:15 pm

To: Geoff Clapp <Geoff.Clapp@terraecat.co.nz>; Darren Fleck <Darren.Fleck@terraecat.co.nz>; IT Service Desk <support+id334493@itsdterraecat.zendesk.com>

Cc: Jess Beattie <Jess.Beattie@terraecat.co.nz>; IT Service Desk <ServiceDesk@terraecat.co.nz>;

Katrina Lenz <katrina.lenz@goughgroup.co.nz>; Sonia Sherlock <Sonia.Sherlock@terraecat.co.nz>

Subject: RE: [IT Service Desk] Re: removing GST on antarctic nz a/c 3010347 for service call 260950

I think that is a good idea as I played with the original call today as well.

Thanks

Sue Petersen

Business Analyst - Terra Cat

24 Amyes Road, Hornby, PO Box 16-168, Christchurch, 8441

M: +64274870656 |

E: Sue.Petersen@terraecat.co.nz | W: terraecat.co.nz |  



From: Geoff Clapp <Geoff.Clapp@terraecat.co.nz>

Sent: Thursday, 21 April 2022 3:13 pm

To: Darren Fleck <Darren.Fleck@terraecat.co.nz>; IT Service Desk <support+id334493@itsdterraecat.zendesk.com>

Cc: Jess Beattie <Jess.Beattie@terraecat.co.nz>; Sue Petersen <Sue.Petersen@terraecat.co.nz>; IT Service Desk <ServiceDesk@terraecat.co.nz>; Katrina Lenz <katrina.lenz@goughgroup.co.nz>; Sonia Sherlock <Sonia.Sherlock@terraecat.co.nz>

Subject: RE: [IT Service Desk] Re: removing GST on antarctic nz a/c 3010347 for service call 260950

Wondering if we might be best to wait till tomorrow when we can start with a clean slate... Update the project contract to zero rated and update the customer to zero rated (both in sandbox) then try invoicing the segments in sandbox (zero rating them as well) – if that works we can mirror in production...

Total calculated GST amount: -132.00

Total actual GST amount: -132.00

Overview

General

Adjustment

<input type="checkbox"/>	GST code	Quantity	Amount origin	Adjusted amount origin	Percent	Calculated GST amount	Actual GST amount	Override calculated GST	GST direction	Exempt
	GST	0.00	-880.00	0.00	15.00000	-132.00	-132.00	<input type="checkbox"/>	GST payable	<input type="checkbox"/>
	Zero	0.00	240.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	240.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	120.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
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	Zero	0.00	360.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	600.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	120.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
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	Zero	0.00	120.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	600.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	360.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	120.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	120.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	360.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	360.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	120.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	600.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	600.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	360.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>

Kinda looks like the system is taking the GST off the GST amount resulting in the negative ???

Darren Fleck

Component Rebuild Centre Manager - Terra Cat

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M: +64292968270 | **DDI:** +6439832376

E: Darren.Fleck@terraecat.co.nz | **W:** terraecat.co.nz |  



From: Jess Beattie (IT Service Desk) <support@itsdterraecat.zendesk.com>

Sent: Thursday, 21 April 2022 2:05 pm

To: Geoff Clapp <Geoff.Clapp@terraecat.co.nz>

Cc: Jess Beattie <Jess.Beattie@terraecat.co.nz>; Sue Petersen <Sue.Petersen@terraecat.co.nz>; IT Service Desk <ServiceDesk@terraecat.co.nz>; Katrina Lenz <katrina.lenz@goughgroup.co.nz>; Sonia Sherlock <Sonia.Sherlock@terraecat.co.nz>; Darren Fleck <Darren.Fleck@terraecat.co.nz>

Subject: [IT Service Desk] Re: removing GST on antartic nz a/c 3010347 for service call 260950

Your request (334493) has been updated. To add additional comments, reply to this email.

