Enterprise - How to Recalculate Taxes & Surcharges on an Invoice

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Invoice Editing Options

In Enterprise, there are many different ways to edit invoices. In this article we are going to cover how to update or recalculate sales taxes and surcharges on an invoice.

Other Edit Options Include:

- Enterprise - How to Edit Invoices: Includes manual edits, creating credit/debit memos
- Enterprise - How to Recast an Invoice: To update non-financial information including PO numbers, addresses, etc.
- Enterprise - How to Merge Invoices

Recalculating Taxes & Surcharges

If you look at an invoice to find that sales tax has been applied but shouldn't have or you're missing an ACA surcharge, don't panic! This recalculating option will help you update sales tax information or ACA surcharges on an invoice without creating a Credit or Debit Memo (-1) or requiring a manual edit.

Before you Recalculate

Before you recalculate taxes & surcharges, you will want to fix root cause of this issue. Navigate to the Customer's record, and find the sales tax or ACA surcharge that is incorrect.

For Sales Tax:

Maybe you are missing sales tax on a worksite or maybe it was added accidentally.

1. On the Customer record, select details > worksites
2. Click on the worksite you want to review
3. Click the pencil icon to edit the worksite
4. Click save and continue
5. Remove or add Sales tax before saving
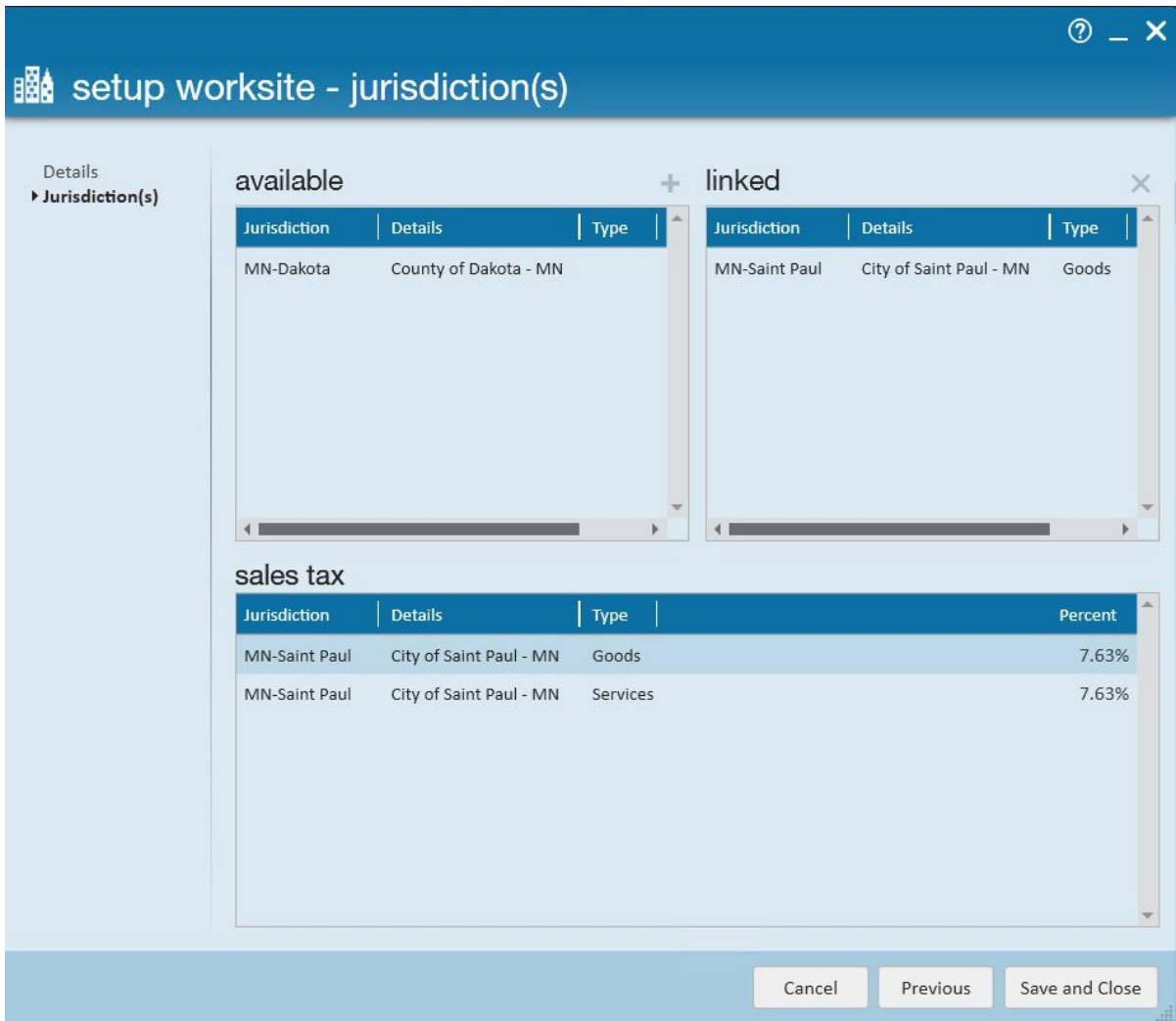
Note Sales tax can also be added to the customer or department record. Check outHow to Set Up Sales Tax on a Customer for more information.
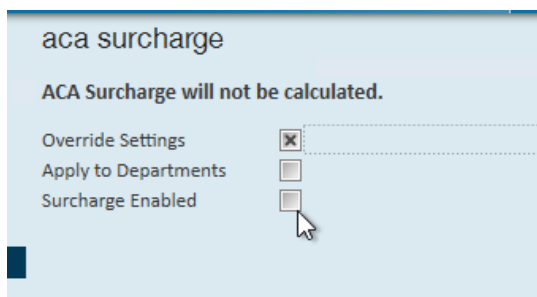
For ACA Surcharges:

