

FINX-GEN-100 Advanced Sales Tax Framework (ASX) including
Goods Movement Control - Manual
Streamline and automate tax determination

THE
FUTURE
TODAY

Advanced Sales Tax Framework (ASX)

Global Tax Compliance — Built for Finance Leaders

Tax compliance is no longer just a back office task — it's a strategic risk area. The Advanced Sales Tax Framework (ASX) enhances the standard Microsoft Dynamics 365 Finance sales tax functionality, giving CFOs and finance teams confidence, control, and compliance across every jurisdiction they operate in.

ASX Turns Tax Compliance into a Strategic Advantage

Empower your finance function with global consistency, local accuracy, and full regulatory alignment — directly within Microsoft Dynamics 365 Finance.

Why CFOs Choose ASX



Compliance Without Complexity

Stay compliant with ever-changing tax laws worldwide — without constant manual updates or risk of penalties.



Cross-Border Confidence

Seamlessly handle international and multi-jurisdictional transactions, including origin-and destination-based taxation.



Real-Time Accuracy

Calculate tax for project transactions globally with instant, reliable results — keeping your financials correct and audit-ready.



Risk & Audit Readiness

Automate calculations, minimize human error, and maintain complete audit trails for faster, smoother audits.



Strategic Controls

Manage Sales Tax Coefficient thresholds, variable rates, exemptions, and purpose-based rules to ensure accurate recoverability and compliance reporting.

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Introduction

Quantum Omega Group is a dynamic and forward-thinking provider of Microsoft Dynamics Implementation, Outsourcing, Development, and Consulting Solutions. With an established strong reputation for successful Dynamics implementations across the globe, and a commitment to transparency, effective communication, and quality assurance, Quantum Omega Group simplifies complex processes, reduces risk, and optimized delivery times for its clients. So that you get the results you expect, when you expect them.

1. The Advanced Sales Tax Framework (ASX)

Global businesses face increasingly complex and rapidly changing tax environments. The Advanced Sales Tax Framework (ASX) is designed to extend and strengthen the standard Microsoft Dynamics 365 Finance sales tax functionality, providing finance leaders with confidence in tax determination, compliance, and reporting.

By automating intricate rules, aligning with local business practices, and delivering real-time accuracy, ASX reduces risk exposure and supports CFOs in meeting both regulatory and operational demands.

With ASX, CFOs and finance teams gain a strategic compliance framework that goes beyond standard ERP functionality – ensuring accuracy, efficiency, and governance in every transaction.

Key Benefits:

- » **Compliance with Complex Tax Laws:**
Stay ahead of evolving tax regulations with automated compliance safeguards, minimizing the risk of errors, penalties, or reputational damage.
- » **Cross-Border Transactions:**
Simplify international operations with built-in support for the complexities of cross-border tax determination and reporting.
- » **Real-Time Project Transaction Taxation:**
Enable real-time tax calculations for global project transactions, ensuring accuracy in financial reporting and project profitability tracking.
- » **Enhanced User and Stakeholder Experience:**
Deliver clarity and accuracy in tax information at every step, reducing disputes and supporting smoother customer and supplier interactions.
- » **Risk Mitigation and Control:**
Protect your organization against compliance failures by reducing manual interventions and ensuring reliable, audit-ready tax calculations.
- » **Built-In Audit Trail and Documentation:**
Maintain comprehensive audit trails and documentation, allowing finance teams to demonstrate compliance efficiently during tax audits.

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» **Origin- and Destination-based Taxation**

Automatically apply correct rules for seller-departure and buyer-receipt locations in line with international taxation principles.

» **Purpose based tax calculation:**

Accommodate jurisdictional rules where tax depends not only on shipment origin and destination but also on the intended use of goods or services.

» **Sales Tax Coefficient:**

Support jurisdictions where recoverable sales tax is restricted by regulatory thresholds. ASX calculates the Sales Tax Coefficient percentage (exempt sales tax relative to turnover) to ensure compliance and avoid misstatements or penalties.

» **Variable Rates, Tax Directions, Exemptions and Thresholds:**

Manage complexity by applying differentiated rates, exemptions, or thresholds based on product or service categories.

» **Simplicity and Transparency:**

Ensure full visibility into tax logic and calculations, reducing confusion for finance teams and providing transparency for auditors and stakeholders.

2. Main ASX functions

2.1. Difference between standard, globalization workspace and ASX

The standard sales tax framework in D365 F&O sales tax calculation and reporting rules are based on either the Customer or Vendor setup. However, local, and international Sales Tax rules require that sales tax should be calculated and reported based on the combination of the departure location of the seller and the receipt location of the buyer (also called "goods movement sales tax calculation rules").

As mentioned in the introduction, the Advanced Sales Tax Framework (ASX) complies with this requirement.

To distinguish between the Standard Sales Tax Framework Functions and The Advanced Sales Tax Framework Functions, in this document a standard function is depicted with [STD], whereas the Advanced Sales Tax Framework Function is depicted with [ASX]. In addition, for your convenience we have also added in the next page a matrix comparing the Microsoft Tax Solution (from the Globalization workspace (GW)) and the Microsoft Standard Sales Tax Framework with ASX.

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Tax Applied Process	ASX (The Advanced Sales Tax Framework)	GW (Tax Solution on Globalization Workspace)	SW (Standard Sales Tax Framework)
Project Invoicing (all type of projects)	Supported	Not Supported	Not Supported
Sales Tax Applied rule base on purpose	Supported	Only limited to countries in the "supported list"	Not Supported
Intrastat reporting (correct Tax registration number)	Supported	Not Supported	Not Supported
Local Sales Tax Submission Report	Supported	Only limited to countries in the "supported list"	Only limited to countries in the "supported list"
Automatic Sales tax calculation based on Destination and Departure address	Supported	Requires Low Code programming	Not Supported
Automatic Sales tax deduction calculation based on purpose	Supported	Requires Low Code programming	Not Supported
Sales Tax Coefficient Calculation	Supported	Not Supported	Not Supported

Others	ASX (The Advanced Sales Tax Framework)	GW (Tax Solution on Globalization Workspace)	SW (Standard Sales Tax Framework)
Sales tax calculation incorporated in Dynamics 365 standard framework	Supported	External Calculation	Supported, but with Errors
Security and control to monitor Sales Tax Calculation or adjustments	Supported	Not Supported	Not Supported
Easy and automatic update of sales tax applied rules when local tax regulations change sales tax applied rules	Supported	Needs update in "low code" programming	Not Supported

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2.2. The Advanced Sales Tax Framework

To comply to International and local sales tax rules ASX includes the following main process streams:

1. Fully automated sales tax calculation and reporting rules based on goods movement.
2. Thresholds and exemptions include Delivery terms and Date of applicability.
3. Delivery and Transaction methods, such as: Direct Deliveries, Intercompany, Third-Party Sales Tax Representatives, Project Transactions, Free Text Invoicing, and so on.
4. Risk mitigation: Calculated Sales Tax can only be corrected by a specific set of users, and corrections on sales tax calculated is tracked.

Scenario examples:

- **On the vendor/customer side:**

[STD]: considers the address located on the vendor/vendor (invoice) profile. However, the departure/delivery address is often not that of the vendor/customer but could be a port, the warehouse of a third-party vendor, etc.

[GW]: requires complex low code programming to enable this function which is time consuming and prone to errors.

[ASX]: considers every possible departure address and associated tax registration number.

- **EU Instrastat and EU sales list reports:**

[STD]: VAT registration numbers are taken from the primary (Invoice) address of the customer and vendor.

[GW]: is only supported by when mentioned by Microsoft in the "suppor-

ted list"

[ASX]: VAT registration numbers are derived from the actual departure and destination address.

- **Delivery terms:**

[STD]: allows every possible delivery term.

[GW]: allows every possible delivery term and therefore does not prohibit user errors.

[ASX]: delivery terms can be defined to prevent non-compliance with legal rules. (example: prevent delivery from or to certain locations without a proper sales tax registration number associated to that location)

- **Location specific- and frequently changing sales tax rules:**

[STD]: users must manually correct the calculated sales tax.

[GW]: changing rules require change of low code programming and is therefore time consuming and prone to errors.

[ASX]: supports sales tax calculation and reporting based on detailed address location specifics and applies new sales tax configuration rules automatically.

- **Purpose based sales tax deductibility rules:**

[STD]: users must manually correct the calculated sales tax.

[GW]: requires complex low code programming to enable this function which is time consuming and prone to errors.

[ASX]: automatically selects the deductibility rate based on applied purpose of goods/services procured.

- **Sales Tax Coefficient Calculation:**

[STD]: users must manually correct the calculated sales tax.

[GW]: not supported

[ASX]: automatically selects the deductibility rate based on the Tax Coefficient Percentage.

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2.3. Prerequisites

ASX will only function properly when the following prerequisites are met:

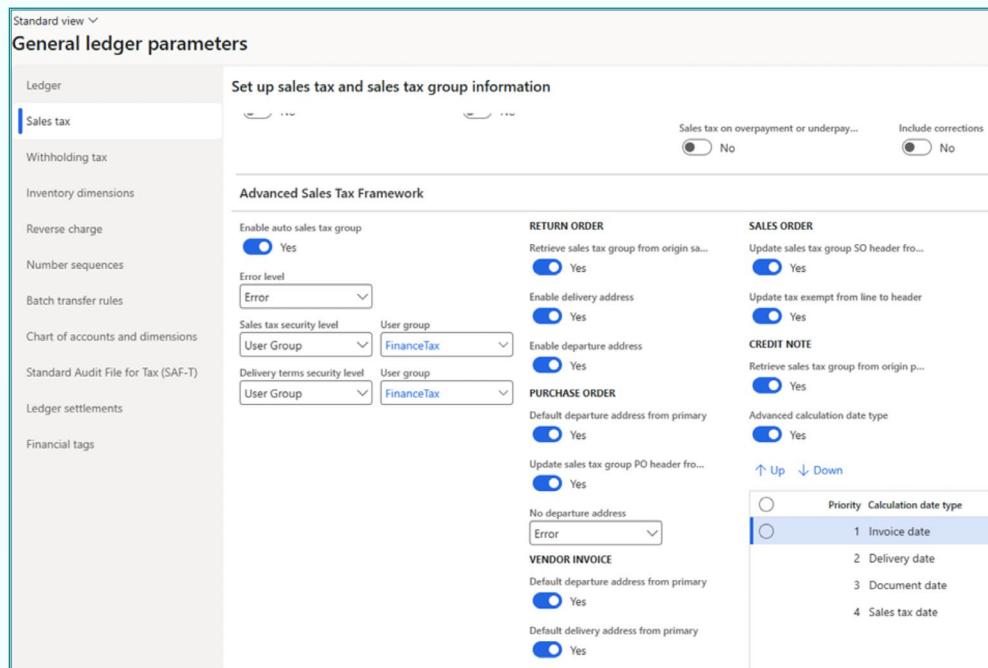
1. Fully configured ASX parameters (see parameter sections)
2. Valid license
3. All ASX modules properly installed.

3. [ASX] Parameters

3.1. Entity specific parameters

The entity specific ASX parameters settings are available under:

Tax -> Setup -> General ledger parameters -> Sales tax:



3.1.1. Enable auto sales tax group

The enable auto sales tax group switchbox defines, for the current entity, when switched on, that the ASX logic is enabled. If switched off, the ASX logic is disabled.

Error level

The error level parameter selects the action when the combination of departure and destination address does not result in a Sales Tax Group found.

Settings:

- » None: when the sales tax group cannot be fetched, the sales tax group defaults to the setting of the sales tax group on the master data field of the selected address.
- » Warning: same as "None", though a warning message is given: "Sales tax group cannot be found for the combination of destination- and departure address. Defaulting to standard setup"
- » Error: Error message is given, and transaction cannot be saved or exited until solved. Error message: "Sales tax group cannot be found for the combination of delivery- and departure address, please fix the error".

3.1.2. Sales tax security level / User Group

This parameter selects the security level of the sales tax group field.

