

Adjusting / Removing Taxes in QuickBooks

Taxes for your customers are set up within Fuse5 using a combination of account, product, and location settings. It is not necessary to charge taxes for transactions occurring in Fuse5 using QuickBooks.

When an invoice pushes from Fuse5 to QuickBooks (via pushing your End of Day to QuickBooks) you will see an invoice in QuickBooks that shows the tax code selected.

The screenshot shows a QuickBooks invoice form. At the top, the 'CUSTOMER JOB' is 'Fuse5 EOD Push', 'ACCOUNT' is '1030 - Accounts Receivable', and 'TEMPLATE' is 'Fuse5 Invoice'. The 'Invoice' title is highlighted with a red box. The 'DATE' is '17/03/2014' and 'INVOICE #' is '1ca0317'. The 'SHIP TO' field is empty. Below this, there are fields for 'P.O. NO.', 'TERMS', 'REP', 'SHIP', 'VIA', and 'F.O.B.'. The main table has columns: ITEM, CORE PRI., LABOR PRI., FREIGHT PRI., TAX AMT, SELL PR., DESCRIPTION, QUANTITY, PRICE EACH, MISC PRI., AMOUNT, and TAX. The table contains five rows of items, all with a quantity of 1. The 'TAX' column is highlighted with a red box. The 'TAX' column shows 'G' for all items. Below the table, there is a 'CUSTOMER MESSAGE' field and a 'CUSTOMER TAX CODE' dropdown. The 'TOTAL' is '9.19', 'PAYMENTS APPLIED' is '0.00', and 'BALANCE DUE' is '9.19'. The 'GST 5.0%' field is highlighted with a red box and shows '0.44'. The 'Save & Close', 'Save & New', and 'Revert' buttons are at the bottom right.

ITEM	CORE PRI.	LABOR PRI.	FREIGHT PRI.	TAX AMT	SELL PR.	DESCRIPTION	QUANTITY	PRICE EACH	MISC PRI.	AMOUNT	TAX
SO-PARTS	0	0	0	0	8.33	EOD Cash and Check, Date:2014-03-17, Location:Slave Lake	1	8.33		8.33	G
SO-CORES	0.00	0	0	0	0	EOD Cash and Check, Date:2014-03-17, Location:Slave Lake	1	0.00		0.00	G
SO-TAX	0	0	0	0.42	0	EOD Cash and Check, Date:2014-03-17, Location:Slave Lake, TAX	1	0.42		0.42	G
SO-FRT	0	0	0.00	0	0	EOD Cash and Check, Date:2014-03-17, Location:Slave Lake, Freight	1	0.00		0.00	G
SO-LAB	0	0.00	0	0	0	EOD Cash and Check, Date:2014-03-17, Location:Slave Lake, Labor	1	0.00		0.00	G
SO-MSC	0	0	0	0	0	EOD Cash and Check, Date:2014-03-17, Location:Slave Lake, Misc. SO Fee	1	0.00		0.00	G

TOTAL 9.19
PAYMENTS APPLIED 0.00
BALANCE DUE 9.19

Save & Close Save & New Revert

You do not want taxes being added to the invoice in QuickBooks and there are three settings you can go to to ensure that taxes are not being added.

1. Go to "Edit" => "Preferences" => "Sales Tax".

Preferences

My Preferences Company Preferences

Do you charge sales tax? ☒ Yes ☐ No

CUSTOMER AND VENDOR TAX CODES

☒ Use Customer Tax Codes
☐ Use Vendor Tax Codes

DISPLAY TAXES

☒ Allow tax inclusive (gross) prices and costs to be entered.
☐ Only display tax total on transactions.

ASSIGN SALES TAX CODES

Choose the sales tax code you use most often for

Taxable items: G Non-taxable items: E

OK Cancel Help Default

Also See: General

2. Go to "List" => "Item List".

Motorman Parts & Service Ltd. - QuickBooks Pro - [Item List]

File Edit View Lists Favourites Company Sales Tax Customers Vendors Employees Banking Reports Window Help

Home Income Tracker Calendar Search Snapshots Customers Vendors Employees Bank Feeds Docs Reports Live Community Help Feedback Services Add Payroll Credit Cards

Look for: in All fields Search Reset Search within results

Change 5.0% to 0.0%

NAME	DESCRIPTION	TYPE	ACCOUNT	PRICE	ATTACH
• SO-CORES		Service	3888 - Revenue Core Charges	0.00	
• SO-FRT		Service	3887 - Freight Charges	0.00	
• SO-LAB		Service	3000 - Revenue Labour	0.00	
• SO-MSC		Service	3026 - Revenue Merchandise	0.00	
• SO-PARTS		Service	3020 - Revenue Merchandise	0.00	
• SO-TAX		Service	2022 - Tax (GST) Paid Out	0.00	
• GST (ITC)	GST on purchases (Input Tax Credit)	Sales Tax Item	2016 - GST Payable	5.0%	
• GST (ITC) Adjustments	GST Adjustments on purchases (Input Tax Credit)	Sales Tax Item	2016 - GST Payable	0.00	
• GST (ITC) Zero Rated	GST on Zero Rated purchases (Input Tax Credit)	Sales Tax Item	2016 - GST Payable	0.0%	
• GST Adjustments	GST Adjustments on sales	Sales Tax Item	2016 - GST Payable	0.00	
• GST Instalments	GST Instalments and net tax paid	Sales Tax Item	2016 - GST Payable	0.00	
• GST Zero Rated	GST on Zero Rated sales	Sales Tax Item	2016 - GST Payable	0.0%	

3. Go to "Sales Tax" => "Manage Sales Tax".

Tax Accounts and Payments
Click the Pay Now icon, or View to make payments and see sales tax reports.

AGENCY	ACCOUNTS	AMOUNT	AS OF	PAY NOW	SUMMARY REPORT	DETAIL REPORT	EXCEPTION REPORT
Ministère du Revenu	Tax Payable (PST)	0.00	20/03/2014		View	View	View
Receiver General	GST Payable	78.09	20/03/2014		View	View	View

Tax Codes and Rates
Click a tax code in the table below to view its tax rates. Click Change Tax Setup to make changes.

Sales Tax Codes

CODE	DESCRIPTION
G	GST Only
Z	GST Zero Rated
E	Tax Exempt

Sales Tax Items

NAME	TAX RATE	RETURN LINE	TAX RETURN	AGENCY
There are no sales tax items.				

Purchase Tax Items

NAME	TAX RATE	RETURN LINE	TAX RETURN	AGENCY
GST (ITC)	5.00	Line 106 Input tax credits (ITCs)	GST/HST Return	Receiver General

Sales Tax Adjustments
Change the tax you owe:

- [Claim PST compensation or commission](#)
- [Pay an instalment](#)
- [Record a discount or penalty](#)
- [Record bad debt](#)
- [Make other adjustments](#)

[Adjust Tax Owning](#)

Sales Tax Setup
Make changes to your tax codes and corresponding tax rates.

[Change Tax Setup](#)

View and edit tax codes for Items, Vendors, and Customers:

[Assign Tax Codes](#)