Maybe the ACA surcharge for this customer has changed or it wasn't added at all. In either case, you can edit the ACA surcharge on the customer record as long as the ACA surcharge option is enabled in your system.

1. Navigate to the customer or department record that has the wrong ACA surcharge

2. Select Invoice setup > Adjustments on the left

3. Check the box to override the existing ACA Surcharge
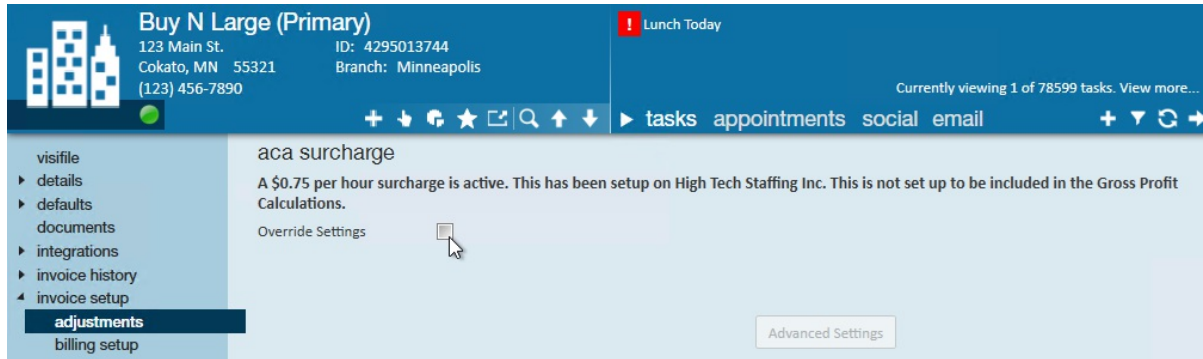
4. Make any additional changes to rate or calculations

Note If you don't see these options, ACA surcharges may not be enabled in your system. For more information, check out Affordable Care Act Surcharges.

To Recalculate Taxes and/or Surcharges on an Invoice

This step can only be done once the corrections have been made to the customer record.

1. Navigate to the invoice you want to recalculate (check out Enterprise - How to Find Processed Invoices)

2. Navigate to the Actions Menu

3. Choose Recalculate Taxes & Surcharges

4. Say Yes when you are prompted to confirm :

TempWorks Enterprise

⚠ **Recalculating Invoice**

Are you sure you wish to recalculate this invoice?

→ Yes

→ No
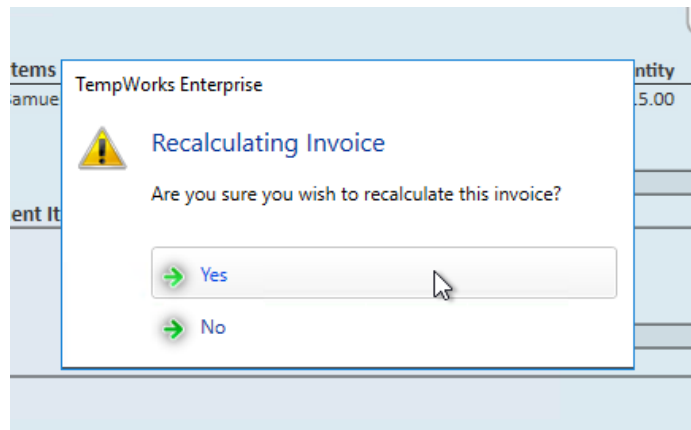
5. A Recalculating message will appear in the lower right:

	$0.00
Total	**$2,755.00**

Recalculating Invoice...
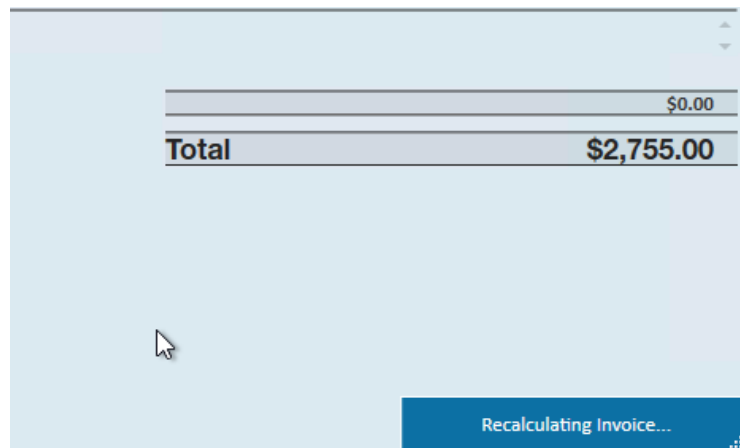
6. When you look at your invoice again, you will see the corrections made to remove the previous charge/transaction and create the new line item in it's place:

Buy N Large (Primary)
123 Main St.
Cokato, MN 55321
(123) 456-7890
ID: 4295013744
Branch: Minneapolis

❗ Lunch Today

Currently viewing 1 of 78599 tasks. View more...

▶ tasks appointments social email

- visifile
- ▶ details
- ▶ defaults
- documents
- ▶ integrations
- ◀ invoice history
  - **invoice detail**
- ▶ invoice setup
- ▶ evaluations
- messages
- payment history
- tasks
- search

Buy N Large
123 Main St.
Cokato, MN, 55321

Invoice Number 48663 **Weekend Bill** 1/19/2020
Invoice Date 1/23/2020 **Pay Date**

Owed Balance	Amount Paid
$2,693.75	$0.00

Invoice Items

		inv num		item	id	quantity	rate	weekend date	total
☐	Adams, Samuel	48663	General Laborer	Reg Hours	80048	15.00	$176.25	1/18/2020	$2,643.75
☒	Adams, Samuel	48663-1	General Laborer	Reg Hours	80999	15.00	$176.25	1/18/2020	$2,643.75
☐	(correction) Adams, Samue	48663-1	General Laborer	Reg Hours	80998	-15.00	$176.25	1/18/2020	($2,643.75)

$2,643.75

Adjustment Items

		inv num	item			rate	weekend date	total
☒		48663				$100.00	1/18/2020	$100.00
☒		48663	ACA Surcharge			$11.25	1/18/2020	$11.25
☒		48663-1				$50.00	1/18/2020	$50.00
☒		48663-1	Credit Card			($100.00)	1/18/2020	($100.00)
☒		48663-1	ACA Surcharge			($11.25)	1/18/2020	($11.25)