- » All: the sales tax group field cannot be edited.
- » None: the sales tax group field is editable.

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- » User group: the sales tax group field is only editable by the specified user group in the User group field.

3.1.3. Error level delivery term

The error level parameter selects the action when the combination of departure and destination address is not allowed for the associated delivery term.

Settings:

- » None: all delivery terms are allowed; the logic for delivery terms is ignored.
- » Warning: when the input delivery term is not allowed a warning message is given: "Delivery term not allowed for the combination of destination- and departure address"
- » Error: Error message is given, and transaction cannot be saved or exited until solved. Error message: "Delivery term not allowed with the current combination of departure and destination address, please change delivery term".

3.1.4. Delivery terms security level / User Group

This parameter selects the security level of the Delivery terms field.

Settings:

- » All: the delivery terms field cannot be edited.
- » None: the delivery terms field is editable.
- » User group: the delivery terms field is only editable by the specified user group in the User group field.

3.1.5. Return Order:

Retrieve sales tax group from original sales order

This parameter defines the behavior of the Sales tax group when a sales return order is created (see return order section).

Enable delivery address

This parameter defines if the delivery address is editable on the return order if the retrieve sales tax group from original sales order function is switched on.

Enable departure address

This parameter defines if the departure address is editable on the return order if the retrieve sales tax group from original sales order function is switched on.

3.1.6. Purchase order:

Default departure address from primary

If switched on the departure address will be fetched from the primary address of the vendor if not filled in by the user.

Update sales tax group PO header from line

If switched on, each time a PO line is entered and the sales tax group is updated on the line, the sales tax group on the header will be updated with the last updated sales tax group value.

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No departure address

This parameter selects the action when the departure address is not filled in.

Settings:

- » None: no action is taken when the departure address is not filled in.
- » Warning: same as "None", though a warning message is given: "the departure address field is empty, automatic sales tax group calculation is not possible
- » Error: Error message is given, and transaction cannot be saved or exited until solved. Error message: "departure address is blank, please input departure address".

3.1.7. Vendor Invoice

Default departure address from primary

If switched on the departure address will be fetched from the primary address of the vendor.

Help text: not applicable.

Default destination address from primary

If switched on the destination address will be fetched from the primary address of the entity.

Help text: not applicable.

3.1.8. Sales Order

Update sales tax group SO header from line

If switched on, each time a SO line is entered and the sales tax group is updated on the line, the sales tax group on the header will be updated with the last updated sales tax group value.

Update tax registration number from line to header

If switched on, each time a PO line is entered and the sales tax registration number is updated on the line, the sales tax registration number on the header will be updated with the last updated sales tax.

Retrieve sales tax group from original purchase order

This parameter defines the behavior of the Sales tax group when a purchase return order or invoice is created

3.1.9. Advanced Calculation Date Type

If switched on, the sales tax code value date is retrieved based on the order of the priority list. Example: when the invoice date is blank, then the value is based on the delivery date. If the delivery date is blank, then the value date is retrieved based on the document date, and so on.

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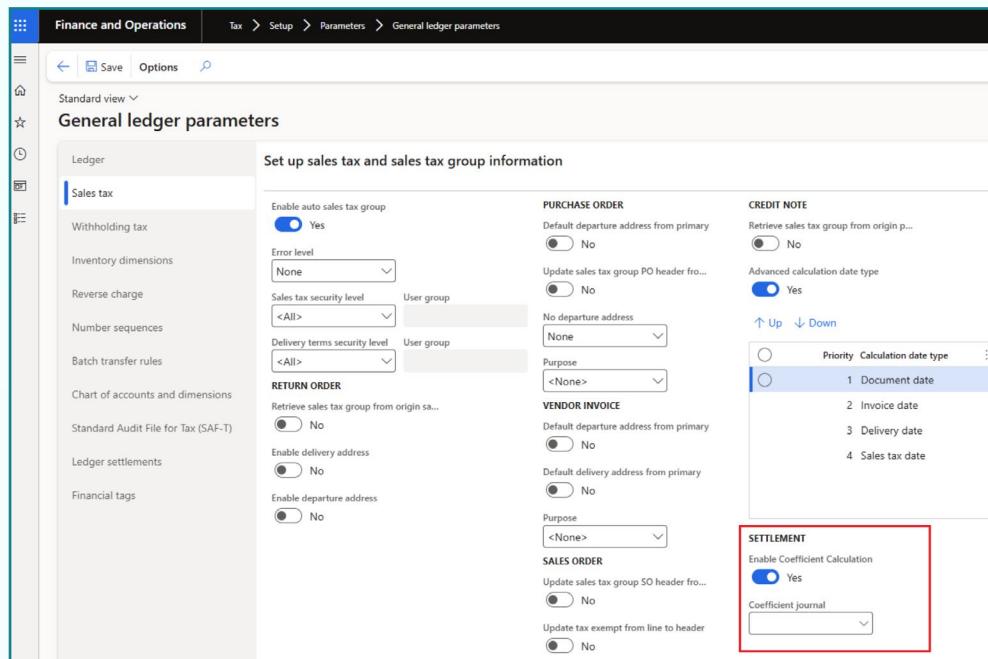
3.1.10. Settlement (Sales Tax Coefficient Percentage)

Enable Coefficient Calculation

If switched on, recoverable sales tax is calculated according to the Sales Tax Coefficient percentage (exempt sales tax relative to turnover) to ensure compliance and avoid misstatements or penalties.

Coefficient Journal

Defines the Coefficient Journal to be used when the additional Coefficient Sales Tax Lines (VAT) are posted.



Finance and Operations > Tax > Setup > Parameters > General ledger parameters

General ledger parameters

Ledger

Sales tax

Withholding tax

Inventory dimensions

Reverse charge

Number sequences

Batch transfer rules

Chart of accounts and dimensions

Standard Audit File for Tax (SAF-T)

Ledger settlements

Financial tags

Set up sales tax and sales tax group information

PURCHASE ORDER

Default departure address from primary: No Yes

Update sales tax group PO header from: No Yes

CREDIT NOTE

Retrieve sales tax group from origin pa...: No Yes

RETURN ORDER

Retrieve sales tax group from origin sa...: No Yes

SALES ORDER

Update sales tax group SO header fro...: No Yes

Update tax exempt from line to header: No Yes

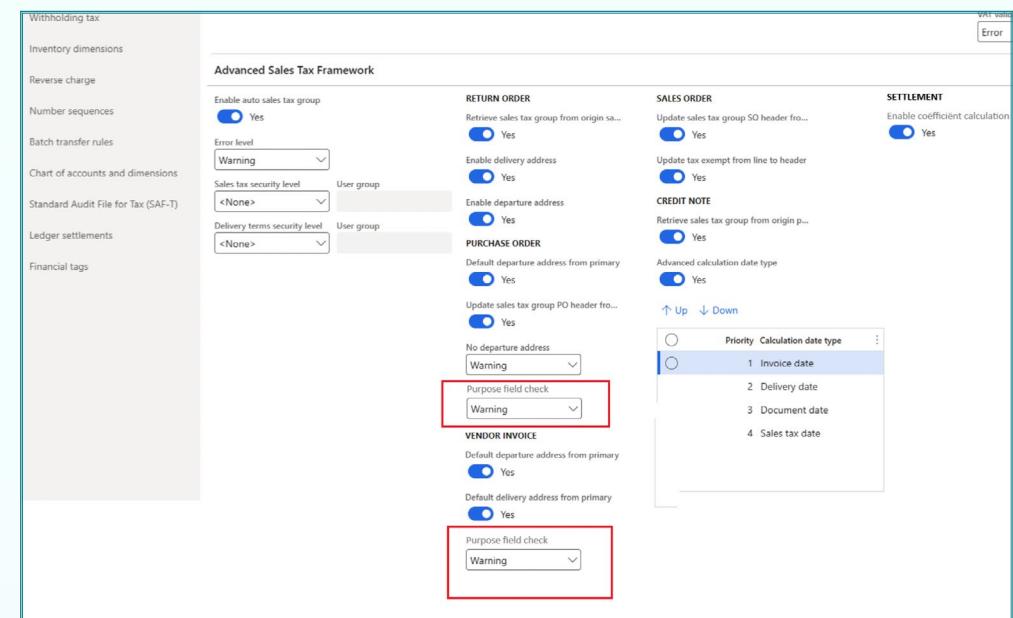
SETTLEMENT

Enable Coefficient Calculation: Yes

Coefficient journal: Coefficient journal (highlighted with a red box)

3.1.11. Purpose

Defines whether the Sales Tax Purpose field must be filled in (value=error), a warning is given when not filled in (value = warning), or is not checked (value = none):



Withholding tax

Inventory dimensions

Reverse charge

Number sequences

Batch transfer rules

Chart of accounts and dimensions

Standard Audit File for Tax (SAF-T)

Ledger settlements

Financial tags

Advanced Sales Tax Framework

RETURN ORDER

Enable auto sales tax group: Yes

Error level: Warning None

Sales tax security level: User group <None>

PURCHASE ORDER

Default departure address from primary: No Yes

Update sales tax group PO header fro...: No Yes

CREDIT NOTE

Retrieve sales tax group from origin p...: No Yes

SALES ORDER

Update sales tax group SO header fro...: No Yes

Update tax exempt from line to header: No Yes

SETTLEMENT

Enable coefficient calculation: Yes

PRIORITY

Priority Calculation date type:

- 1 Document date (highlighted with a red box)
- 2 Invoice date
- 3 Delivery date
- 4 Sales tax date

VENDOR INVOICE

Default departure address from primary: Yes

Default delivery address from primary: Yes

Purpose field check: Warning (highlighted with a red box)

SETTLEMENT

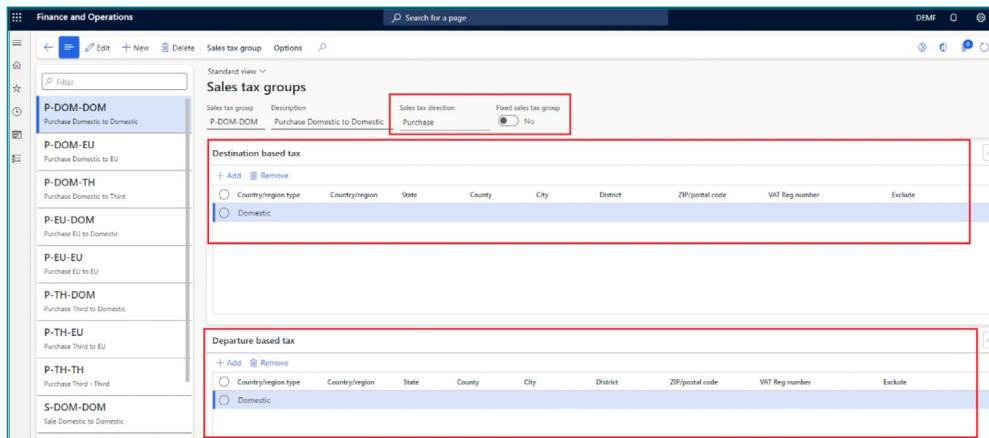
Purpose field check: Warning (highlighted with a red box)

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3.2. Transaction based ASX parameters

3.2.1. Sales tax group form

In the Sales Tax Group form (**path: Tax -> Indirect taxes -> Sales tax -> Sales tax groups**), the ASX configuration on the form is as shown in below picture:



Header:

Sales tax direction values:

- » Both
- » Sales
- » Purchase

Fixed sales tax group values:

- » Yes
- » No

Tabs:

Destination based tax values:

- » Both As shown in picture

Departure based tax values:

- » As shown in picture

3.2.1.1. Sales tax group form logic

Sales tax direction:

ASX identifies whether the combination of departure- and destination address is associated with a sale or a purchase. The field value 'Sales tax direction' defines this.

Fixed sales tax group:

This parameter determines if the Sales tax group value on the Customer- or Vendor address should be updated based on the logic that fetches the Sales tax group based on departure- and destination address. If checked than the logic is disabled.