Jess Beattie (ITSD - Terra Cat)

21/04/2022, 14:05 NZST

Hey Darren,

With the help Geoff, I have changed the GST group on the project contract to zero in Sandbox for you to test out first before we make the change in Prod, provided it works. Please could you open Sandbox and try it in there :)

Let us know how you get on

Kind regards,

Jess Beattie

Service Desk Analyst - Terra Cat

24 Amyes Road, PO Box 16168, Christchurch, 8042

P: 08000 95 95 98 E: Jess.Beattie@terraecat.co.nz W: terraecat.co.nz

Geoff Clapp

21/04/2022, 13:59 NZST

Hi All,

I believe if we remove the GST on the project contract it will then it may allow the GST – the field is locked and can only be changed by IT. Suggest we do this in Sandbox to see if this works...

Microsoft Dynamics AX - Gough Group [CHCPRDAOS07: Session ID - 1363] - [1 - ggnz]

GGNZ > Project management and accounting > Common > Projects > Project contracts

File > Project contract > Plan > Maintain > Control

Delete Hours Expenses Hours Expenses Projects Refresh Export to Microsoft Excel Attachments

Maintain Cost prices Sales prices Related i... List Attachments

Favourites

- My favourites
- Project management and accounting
 - Area page
- Common
 - Projects
 - All projects
 - My projects
 - Project contracts

Project contracts (Unsaved filter)

Project contract ID	Name	Customer account	Customer name	GST group	Sales currency	Invoice frequency
3010347						
3010347	Antarctica New Zealand	3010347	Antarctica New Zealand	GST	NZD	Daily

Regards

Geoff Clapp
Support Services Manager - Terra Cat
 24 Amyes Road, Hornby, PO Box 16168, Christchurch, 8441
M: +64292009044 **DDI:** +6439832468
W: terracat.co.nz | [Facebook](#) [Instagram](#)



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[K7YZ42-QOP6]

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Geoff Clapp

21/04/2022, 15:12 NZST

Wondering if we might be best to wait till tomorrow when we can start with a clean slate... Update the project contract to zero rated and update the customer to zero rated (both in sandbox) then try invoicing the segments in sandbox (zero rating them as well) – if that works we can mirror in production...

Regards, Geoff Clapp

From: Darren Fleck <Darren.Fleck@terracat.co.nz>
Sent: Thursday, 21 April 2022 3:00 pm
To: IT Service Desk <support+id334493@itsdterracat.zendesk.com>; Geoff Clapp <Geoff.Clapp@terracat.co.nz>
Cc: Jess Beattie <Jess.Beattie@terracat.co.nz>; Sue Petersen <Sue.Petersen@terracat.co.nz>; IT Service Desk <ServiceDesk@terracat.co.nz>; Katrina Lenz <katrina.lenz@goughgroup.co.nz>; Sonia Sherlock <Sonia.Sherlock@terracat.co.nz>
Subject: RE: [IT Service Desk] Re: removing GST on antartic nz a/c 3010347 for service call 260950

So so close !!!

As all the transactions were already posted, I have had to transfer all the lines to make them pick up the zero rated gst setting change. Transferred from SC260950-09 to SC260950-09

I am now getting a negative rather than a zero ???

			Total Labour on segment	\$5,600.00
			SC260950-09 Total:	\$5,600.00
	Parts	Labour	Misc.	Total
SC260950-09		\$5,600.00		\$5,600.00
Segment Totals				
Net Sub Total				\$5,600.00
GST				-\$132.00
Total NZD				\$5,468.00

When I click on the GST button in the invoice proposal screen

Invoice proposal: PIP00419461, 3010347, Call number: SC260950

Invoice proposal: PIP00419461
 Invoice date: 21/04/2022
 Project contract ID: 3010347

Customer's PO number: 026308
 Tax Invoice:
 Project contract name: Antarctica New Zealand

Funding source: Antarctica New Zealand
 Sales currency: NZD
 Business area: AR Revenue

Invoice proposal transactions

Hour	Fee
11/01/2022	sc260950-09 LBR-FLD -REV-RR Jack Linley Transaction... 5.00 800.00
11/01/2022	sc260950-09 LBR-FLD -REV-RR Jack Linley Transaction... 1.00 120.00