$50.00

Tax Items

$0.00

Total	**$2,693.75**

- employee ＋🔍★
- customer
- order
- assignment
- contact
- pay / bill
- calendar
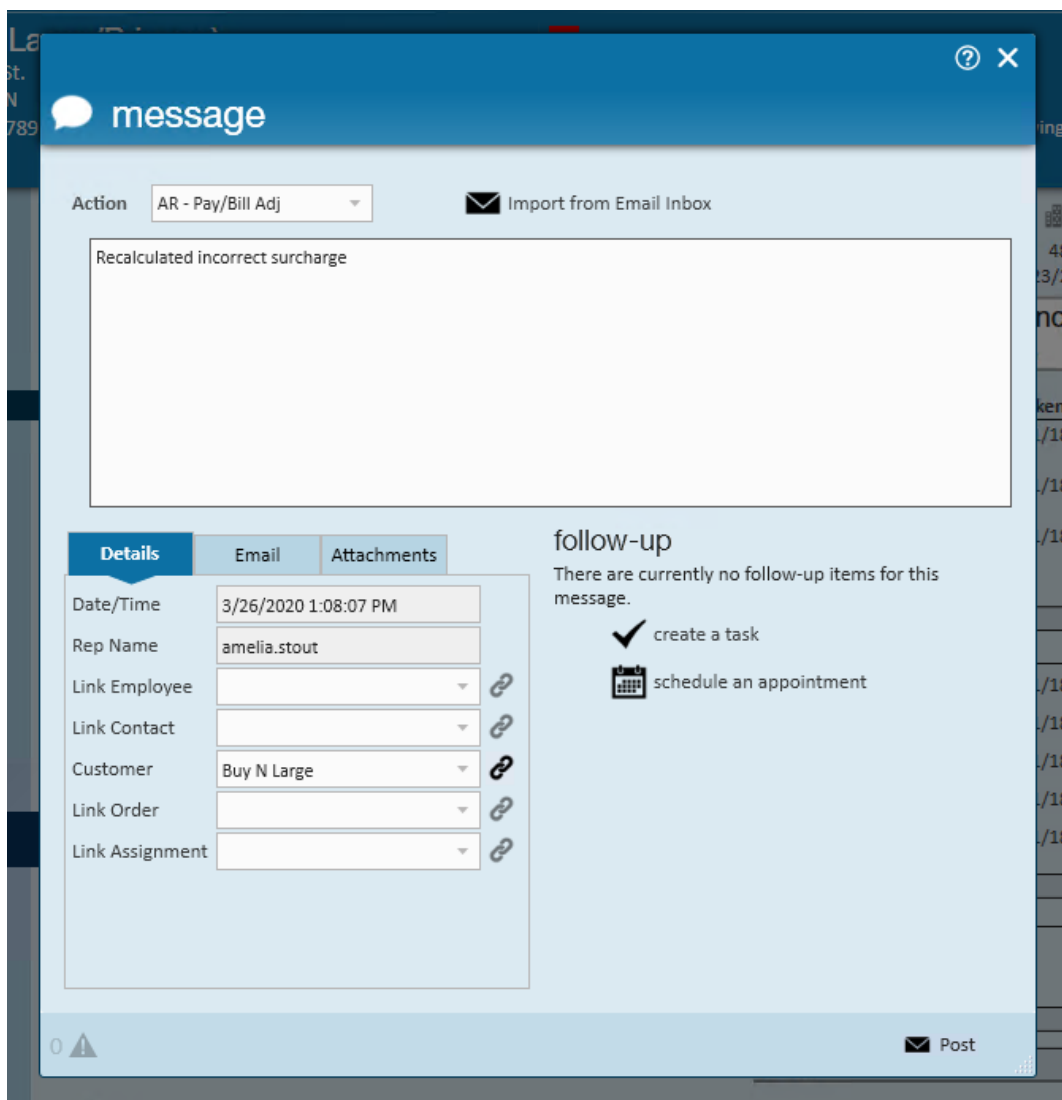- all options ▶

⌄ Extended Invoice Details

When you preview the invoice you will see the correct amounts.

We recommend also logging a message on the invoice to note why this change was made for your records:

1. Select the Message icon in the upper right
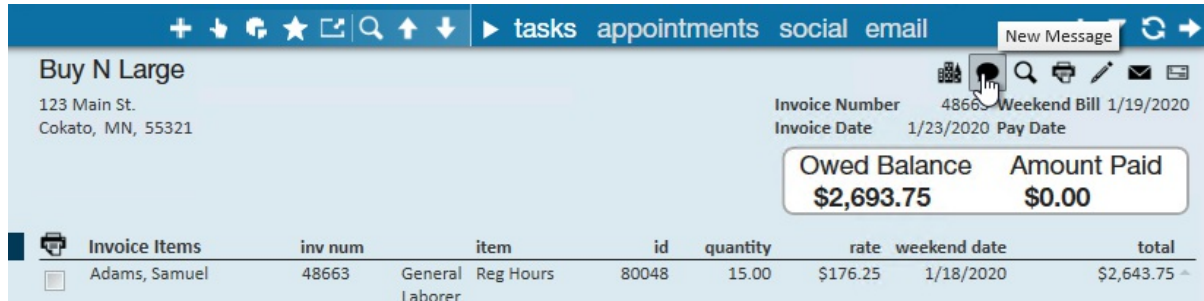
2. Select a message action code and enter a message before clicking post

Messages can be found on the customer record or under the extended invoice details at the bottom of the invoice:

Buy N Large

123 Main St.
Cokato, MN, 55321

Invoice Number	48663	**Weekend Bill**	1/19/2020	
Invoice Date	1/23/2020	**Pay Date**		

Owed Balance	Amount Paid
$2,693.75	**$0.00**

⌃ Extended Invoice Details

Extended Details
Transactions
Email Recipients
Email Log
Payments
Merged Invoices
Messages

Date	Action	Message	Contact	Rep
3/26/2020	AR - Pay/Bill Adj	Recalculated incorrect surcharge		amelia.s...
1/24/2020	Email	Invoices Dated Thursday, January 23, 2020 Hello Hal, Your weekly invoices are attached to this email. Plea... Thank you for your business! Buy N Large	Burton, Hal (Bu...	kayla.br...
1/24/2020	Email	Invoices Dated Thursday, January 23, 2020 Hello Jones, Your weekly invoices are attached to this email. Plea... Thank you for your business! Buy N Large	Dale, Jones (Bu...	kayla.br...
1/24/2020	Email	Invoices Dated Thursday, January 23, 2020 Hello Jack, Your weekly invoices are attached to this email. Plea... Thank you for your business! Buy N Large	Daniels, Jack (B...	kayla.br...

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