Departure and Destination tabs:

To fetch the Sales tax group based on departure- and destination address the combination of the values in both tabs define a UNIQUE sales tax group value. Hence, it is not possible to create more than one Sales tax group with the same departure- and destination address combinations, and Sales tax direction.

- » Logic in column values:

the values in the columns of each tab form a unique combination of

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departure- and destination address combination, which is found in the fields (if not blank): Country region type, Country region, State, County, City, District, Zip/Postal code, VAT Reg number, under the following rules:

- If the field has a value, the value is considered.
- If the field is blank, all values for this field are allowed.
- If the field "Exclude" is marked, the values for this line are not allowed for this combination.

Note: the purpose of this field is to exclude smaller areas which are not part of the current Departure- and Destination Address combination.

3.2.1.2. Sales tax group update logic

ASX updates the Sales Tax group automatically and dynamically.

This logic is applied for:

- Sales orders.
- Purchase orders.
- Free text invoices.
- Project invoices.
- Sales return orders.
- Purchase return orders.
- Pending vendor invoices.

The logic is applied every time, a departure address and/or destination address is entered or changed and works as follows: the departure- and destination address on the transaction (line) is compared with the available Sales Tax Group departure- and destination address combination va-

lues on the Sales Tax Group form. If the associated combination is found, the Sales tax group field on the transaction (line) is then updated with the Sales tax group for the unique departure- and destination address combination.

See below example of a sales order line where the departure address is from the site/warehouse in Germany (Blue) and the destination address is of the customer in Italy (Red). When the ASX logic searches for this departure- and destination address combination, it finds the Sales tax group S-DOM-EU (green).

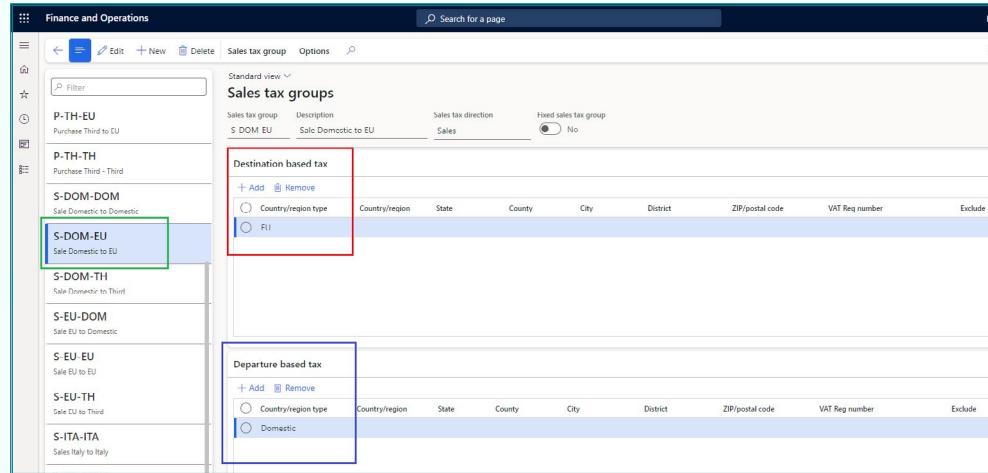
The applied logic is as follows:

- Sales tax direction: Sales
- Destination country/region type: EU
- Departure country/country region type: Domestic (the entity DEMF is in Germany)
- Error level sales tax group: Error Sales order line, address tab:

Line details											
General	Setup	Address	Product	Packing	Delivery	Sourcing	Price and discount	Project	Foreign trade	Financial dimensions	Loads
DELIVERY ADDRESS		Address		Customer registration number		Address		Own registration number			
Name Adventure Works		Via Aurelia 1 Rome, 11111 ITA		IT12923930155		Domstrasse 321 30159 Hannover deu		DE295381486			
Delivery address Adventure Works		[+]		Departure Address Site 1 - DE		Address Domstrasse 321 30159 Hannover deu		Own registration number DE295381486			

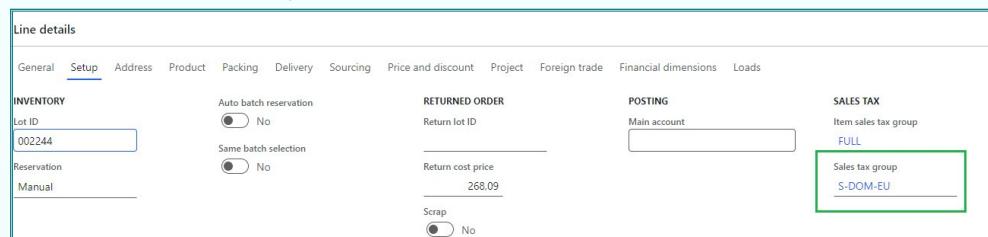
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Sales tax group form:



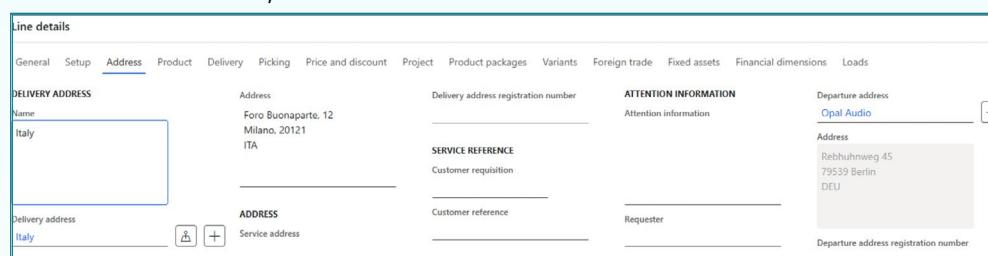
The screenshot shows the 'Sales tax groups' page. On the left, a list of tax groups is shown, with 'S-DOM-EU' highlighted. The main area displays two sections: 'Destination based tax' and 'Departure based tax', both of which are highlighted with red boxes.

Sales order line, setup tab:



The screenshot shows the 'Sales order line, setup tab' page. The 'SALES TAX' section, which includes the 'Sales tax group' field set to 'S-DOM-EU', is highlighted with a green box.

Purchase order line, address tab:



The screenshot shows the 'Purchase order line, address tab' page. The 'DEPARTURE ADDRESS' section, which includes the 'Departure address' field set to 'Opal Audio', is highlighted with a green box.

Pending Vendor Invoice, address tab:

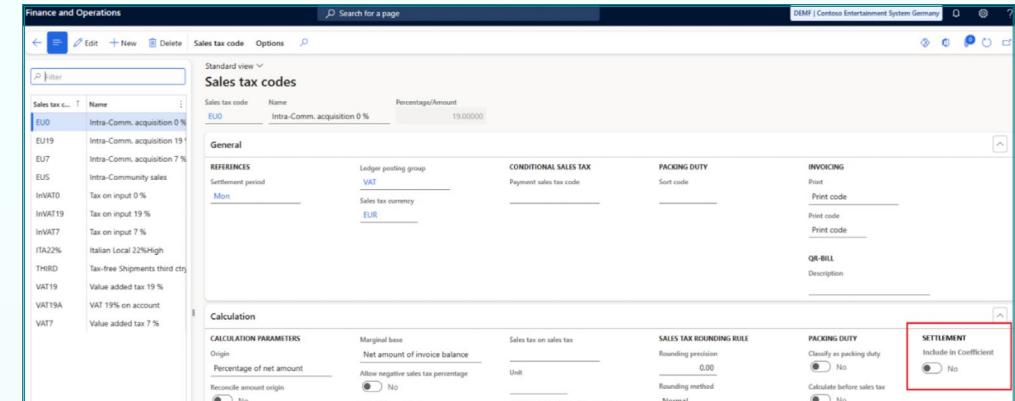


The screenshot shows the 'Address details' page for a pending vendor invoice. The 'DEPARTURE ADDRESS' section, which includes the 'Departure address' field set to 'Opal Audio', is highlighted with a green box.

3.2.2. VAT Coefficient sales tax recoverable calculation

3.2.2.1. Sales tax code form

Path: Tax -> Sales Tax Codes -> Calculation:



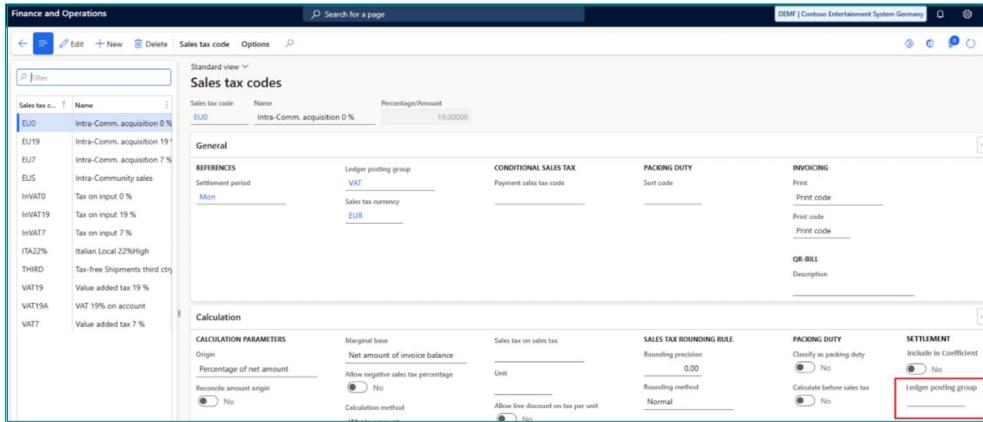
The screenshot shows the 'Sales tax codes' page. The 'Settlement' section, which includes the 'Settlement' field set to 'Include in Coefficient', is highlighted with a red box.

When enabled this sales tax code will be used for Sales Tax Coefficient recoverable calculation according to the logic as described in section 3.2.2.5. If switched off, the logic is disabled.

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3.2.2.2. Sales tax code posting group

Path: Tax -> Sales Tax Codes -> Calculation:

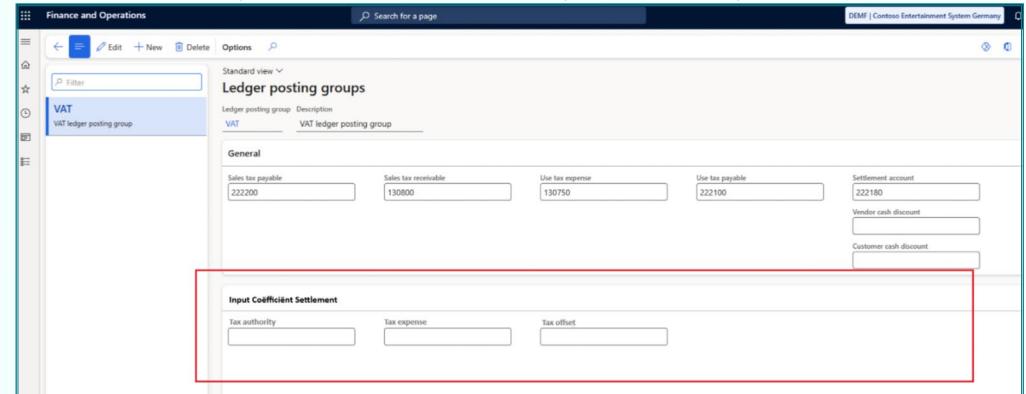


The screenshot shows the 'Sales tax codes' page in 'Calculation' mode. The 'LJ-BILL' section, which contains fields for 'Description' and 'LJ-BILL', is highlighted with a red box. Other visible sections include 'General' (with 'Settlement period' set to 'Mon'), 'REFERENCES' (with 'LJ-BILL' selected), 'CONDITIONAL SALES TAX' (with 'Payment sales tax code' and 'Sales tax currency' fields), 'PACKING DUTY' (with 'Sort code' and 'Print' buttons), and 'INVOICING' (with 'Print' and 'Print code' buttons).

This field is only enabled when the "Include in Coefficient" Parameter is switched on, otherwise this field is greyed out. It then uses the values from the Ledger posting group table/form (see 3.2.2.3. image), and is used to define the posting group when settling sales tax payment.