I see these lines, the top one looks to be causing the negative seen on the proforma

Total calculated GST amount: -132.00

Total actual GST amount: -132.00

Overview

General

Adjustment

<input type="checkbox"/> GST code	Quantity	Amount origin	Adjusted amount origin	Percent	Calculated GST amount	Actual GST amount	Override calculated GST	GST direction	Exempt
GST	0.00	-880.00	0.00	15.00000	-132.00	-132.00	<input type="checkbox"/>	GST payable	<input type="checkbox"/>
Zero	0.00	240.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
Zero	0.00	240.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
Zero	0.00	120.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
Zero	0.00	240.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
Zero	0.00	240.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
Zero	0.00	360.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
Zero	0.00	600.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
Zero	0.00	120.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
Zero	0.00	600.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
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Zero	0.00	120.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
Zero	0.00	360.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
Zero	0.00	360.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
Zero	0.00	120.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
Zero	0.00	600.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
Zero	0.00	600.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
Zero	0.00	360.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>

Kinda looks like the system is taking the GST off the GST amount resulting in the negative ???

Darren Fleck

Component Rebuild Centre Manager - Terra Cat

Branston Street, PO Box 16168, Christchurch, 8441

M: +64292968270 | **DDI:** +6439832376

E: Darren.Fleck@terracat.co.nz | **W:** terracat.co.nz | 

Jess Beattie April 22, 2022 at 14:39

Awesome stuff. I have now reverted the change on the Project Contract to GST

Kind regards,

Jess Beattie

Service Desk Analyst - Terra Cat

24 Amyes Road, PO Box 16168, Christchurch, 8042

P: 08000 95 95 98 E: Jess.Beattie@terracat.co.nz W: terracat.co.nz

Geoff Clapp April 22, 2022 at 15:05

Hi,

I've amended the GST setting back to normal for the cust in Prod.

Regards, Geoff Clapp

From: Darren Fleck <Darren.Fleck@terracat.co.nz>

Sent: Friday, 22 April 2022 2:27 pm

To: Geoff Clapp <Geoff.Clapp@terracat.co.nz>; IT Service Desk <support+id334493@itsdterracat.zendesk.com>

Cc: Sue Petersen <Sue.Petersen@terracat.co.nz>; IT Service Desk <ServiceDesk@terracat.co.nz>; Katrina Lenz <katrina.lenz@goughgroup.co.nz>; Sonia Sherlock <Sonia.Sherlock@terracat.co.nz>

Subject: RE: [IT Service Desk] Re: removing GST on antartic nz a/c 3010347 for service call 260950

Thanks Everyone

I have the three Zero rated proforma invoices that the customer requires, account changes can be reversed.

Appreciate your assistance

Have a great long weekend



Regards

Darren Fleck

Component Rebuild Centre Manager - Terra Cat

Branston Street, PO Box 16168, Christchurch, 8441

M: +64292968270 | **DDI:** +6439832376

E: Darren.Fleck@terracat.co.nz | **W:** terracat.co.nz |  



From: Geoff Clapp <Geoff.Clapp@terracat.co.nz>

Sent: Friday, 22 April 2022 2:03 pm

To: Darren Fleck <Darren.Fleck@terracat.co.nz>; IT Service Desk <support+id334493@itsdterracat.zendesk.com>

Cc: Sue Petersen <Sue.Petersen@terracat.co.nz>; IT Service Desk <ServiceDesk@terracat.co.nz>; Katrina Lenz <katrina.lenz@goughgroup.co.nz>; Sonia Sherlock <Sonia.Sherlock@terracat.co.nz>

Subject: RE: [IT Service Desk] Re: removing GST on antartic nz a/c 3010347 for service call 260950

Hi All,

I've updated the cust GST setting to zero rated in Prod . Just needs Jess to update the Project Contract.