3.2.2.3. Ledger posting group

Path: Tax -> Setup -> Sales tax -> Ledger posting groups:



The screenshot shows the 'Ledger posting groups' page. The 'VAT' ledger posting group is selected. The 'General' section shows 'Sales tax payable' (222200), 'Sales tax receivable' (130800), 'Use tax expense' (130750), 'Use tax payable' (222100), 'Settlement account' (222180), 'Vendor cash discount' (empty), and 'Customer cash discount' (empty). The 'Input Coefficient Settlement' section, which contains fields for 'Tax authority', 'Tax expense', and 'Tax offset', is highlighted with a red box.

This section defines the additional logic to follow when a vendor transaction is settled during the "Settle Open Transactions" process.

Fields:

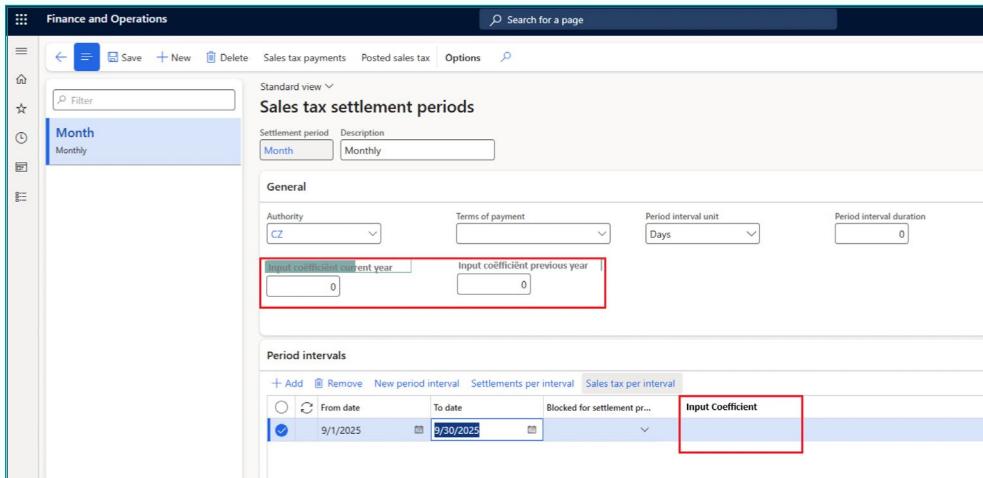
Tax authority, Tax expense and Tax offset:

Data type: ID field of Main Accounts Table, retrieved from the Main Accounts Table/Form

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3.2.2.4. Settlement periods

Path: Tax -> Sales Tax Settlement Periods -> General:



The screenshot shows the 'Sales tax settlement periods' page in the 'General' view. It includes fields for 'Authority' (CZ), 'Terms of payment', 'Period interval unit' (Days), and 'Period interval duration' (0). The 'Input coefficient current year' and 'Input coefficient previous year' fields are highlighted with red boxes. In the 'Period intervals' section, the 'Input Coefficient' field is also highlighted with a red box. The 'From date' and 'To date' fields show '9/1/2025' and '9/30/2023' respectively.

General Section; Input coefficient current year

This number defines the calculation percentage at the time of tax settlement.

Period intervals section; Input Coefficient

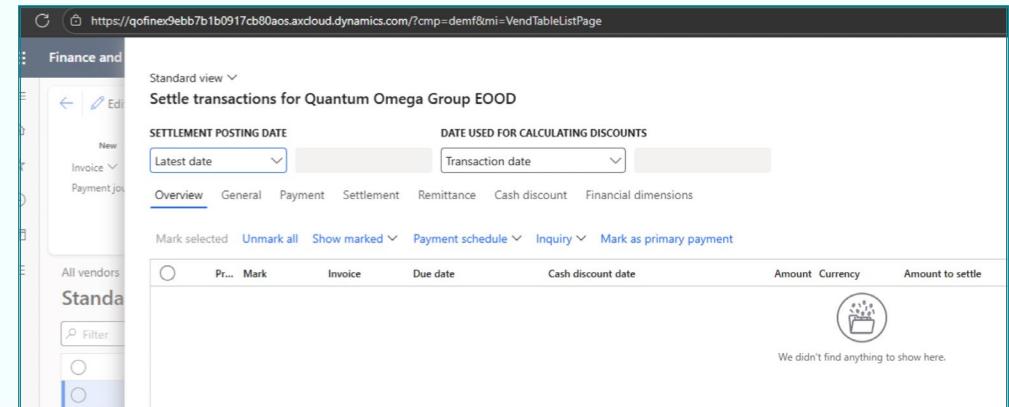
The value of this field is automatically retrieved from the coefficient value used for this period, and the value is not editable.

3.2.2.5. VAT Coefficient calculation logic

When using the Settle Open Transactions function the logic performs as follows:

Example:

Path: Accounts payable -> Vendors -> Invoice -> Settle -> Settle transactions:



The screenshot shows the 'Settle transactions for Quantum Omega Group EOOD' page. It includes fields for 'Settlement posting date' (Latest date) and 'Date used for calculating discounts' (Transaction date). The 'Input Coefficient' field in the 'Period intervals' section is highlighted with a red box. The 'From date' and 'To date' fields show '9/1/2025' and '9/30/2023' respectively. A message at the bottom right says 'We didn't find anything to show here.'

The ASX logic will create additional lines to correct the sales tax amount calculated and post them to the fields:

- Debit: Ledger account derived from the field "Tax authority"
- Debit: Ledger account derived from the field "Tax expense"
- Credit: Ledger account derived from the fields "Tax offset"

Example (when the original calculated sales tax was 210):

- Debet: Tax authority	164
- Debet: Tax expense (cost)	46
- Credit: Tax offset	210

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Important note:

This logic also works from the vendor invoice payment form when invoices are selected to settle.

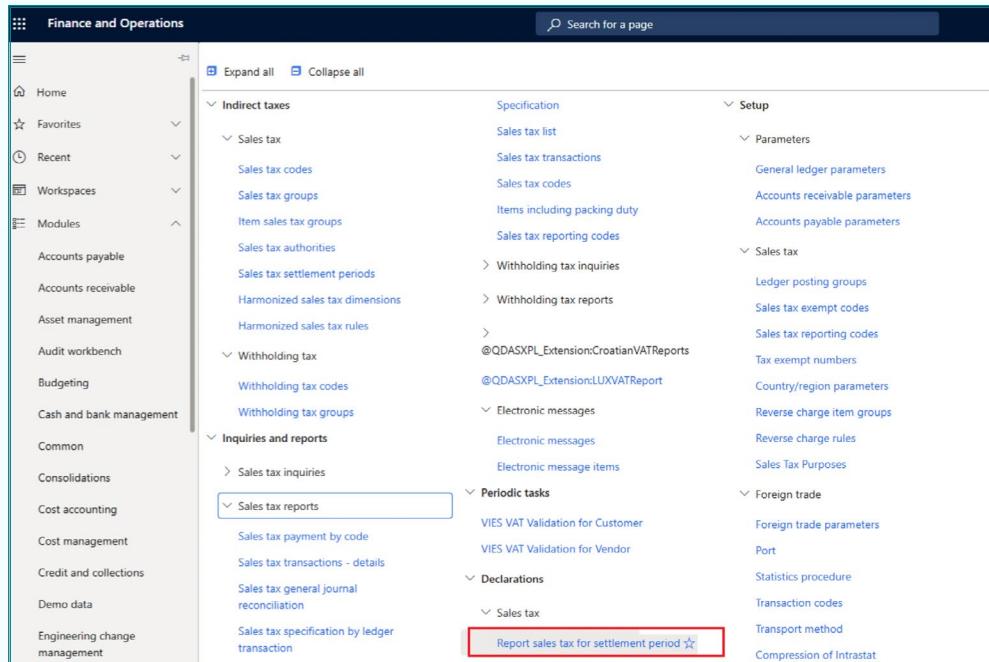
3.2.2.6. Reporting logic

The standard sales tax report retrieves the values from the calculated totals and passes them through to the report.

However, when the parameter of section "Enable coefficient calculation" is switched on, then the value of the field "Tax Authority" is passed through the calculation logic of the tax report.

This report is called upon using the following **path**:

Tax -> Declarations -> Sales tax -> Report sales tax for settlement period:

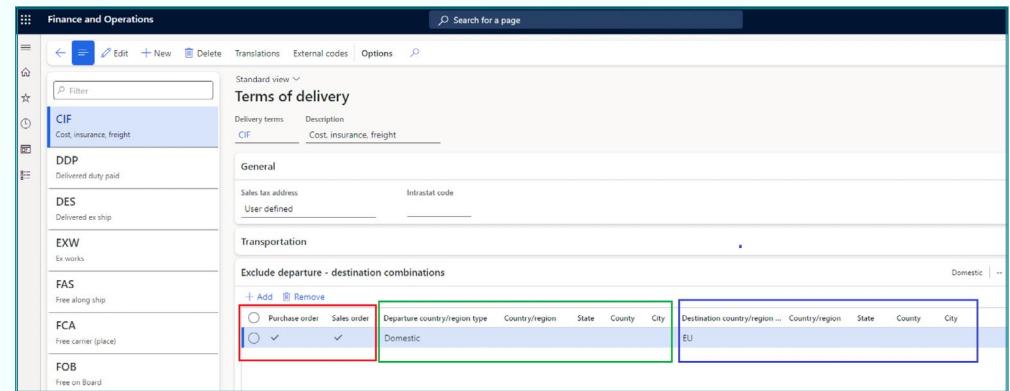


The screenshot shows the Dynamics 365 ribbon with the following path selected:

- Home
- Indirect taxes
- Sales tax
- Sales tax reports
- Report sales tax for settlement period

3.2.3. Delivery terms form

The delivery terms form defines the allowed delivery terms for the departure- and destination address combination. (**path**: Accounts payable -> Setup -> Terms of delivery):



The screenshot shows the 'Terms of delivery' form in Dynamics 365. The 'Exclude departure - destination combinations' table is highlighted with a red border. A row for 'Purchase order' is marked with a red box, and a row for 'Sales order' is marked with a green box.

Exclude departure - destination combination tab:

The data in the related table defines which departure- and destination address combination are not allowed when the term of delivery is input on the Sales order or Purchase order transaction line.

Logic in column values:

- Purchase order:** If marked this departure- and destination combination is excluded for Purchase orders.
- Sales order:** If marked this departure- and destination combination is excluded for Sales orders.
- Address columns left (green):** these fields define the departure address fields.

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o **Address columns right (blue):** these fields define the destination address fields.

» **Logic in column values:**

the values in the columns for departure- and destination address combinations, which is found in the fields (if not blank): Country region type, Country region, State, County, City, are applied under the following rules:

- If the field has a value, the value is considered, and this departure-destination address is not allowed for the associated transaction line.
- If the field is blank, all values for this field are allowed.

3.2.3.1. Delivery terms form logic

ASX verifies if the input delivery term is valid automatically and dynamically, if the Enable auto sales tax group is switched on.

This logic is applied for:

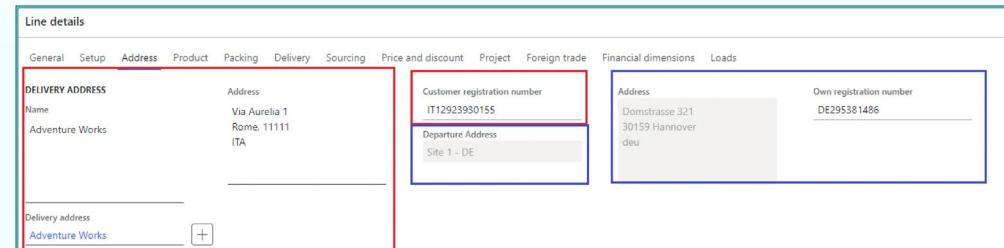
- Sales orders
- Purchase orders

The logic is applied every time, a delivery term is input and/or changed and/or the departure address and/or destination address is entered or changed and works as follows: the delivery term on the transaction line is compared against the not allowed (exclude) departure- destination address combination, on the Exclude departure- destination combination for the input delivery term.

See below example of a sales order line where the departure address is from the site/warehouse in Germany (Blue) and the destination address is of the customer in Italy (Red). When ASX logic searches for this departure- and destination address combination, it finds that the delivery term input by the user (CIF) is not allowed for the departure- and destination address combination. The action that ASX performs then depends on the settings of the **Error level delivery term**. As CIF is not an allowed delivery term for the current departure- and address combination, ASX will throw an error. The applied logic is as follows:

- » Sales tax direction: Sales
- » Destination country/region type: EU
- » Departure country/country region type: Domestic (the entity DEMF is in Germany)
- » Error level delivery terms: Error

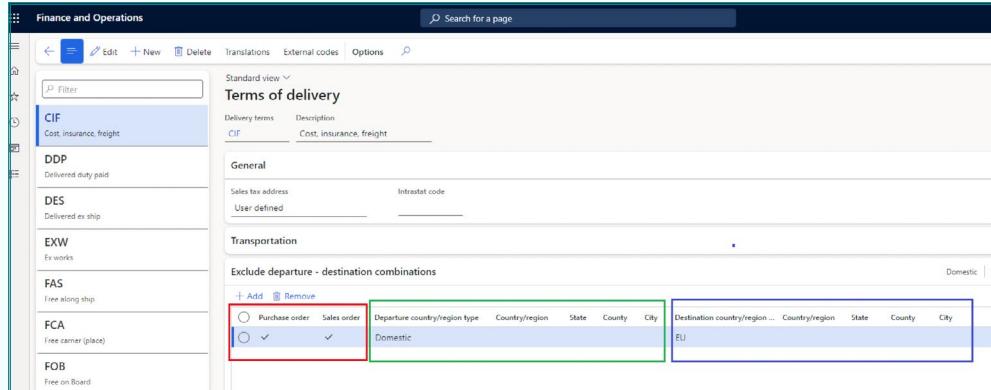
Sales order line, address tab:



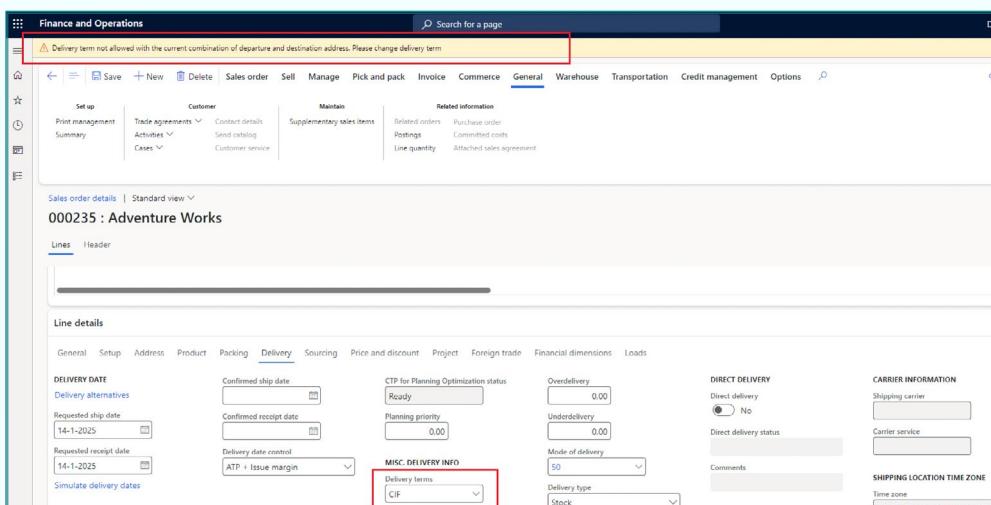
The screenshot shows the 'Line details' tab of a sales order line. The 'Address' field for the departure (Site 1 - DE) is highlighted in blue, and the 'Customer registration number' field for the destination (Site 1 - DE) is highlighted in red. Other fields like 'Name' and 'Address' for the departure are also highlighted in blue.

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Delivery terms form:



Sales order line, delivery tab:

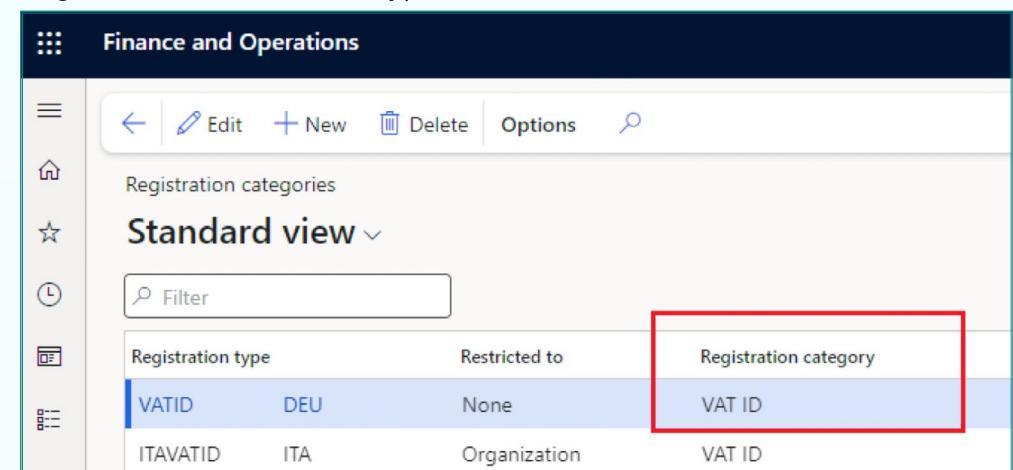


3.2.4. Sales tax ID registration forms

The sales tax ID registration on the Purchase Order, Sales Order, Free Text Invoice, and Project Invoice Proposal is retrieved from the associated Sales tax ID registration forms, which are applied to the following type of addresses:

- Customer
- Vendor
- Entity
- Site

Note: for all these forms, the pre-requisite for ASX, to correctly fetch the associated Sales Tax ID number, is that the Registration category of the Registration ID, must be of type VAT ID or EU VAT ID:



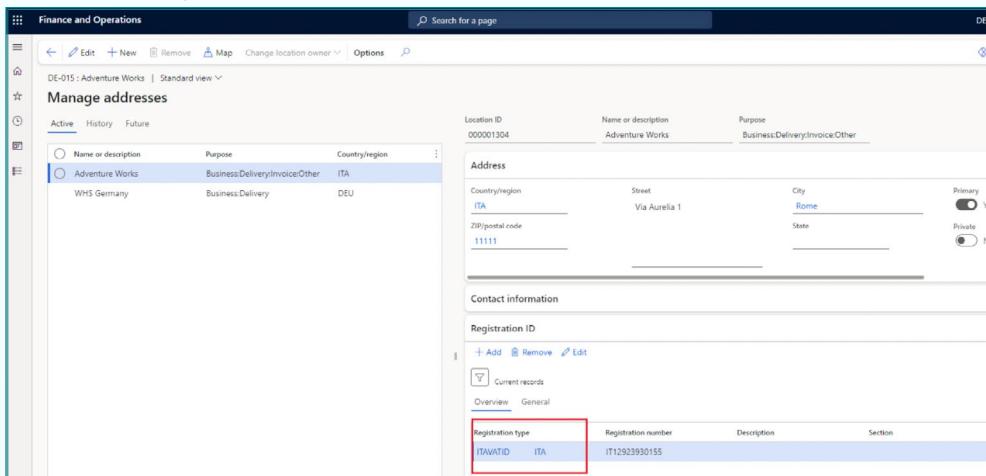
Registration type	Restricted to	Registration category
VATID	DEU	None
ITAVATID	ITA	Organization
		VAT ID

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3.2.4.1. Customer sales tax ID registration form

The Customer Sales tax ID is stored here: *Accounts receivable -> Customers -> All customers -> (Select customer) -> Addresses (tab) -> More options -> Advanced*.

Note: for this form, the pre-requisite for ASX, to correctly pick up the Sales Tax ID number, is that the Registration category of the Registration ID, must be of type VAT ID:



The screenshot shows the 'Manage addresses' page in Microsoft Dynamics 365. The 'Address' section is displayed, with a registration ID of '000001304' and a purpose of 'Business:Delivery/Invoice/Other'. The 'Address' section shows 'Adventure Works' as the name, 'Business:Delivery' as the purpose, and 'ITA' as the country/region. The 'Contact information' section shows 'Via Aurelia 1' as the street and 'Rome' as the city. The 'Registration type' section at the bottom is highlighted with a red box, showing 'ITAVATID' and 'ITA' as the registration type and category respectively. The 'Registration number' is 'IT12923930155'.

3.2.4.2. Vendor sales tax ID registration form

The Vendor Sales tax ID is stored here: *Accounts payable -> Vendors -> All vendors -> (Select vendor) -> Addresses (tab) -> More options -> Advanced*.

The rules for the Vendor Tax Registration ID, are identical to that of the Customer Tax Registration ID.

3.2.4.3. Entity sales tax ID registration form

The Entity Sales tax ID is stored here: *Organization administration -> Legal entities -> (Select entity) -> Addresses (tab) -> More options -> Advanced*.

The rules for the Vendor Tax Registration ID, are identical to that of the Customer Tax Registration ID.

3.2.4.4. Site sales tax ID registration form

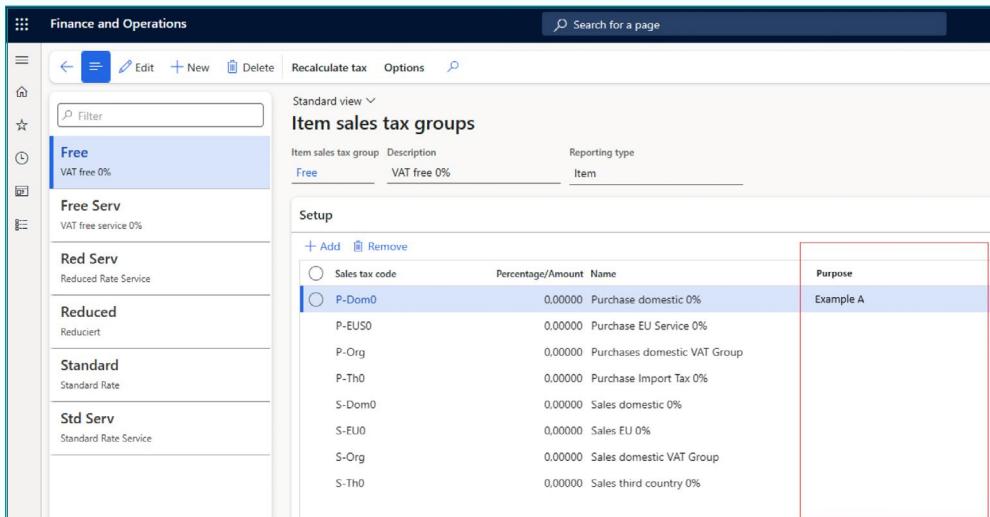
The Site Sales tax ID is stored here: *Inventory management -> Setup -> Inventory breakdown -> Sites -> (Select site) -> Addresses (tab) -> More options -> Advanced*.

The rules for the Vendor Tax Registration ID, are identical to that of the Customer Tax Registration ID.