Subject: RE: [IT Service Desk] Re: removing GST on antarctic nz a/c 3010347 for service call 260950

Afternoon All

I have now invoiced out all the segments to Antarctica NZ that are to include GST (in production)

Jess

Could you change the account setting in production and I will invoice out the last three segments that are to be GST zero rated. As soon as I have the invoices produced I will let you know so you can change it back

Segments to be zero rated are;

SC236933-14

SC260970-09

SC260975-06

Thanks

Darren Fleck

Component Rebuild Centre Manager - Terra Cat

Branston Street, PO Box 16168, Christchurch, 8441

M: +64292968270 | **DDI:** +6439832376

E: Darren.Fleck@terraecat.co.nz | **W:** terraecat.co.nz |  



From: Geoff Clapp <Geoff.Clapp@terraecat.co.nz>

Sent: Friday, 22 April 2022 9:35 am

To: IT Service Desk <support+id334493@itsdterraecat.zendesk.com>

Cc: Sue Petersen <Sue.Petersen@terraecat.co.nz>; IT Service Desk <ServiceDesk@terraecat.co.nz>; Katrina Lenz <katrina.lenz@goughgroup.co.nz>; Sonia Sherlock <Sonia.Sherlock@terraecat.co.nz>; Darren Fleck <Darren.Fleck@terraecat.co.nz>

Subject: RE: [IT Service Desk] Re: removing GST on antartic nz a/c 3010347 for service call 260950

Hi,

I have set the CUST to zero rated in sandbox.

All customers (Unsaved filter) Customer account

Customer account	Invoice acco...	Name	Invoicin...	Credit hold reason	Customer group	GST g
3010347		Antarctica New Zealand	No		EXT - NZ	Zero

3010347 : Antarctica New Zealand

Customer group: EXT - NZ Terms of payment: 0120

Credit limit: 1,791,597.99 Method of payment: Cheque

Delivery terms: Payment schedule:

GST group: Zero Modified date and time: 22/04/2022 09:29:55 am

Settlement discount: Modified by: geoff

Regards, Geoff Clapp

From: Jess Beattie (IT Service Desk) <support@itsdterracat.zendesk.com>

Sent: Friday, 22 April 2022 9:23 am

To: Geoff Clapp <Geoff.Clapp@terracat.co.nz>

Cc: Sue Petersen <Sue.Petersen@terracat.co.nz>; IT Service Desk <ServiceDesk@terracat.co.nz>; Katrina Lenz <katrina.lenz@goughgroup.co.nz>; Sonia Sherlock <Sonia.Sherlock@terracat.co.nz>; Darren Fleck <Darren.Fleck@terracat.co.nz>

Subject: [IT Service Desk] Re: removing GST on antartic nz a/c 3010347 for service call 260950

Your request (334493) has been updated. To add additional comments, reply to this email.

Jess Beattie (ITSD - Terra Cat)

22/04/2022, 9:22 NZST

I have now changed the Project contract to zero in Sandbox to be tested again :)

Kind regards,

Jess Beattie

Service Desk Analyst - Terra Cat

24 Amyes Road, PO Box 16168, Christchurch, 8042

P: 08000 95 95 98 E: Jess.Beattie@terracat.co.nz W: terracat.co.nz

Darren Fleck

21/04/2022, 16:27 NZST

OK I think we are there..

Once the proforma is produced. I used the GST button in the invoice proposal screen

In the adjustment tab, select over ride and adjust actual GST to 0.00

Temporary GST transactions (1 - ggnz) - Invoice proposal: PJP00419469, 3010347, Call number: SC260975

File ▾

Total calculated GST amount: 840.00 Total actual GST amount: 0.00

Overview General Adjustment

<input type="checkbox"/>	GST code	GST direction	Currency	Amount origin	Adjusted amount origin	Calculated GST charge	Actual GST charge	Calculated GST amount	Actual GST amount	Override calculated GST
	▼	▼	▼							▼
	GST	GST payable	NZD	5,600.00	0.00	0.00	0.00	840.00	0.00	<input checked="" type="checkbox"/>

Proforma still shows GST, but if I post it the invoice has no GST



Antarctica New Zealand

Tax Invoice

Invoice Number P100292111
Invoice Date 21/04/2022
GST Number 10-615-607

	Parts	Labour	Misc.	Total
SC260975-06		\$5,600.00		\$5,600.00
Segment Totals		\$5,600.00		

Net Sub Total	\$5,600.00
GST	\$0.00
Total	\$5,600.00

I re-invoiced the same segment without changing the GST in the proposal screen and invoice has GST showing.