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3.2.5. Item Sales Tax Groups Form (Purpose Field)

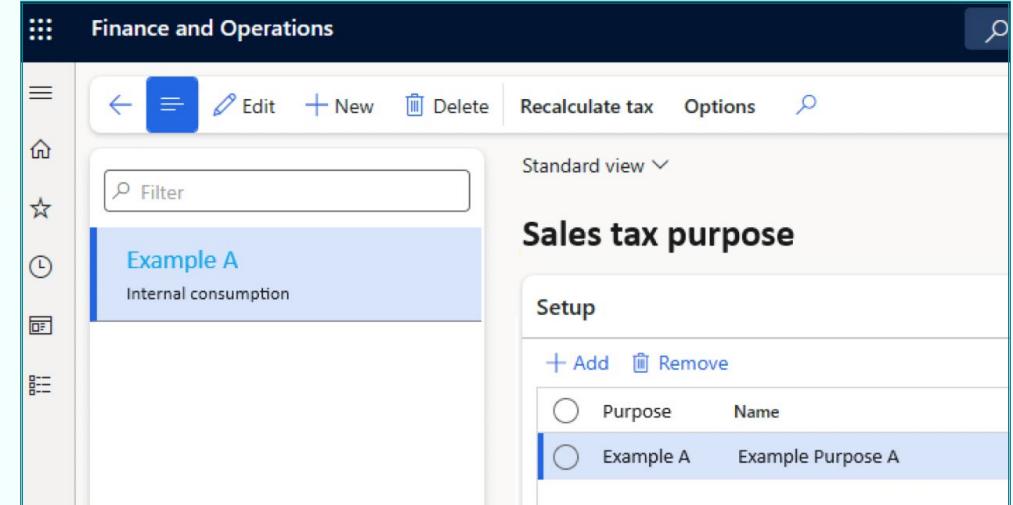
Path: Tax -> Indirect taxes -> Sales tax -> Item Sales tax groups:



Sales tax code	Percentage/Amount	Name	Purpose
P-Dom0	0.00000	Purchase domestic 0%	Example A
P-EU00	0.00000	Purchase EU Service 0%	
P-Org	0.00000	Purchases domestic VAT Group	
P-Th00	0.00000	Purchase Import Tax 0%	
S-Dom0	0.00000	Sales domestic 0%	
S-EU00	0.00000	Sales EU 0%	
S-Org	0.00000	Sales domestic VAT Group	
S-Th00	0.00000	Sales third country 0%	

The purpose field "looks-up" and retrieves the data from the "Sales Tax Purposes" table.

Path: Tax -> Setup -> Sales tax -> Sales tax purposes:



Purpose	Name
Example A	Internal consumption

3.2.5.1. Sales tax code update logic based on Purpose

ASX updates the Sales tax code automatically and dynamically based on the purpose of the transaction.

This logic is applied for:

- Purchase orders.
- Purchase return orders.
- Pending Vendor Invoices.
- Vendor Invoice Journals.

The logic is applied every time, the [Sales tax purpose] field is entered or changed and works as follows: the purpose field is standard blank, but

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when entered by the user, from a list of available purposes, ONLY the sales tax code with the associated purpose is passed through to the standard sales tax framework calculation logic.

See below example for a Purchase Order, where the Item Sales Tax Group applied is "Standard", and the Sales tax group direction is "P-Dom-Dom".

This applies that the following two Sales tax codes are selected:

- P-DomHigh
- P-DomHInt

Sales tax code	Percentage/Amount	Name	Purpose
P-DomHigh	19.00000	Purchase domestic 19%	
P-DomHInt	19.00000	Purchase domestic Internal Consumption	Int Consumption
P-EUHigh	19.00000	Purchase EU 19%	
P-Org	0.00000	Purchases domestic VAT Group	
P-ThHigh	19.00000	Purchase Import Tax 19%	
S-DomHigh	19.00000	Sales domestic 19%	
S-EUHigh	19.00000	Sales EU 19%	
S-EUTriHigh	19.00000	Sales Triangulatio Simplif.19%	
S-OoS19	19.00000	Sales out of Scope 19%	
S-Org	0.00000	Sales domestic VAT Group	
S-ThHigh	19.00000	Sales third country 19%	

The logic works as follows:

If no value is selected in the purpose field (see below picture), or the field is blank, then the Sales tax code with the "blank" purpose field is passed

through. If the purpose field is entered with a value, then the Sales tax code with that value is passed through.

Purchase order line tab:

Line details		SALES TAX		POSTING										
General	Setup	Address	Product	Delivery	Picking	Price and discount	Project	Product packages	Variants	Foreign trade	Fixed assets	Financial dimensions	Loads	INVENTORY
INVENTORY		RETURNED ORDER		SALES TAX		POSTING		INVENTORY						
Lot ID 002918		Return action		Item sales tax group Standard		Ledger account		Inventory quantity 4.00						
				Scrap <input checked="" type="checkbox"/> Yes										
				Sales tax group P-TH-EU										
				Sales tax purpose Int Consumption										
						DATE AND TIME								
						Created date and time 31-3-2024 10:37:27								

Pending vendor invoice Line details tab:

Line details		SALES TAX		PURCHASE ORDER		DELIVERY ADDRESS			
Line details	Setup	Product	Price and discount	Project	Foreign trade	Fixed assets	Financial dimensions	Address	Delivery date
SALES TAX		PURCHASE ORDER		DELIVERY ADDRESS					
Item sales tax group Standard		Line number 1		Name Contoso Warehouse ITA					
Sales tax group P-TH-EU		Reasons		Postal address Contoso Warehouse ITA					
Sales tax purpose Int Consumption		Reason comment							

Important note:

The "Purpose" field allows for selecting a sales tax code that defines the applicability of the sales tax from a reporting point of view, as well as the deductibility of it.

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Vendor invoice journal, general tab:

Important note:

Retrieves the Sales Tax code after the selection of Sales Tax Group and Item Sales Tax group.

In the invoice journal, the function will also fill in the Sales tax code when it is calculated by the purpose function. Note that the user can always overwrite the sales tax code field value that has been input by the purpose function based on the parameter in the "Journal names" form (see the image).

Journal names:

Important note:

In the Journal Names form this selection enables or disables manual input based on the selection of the parameter.

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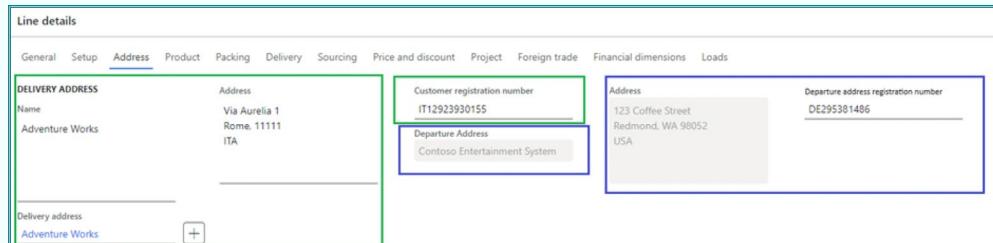
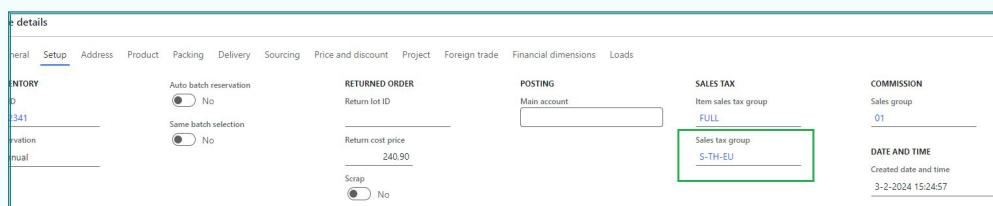
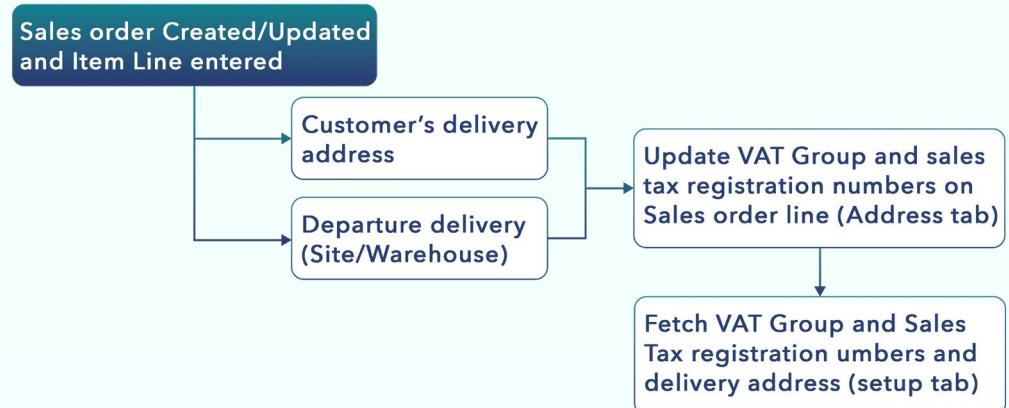
4. Main Process Flows

4.1. Sales Order

The user creates a new sales order and enters the item(s), the departure address (Site and Warehouse, marked blue in below picture) and delivery address of the customer on the transaction line (marked green).

ASX then automatically fetches and updates the associated Sales Tax Group on the sales order line - Setup tab (marked green), based on the departure address and delivery address.

Additionally, the related Tax Registration numbers of the departure and delivery addresses are retrieved and shown on the sales order line:

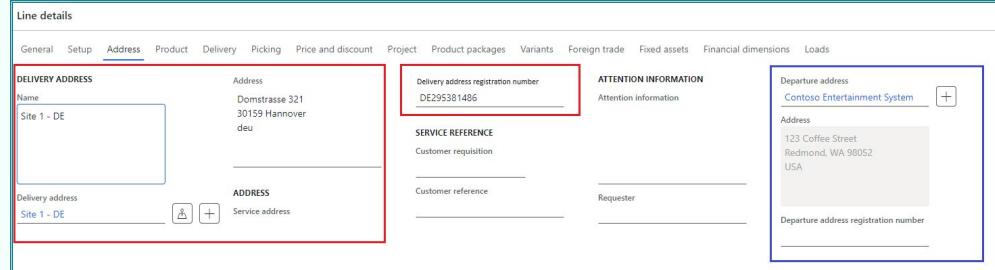
4.2. Purchase Order

The user creates a new purchase order and enters the item(s), and delivery address on the transaction line (red). Once the user has received a shipment confirmation from the vendor with the departure address, the user updates the purchase order with the departure address (blue).

ASX then automatically fetches and updates the associated Sales Tax Group (green) on the purchase order line, based on the departure address and delivery address.

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Additionally, the related Tax Registration numbers of the departure and delivery addresses are retrieved and shown on the purchase order line:



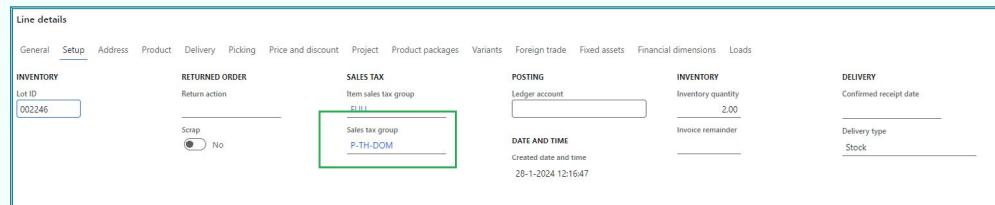
Line details

General Setup Address Product Delivery Picking Price and discount Project Product packages Variants Foreign trade Fixed assets Financial dimensions Loads

DELIVERY ADDRESS
Name: Site 1 - DE
Address: Domstrasse 321 30159 Hannover deu

ATTENTION INFORMATION
Delivery address registration number: DE295381486

Departure address
Contoso Entertainment System
Address: 123 Coffee Street Redmond, WA 98052 USA



Line details

General Setup Address Product Delivery Picking Price and discount Project Product packages Variants Foreign trade Fixed assets Financial dimensions Loads

INVENTORY
Lot ID: 002246

RETURNED ORDER
Return action: Scrap (radio button No)

SALES TAX
Item sales tax group: P-TH-DOM

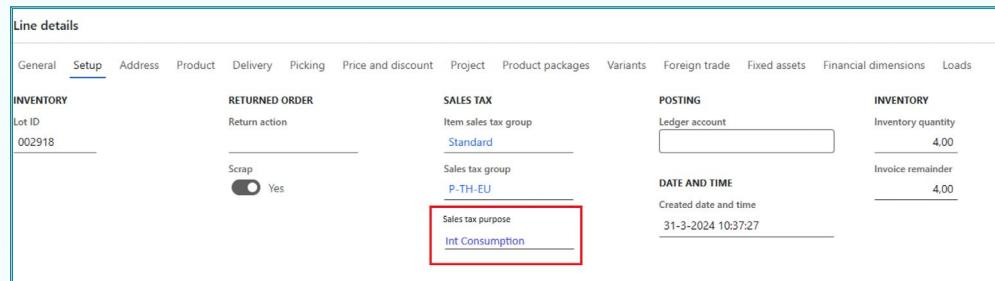
POSTING
Ledger account: GL11

INVENTORY
Inventory quantity: 2.00

DELIVERY
Confirmed receipt date: 28-1-2024 12:16:47

DATE AND TIME
Created date and time: 28-1-2024 12:16:47

Additionally, the user may update the "Sales tax purpose" field:



Line details

General Setup Address Product Delivery Picking Price and discount Project Product packages Variants Foreign trade Fixed assets Financial dimensions Loads

INVENTORY
Lot ID: 002918

RETURNED ORDER
Return action: Scrap (radio button Yes)

SALES TAX
Item sales tax group: Standard
Sales tax group: P-TH-EU

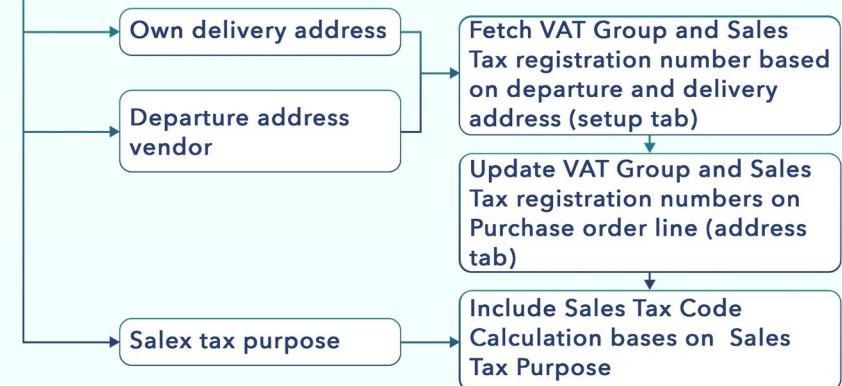
POSTING
Ledger account: GL11

INVENTORY
Inventory quantity: 4.00

DATE AND TIME
Created date and time: 31-3-2024 10:37:27

Sales tax purpose
Int Consumption

Purchase order Created/Updated and Item Line entered



4.3. Vendor Invoices

The Vendor Invoices Forms (Pending Vendor Invoices and Vendor Invoice journal) follow the same logic as the Purchase Order Form.

4.4. Vendor Invoice Settlement

When the "Enable Coefficient Calculation" parameter is switched on (see section 3.1.10., Settlement), the recoverable sales tax is calculated and reported according to the logic mentioned in section 3.2.2. VAT Coefficient recoverable sales tax calculation.

4.5. Direct (Intercompany) delivery

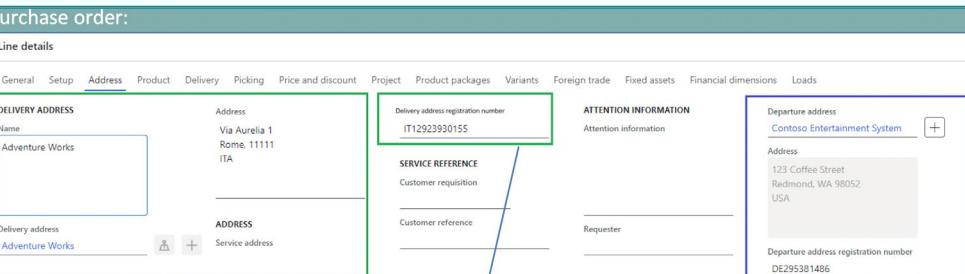
A direct delivery transaction is a combination of a Purchase Order and Sales Order. In ASX the departure address fields on the Sales Order (new ASX fields) are inherited from the departure address fields on the Purcha-

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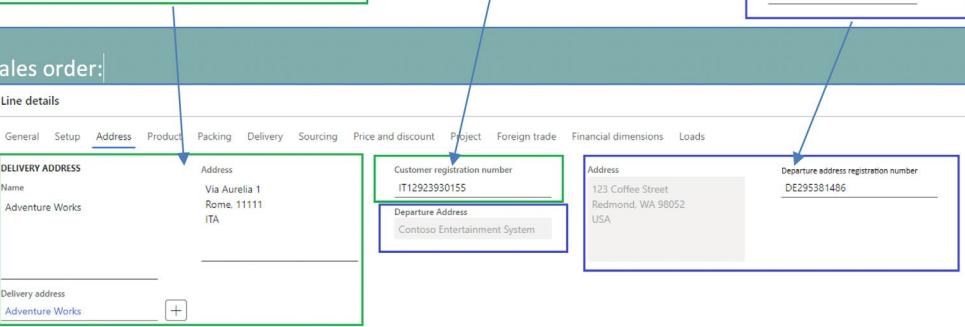
se Order. The same applies to the Sales Tax Registration number of the departure address.

The Sales Tax Group calculation function remains the same for each sales order type (Sales and Purchase):

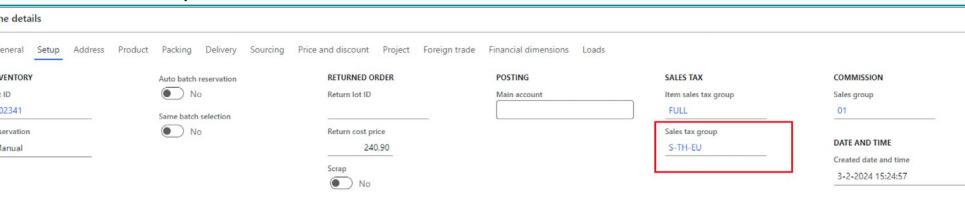
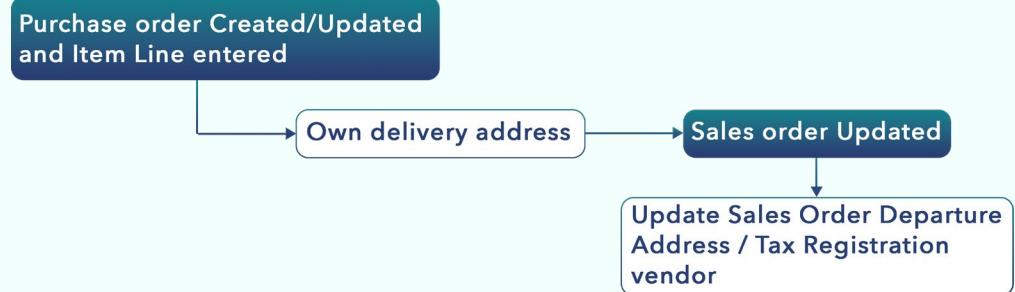
Purchase order:



Sales order:



Sales Tax Group Purchase Order and Sales Order:

4.6. Customer Free Text Invoice

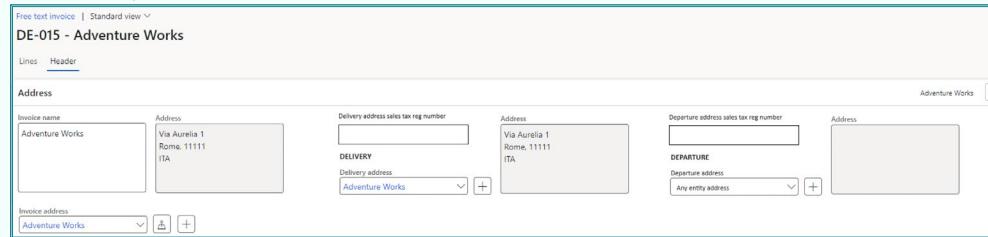
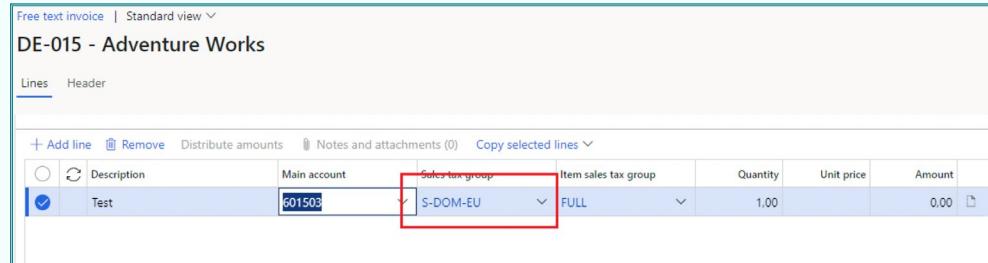
A free text invoice is not associated with a warehouse. Therefore, ASX calculates and updates the Sales Tax Group (Red) based on the address of the entity and the delivery address of the customer on the Header. Therefore, the address tab on the header has the fields as shown in the picture below.

Note:

- » The delivery address of the customer is automatically defaulted to the primary address of the customer on the header tab but can be updated by the user. If updated the new address will trigger the Sales Tax Group calculation function to update the Sales Tax Group on the line.
- » The departure address and departure address sales tax registration number are automatically defaulted from the primary address of the entity but can be updated by the user. If updated the new address will trigger the Sales Tax Group calculation function to update the Sales Tax Group on the line.

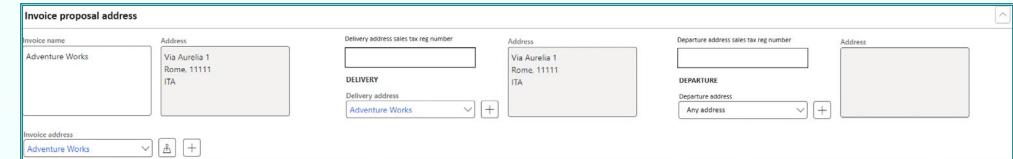
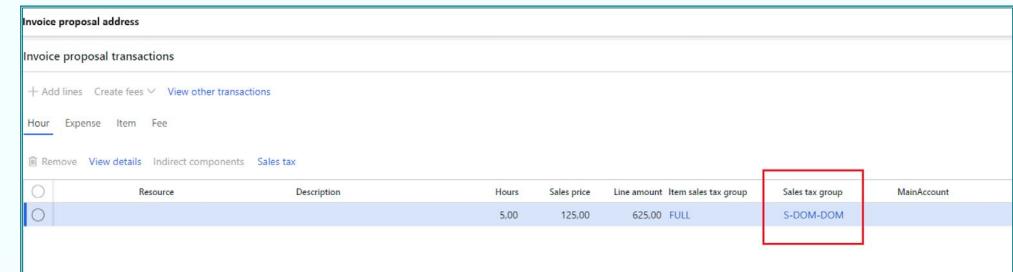
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Please note that the departure address is retrieved from the entity address table, not the site or warehouse. The departure address sales tax reg number is retrieved from the same address. If no sales tax registration number exists for this address, then the sales tax registration number is retrieved from the primary address:

4.7. Project Invoice

A project invoice is created from the Project Invoice proposal and is not associated with a warehouse. Therefore, ASX calculates and updates the Sales Tax Group (Red) based on the address of the entity and the delivery address of the customer:

Note:

- » The delivery address of the customer is automatically defaulted to the primary address of the customer on the header tab but can be updated by the user. If updated the new address will trigger the Sales Tax Group calculation function to update the Sales Tax Group on the line.
- » The departure address and departure address sales tax registration number are automatically defaulted from the primary address of the entity but can be updated by the user. If updated the new address will trigger the Sales Tax Group calculation function to update the Sales Tax Group on the line.

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Please note that the departure address is retrieved from the entity address table, not the site or warehouse. The departure address sales tax reg number is retrieved from the same address. If no sales tax registration number exists for this address, then the sales tax registration number is retrieved from the primary address.

4.8. Sales Return Order

When a return order is created, there are two options:

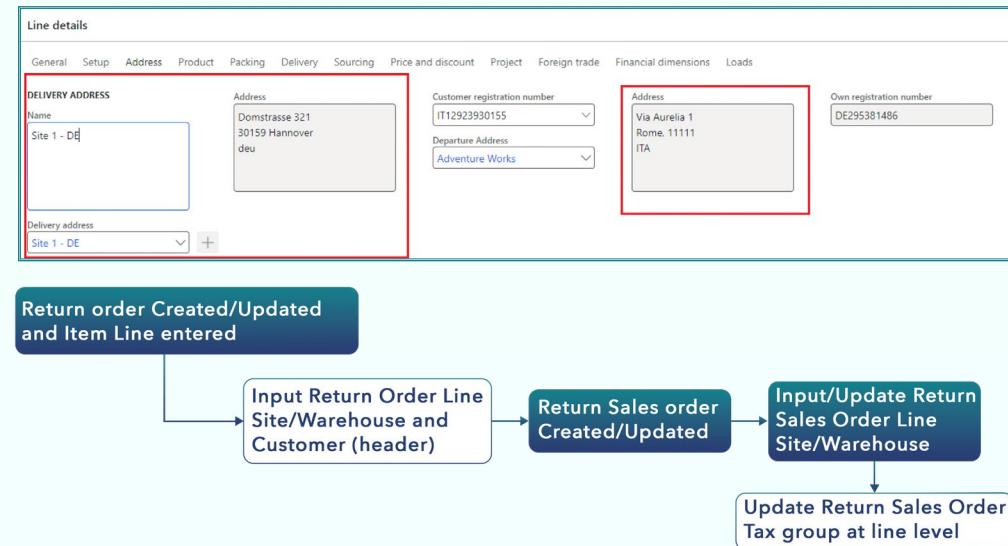
1. The return order is created by selecting the items of the original sales order.
2. The return order is created without an original sales order as a basis.

The action that follows depends on the parameter setting of

Retrieve sales tax group from original sales order

If this parameter is switched on, then the following action happens:

- 1) The return order is created by selecting the items of the original sales order -> The sales tax group is retrieved by calculating the sales tax group on the original departure- and destination address.
- 2) The return order is created without an original sales order as a basis -> The sales tax group is retrieved from the sales order created from the return order first, then reversing the departure- and destination address (thus departure = destination, and destination = departure), next fetching the sales tax group on the reversed combination.



4.9. Purchase Return Order

When goods are returned to the vendor there are two possible scenarios:

- 1) The purchase order return is created by selecting the item(s) of the original purchase order.
- 2) The pending vendor invoice is created without an original purchase order as a basis.

The action that follows depends on the parameter setting of

Retrieve sales tax group from original purchase order

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If this parameter is **switched on**, then the following action happens:

3) The return order is created by selecting the items of the original purchase order --->

The sales tax group is retrieved by calculating the purchase tax group on the original departure- and destination address.

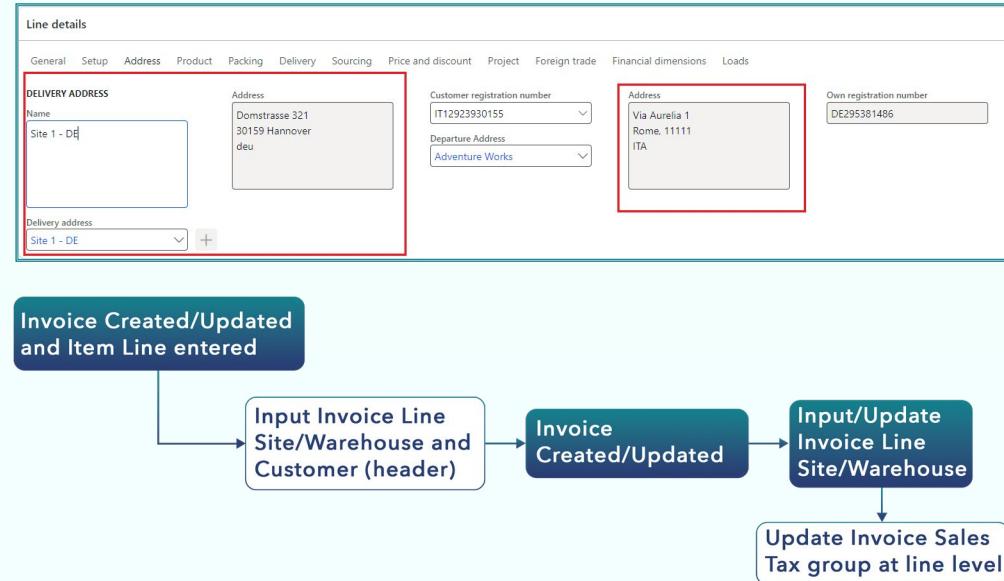
4) The pending vendor invoice is created without an original purchase order as a basis --->

The sales tax group is retrieved from the pending vendor invoice and then reversing the departure- and destination address (thus departure = destination, and destination = departure), then fetching the sales tax group on the reversed combination.

If this parameter is **switched off**, then the following action happens:

3) The return order is created by selecting the items of the original purchase order ---> The sales tax group is retrieved from the purchase order created from the return order first and reversing the departure- and destination address (thus departure = destination, and destination = departure), then fetching the sales tax group on the reversed combination.

4) The pending vendor invoice is created without an original purchase order as a basis ---> The sales tax group is retrieved from the pending vendor invoice, and then reversing the departure- and destination address (thus departure = destination, and destination = departure), then fetching the sales tax group on the reversed combination:



4.10. Reports

4.10.1. VAT Submission report

For European countries, in the Electronic messages reports (if applicable for the associated country), the following reports, make use of the logic, as previously described:

- VAT Control Statement (only available for certain countries)
- VAT Declaration XML
- VAT Declaration Excel

The ASX logic has also been fully integrated into the standard Sales Tax / VAT submission report, ensuring that all your Sales Tax Submission Reports remain compliant across every applicable Sales Tax / VAT reporting format.

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You can access the standard Sales Tax / VAT report via the following
path: Tax -> Declarations -> Sales tax-> Report sales tax for settlement period.

4.10.2. Project Invoice Proposal

Path: Project Management and Accounting -> Projects -> All projects.

To run the Project Invoice Proposal, in the "All projects" form, after you selected a project:

Path: New -> Invoice proposal.

This report applies the same ASX calculation and reporting logic as the standard Sales Tax Report for determining sales tax.

4.10.3. EU Foreign Trade Reports

4.10.3.1. Instrastat:

The Instrastat report can be created per TAX registration ID and shows the VAT registration ID numbers related to the associated addresses.

4.10.3.2. EU Sales List

The EU Sales list report can be created per TAX registration ID and shows the VAT registration ID numbers related to the associated addresses.

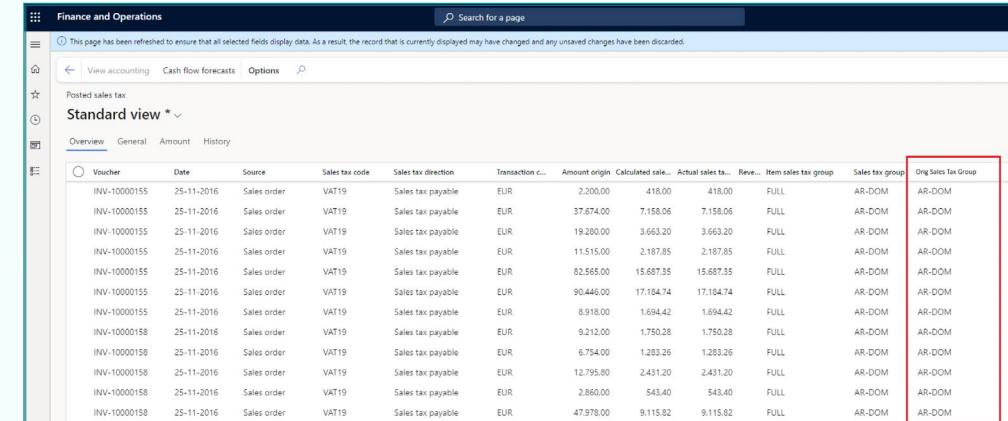
4.11. Complementary Functions

4.11.1. Audit Trail

Sales tax is automatically calculated and posted when the ASX function is enabled ([Enable auto sales tax group](#)).

Depending on the setting of [Sales tax security level / User Group](#), users are allowed to make changes. These changes are tracked and the last

change versus the original calculated sales tax group can be viewed using the Posted sales tax view:



Voucher	Date	Source	Sales tax code	Sales tax direction	Transaction amount	Amount origin	Calculated rate	Actual sales tax amount	Revenue	Item sales tax group	Sales tax group	Orig Sales Tax Group
INV-10000155	25-11-2016	Sales order	VAT19	Sales tax payable	EUR 2,200.00	418.00	418.00	FULL	AR-DOM	AR-DOM	AR-DOM	
INV-10000155	25-11-2016	Sales order	VAT19	Sales tax payable	EUR 37,674.00	7,158.06	7,158.06	FULL	AR-DOM	AR-DOM	AR-DOM	
INV-10000155	25-11-2016	Sales order	VAT19	Sales tax payable	EUR 19,200.00	3,663.20	3,663.20	FULL	AR-DOM	AR-DOM	AR-DOM	
INV-10000155	25-11-2016	Sales order	VAT19	Sales tax payable	EUR 11,515.00	2,187.85	2,187.85	FULL	AR-DOM	AR-DOM	AR-DOM	
INV-10000155	25-11-2016	Sales order	VAT19	Sales tax payable	EUR 82,565.00	15,687.35	15,687.35	FULL	AR-DOM	AR-DOM	AR-DOM	
INV-10000155	25-11-2016	Sales order	VAT19	Sales tax payable	EUR 90,446.00	17,184.74	17,184.74	FULL	AR-DOM	AR-DOM	AR-DOM	
INV-10000155	25-11-2016	Sales order	VAT19	Sales tax payable	EUR 8,918.00	1,694.42	1,694.42	FULL	AR-DOM	AR-DOM	AR-DOM	
INV-10000158	25-11-2016	Sales order	VAT19	Sales tax payable	EUR 9,212.00	1,750.28	1,750.28	FULL	AR-DOM	AR-DOM	AR-DOM	
INV-10000158	25-11-2016	Sales order	VAT19	Sales tax payable	EUR 6,754.00	1,283.26	1,283.26	FULL	AR-DOM	AR-DOM	AR-DOM	
INV-10000158	25-11-2016	Sales order	VAT19	Sales tax payable	EUR 12,795.80	2,431.20	2,431.20	FULL	AR-DOM	AR-DOM	AR-DOM	
INV-10000158	25-11-2016	Sales order	VAT19	Sales tax payable	EUR 2,860.00	543.40	543.40	FULL	AR-DOM	AR-DOM	AR-DOM	
INV-10000158	25-11-2016	Sales order	VAT19	Sales tax payable	EUR 47,978.00	9,115.82	9,115.82	FULL	AR-DOM	AR-DOM	AR-DOM	

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Click the image below and see the framework in action.

Advanced Sales Tax Framework (ASX)

Global Tax Compliance — Built for Finance Leaders

Tax compliance is no longer just a back office task — it's a strategic risk area. The Advanced Sales Tax Framework (ASX) enhances the standard Microsoft Dynamics 365 Finance sales tax functionality, giving CFOs and finance teams confidence, control, and compliance across every jurisdiction they operate in.

Why CFOs Choose ASX

Compliance Without Complexity

Stay compliant with ever-changing tax laws worldwide — without constant manual updates or risk of penalties.

Cross-Border Confidence

Seamlessly handle international and multi-jurisdictional transactions, including origin-and destination-based taxation.

Real-Time Accuracy

Calculate tax for project transactions globally with instant, reliable results — keeping your financials correct and audit-ready.

Risk & Audit Readiness

Automate calculations, minimize human error, and maintain complete audit trails for faster, smoother audits.

Strategic Controls

Manage Sales Tax Coefficient thresholds, variable rates, exemptions, and purpose-based rules to ensure accurate recoverability and compliance reporting.

ASX Turns Tax Compliance into a Strategic Advantage

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Your Premier Microsoft Partner to:



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Gain end-to-end visibility of processes by connecting all manufacturing steps from start to finish.