Antarctica New Zealand

Tax Invoice

Invoice Number P100292112
Invoice Date 21/04/2022
GST Number 10-615-607

	Parts	Labour	Misc.	Total
SC260975-06		\$5,600.00		\$5,600.00
Segment Totals		\$5,600.00		
Net Sub Total				\$5,600.00
GST				\$840.00
Total				\$6,440.00

Looks like the change made to the customer account allows you to remove the GST as required rather than from every invoice.



Could be handy on this account 😊

Darren Fleck

Component Rebuild Centre Manager - Terra Cat

Branston Street, PO Box 16168, Christchurch, 8441

M: +64292968270 | DDI: +6439832376

E: Darren.Fleck@terraecat.co.nz | W: terraecat.co.nz |  



From: Sue Petersen <Sue.Petersen@terraecat.co.nz>

Sent: Thursday, 21 April 2022 3:15 pm

To: Geoff Clapp <Geoff.Clapp@terraecat.co.nz>; Darren Fleck <Darren.Fleck@terraecat.co.nz>; IT Service Desk <support+id334493@itsdterraecat.zendesk.com>

Cc: Jess Beattie <Jess.Beattie@terraecat.co.nz>; IT Service Desk <ServiceDesk@terraecat.co.nz>;

Katrina Lenz <katrina.lenz@goughgroup.co.nz>; Sonia Sherlock <Sonia.Sherlock@terraecat.co.nz>

Subject: RE: [IT Service Desk] Re: removing GST on antarctic nz a/c 3010347 for service call 260950

I think that is a good idea as I played with the original call today as well.

Thanks

Sue Petersen

Business Analyst - Terra Cat

24 Amyes Road, Hornby, PO Box 16-168, Christchurch, 8441

M: +64274870656 |

E: Sue.Petersen@terraecat.co.nz | W: terraecat.co.nz |  



From: Geoff Clapp <Geoff.Clapp@terraecat.co.nz>

Sent: Thursday, 21 April 2022 3:13 pm

To: Darren Fleck <Darren.Fleck@terraecat.co.nz>; IT Service Desk <support+id334493@itsdterraecat.zendesk.com>

Cc: Jess Beattie <Jess.Beattie@terraecat.co.nz>; Sue Petersen <Sue.Petersen@terraecat.co.nz>; IT Service Desk <ServiceDesk@terraecat.co.nz>; Katrina Lenz <katrina.lenz@goughgroup.co.nz>; Sonia Sherlock <Sonia.Sherlock@terraecat.co.nz>

Subject: RE: [IT Service Desk] Re: removing GST on antarctic nz a/c 3010347 for service call 260950

Wondering if we might be best to wait till tomorrow when we can start with a clean slate... Update the project contract to zero rated and update the customer to zero rated (both in sandbox) then try invoicing the segments in sandbox (zero rating them as well) – if that works we can mirror in production...

Total calculated GST amount: -132.00

Total actual GST amount: -132.00

Overview

General

Adjustment

<input type="checkbox"/>	GST code	Quantity	Amount origin	Adjusted amount origin	Percent	Calculated GST amount	Actual GST amount	Override calculated GST	GST direction	Exempt
	GST	0.00	-880.00	0.00	15.00000	-132.00	-132.00	<input type="checkbox"/>	GST payable	<input type="checkbox"/>
	Zero	0.00	240.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	240.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	120.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
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	Zero	0.00	240.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	360.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	600.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	120.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
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	Zero	0.00	360.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	120.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
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	Zero	0.00	360.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	360.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	120.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
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	Zero	0.00	600.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>
	Zero	0.00	360.00	0.00	0.00000	0.00	0.00	<input type="checkbox"/>	Tax-free sale	<input checked="" type="checkbox"/>

Kinda looks like the system is taking the GST off the GST amount resulting in the negative ???

Darren Fleck

Component Rebuild Centre Manager - Terra Cat

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Sent: Thursday, 21 April 2022 2:05 pm

To: Geoff Clapp <Geoff.Clapp@terraecat.co.nz>

Cc: Jess Beattie <Jess.Beattie@terraecat.co.nz>; Sue Petersen <Sue.Petersen@terraecat.co.nz>; IT Service Desk <ServiceDesk@terraecat.co.nz>; Katrina Lenz <katrina.lenz@goughgroup.co.nz>; Sonia Sherlock <Sonia.Sherlock@terraecat.co.nz>; Darren Fleck <Darren.Fleck@terraecat.co.nz>

Subject: [IT Service Desk] Re: removing GST on antartic nz a/c 3010347 for service call 260950

Your request (334493) has been updated. To add additional comments, reply to this email.

Jess Beattie (ITSD - Terra Cat)

21/04/2022, 14:05 NZST

Hey Darren,

With the help Geoff, I have changed the GST group on the project contract to zero in Sandbox for you to test out first before we make the change in Prod, provided it works. Please could you open Sandbox and try it in there :) Let us know how you get on

Kind regards,

Jess Beattie

Service Desk Analyst - Terra Cat

24 Amyes Road, PO Box 16168, Christchurch, 8042

P: 08000 95 95 98 E: Jess.Beattie@terraecat.co.nz W: terraecat.co.nz

Geoff Clapp

21/04/2022, 13:59 NZST

Hi All,

I believe if we remove the GST on the project contract it will then it may allow the GST – the field is locked and can only be changed by IT. Suggest we do this in Sandbox to see if this works...

Microsoft Dynamics AX - Gough Group [CHCPRDAOS07: Session ID - 1363] - [1 - ggnz]

GGNZ > Project management and accounting > Common > Projects > Project contracts

File > Project contract > Plan > Maintain > Control

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Maintain Cost prices Sales prices Related i... List Attachments

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Project contracts (Unsaved filter)

Project contract ID	Name	Customer account	Customer name	GST group	Sales currency	Invoice frequency
3010347						
3010347	Antarctica New Zealand	3010347	Antarctica New Zealand	GST	NZD	Daily

Regards

Geoff Clapp
Support Services Manager - Terra Cat
 24 Amyes Road, Hornby, PO Box 16168, Christchurch, 8441
M: +64292009044 **DDI:** +6439832468
W: terracat.co.nz | [Facebook](#) [Instagram](#)



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Geoff Clapp

21/04/2022, 15:12 NZST

Wondering if we might be best to wait till tomorrow when we can start with a clean slate... Update the project contract to zero rated and update the customer to zero rated (both in sandbox) then try invoicing the segments in sandbox (zero rating them as well) – if that works we can mirror in production...

Regards, Geoff Clapp

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Sent: Thursday, 21 April 2022 3:00 pm

To: IT Service Desk <support+id334493@itsdterracat.zendesk.com>; Geoff Clapp
<Geoff.Clapp@terracat.co.nz>

Cc: Jess Beattie <Jess.Beattie@terracat.co.nz>; Sue Petersen <Sue.Petersen@terracat.co.nz>; IT
Service Desk <ServiceDesk@terracat.co.nz>; Katrina Lenz <katrina.lenz@goughgroup.co.nz>; Sonia
Sherlock <Sonia.Sherlock@terracat.co.nz>

Subject: RE: [IT Service Desk] Re: removing GST on antartic nz a/c 3010347 for service call 260950

So so close !!!

As all the transactions were already posted, I have had to transfer all the lines to make them pick up the zero rated gst setting change. Transferred from SC260950-09 to SC260950-09

I am now getting a negative rather than a zero ???