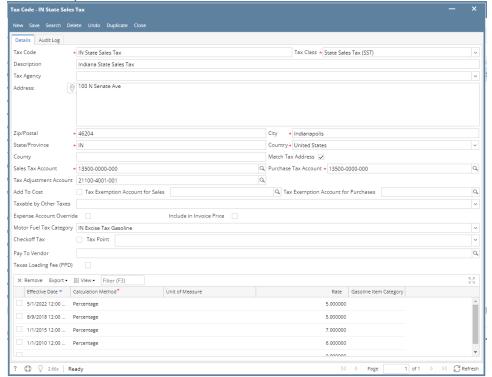# How to Add a Tax Code

1. On the user's menu panel go to **Common Info** folder then click **Tax Codes**
   a. If there are existing records, **Search Tax Codes** screen will open
   b. If there is no existing record, the new **Tax Codes** screen will open
2. From **Search Tax Codes** screen click **New** toolbar button
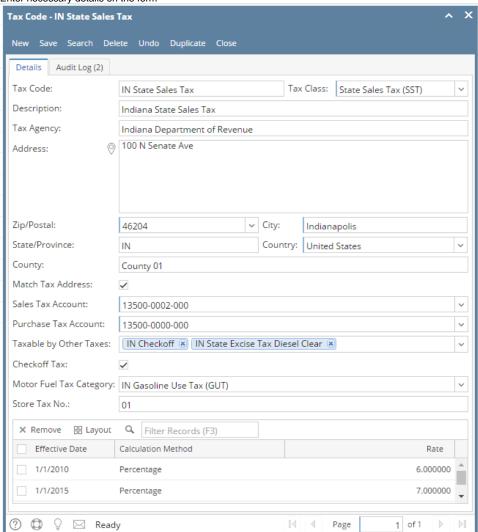3. Enter necessary details on the form

4. Click **Save** toolbar button

Tax Code	Tax code name (ie. Indiana Sales Tax)
Description	A more detailed description of the tax (optional)
Tax Class	User can select from different tax classes created in **Tax Classes** screen. **Required field.**
Tax Agency	This is who the tax check will be written to when payment is issued. This tax will be tracked to the tax agency.
Address	User enters address of tax agency.
Zip/Postal Code	Zip/Postal Code of the tax. **Required field.**
State	User can define the state associated with the tax. Needed to create templates from tax schedule. **Required field.**
Country	User can define the country associated with the tax. Needed to create templates from tax schedule. **Required field.**
City	User can define the city associated with the tax. Needed to create templates from tax schedule. **Required field.**
County	User can define the county associated with the tax.
Match Tax Address	Default to being checked. If unchecked, the system will not search for a match based on the address and will just tax if it is in the tax group list.
Sales Tax Account	Select from accounts under Sales Tax Account category and Purchase Tax Account category. **Required field.**
Purchase Tax Account	Select from accounts under Sales Tax Account category and Purchase Tax Account category. **Required field.**
Tax Adjustment Account	User can select the GL account for Tax Adjustment Account
Add to Cost	If the check box is checked, the tax amount will be added to Cost or COGS.

Tax Exemption Account for Sales	User can select the GL account for Tax Exemption of Sales Tax
Tax Exemption Account for Purchase	User can select the GL account for Tax Exemption of Purchase Tax
Taxable by Other Taxes	A list of other existing tax codes
Tax Only / Balance	1. If tax only is checked, tax only the amount of the tax by the calculation. 2. If balance is checked, tax the base amount plus the tax.
Expense Account Override	Enable the customer to expense the tax on an item to the expense account.
Include in invoice price	If the check box is checked, tax will be included in the Invoice Price
Motor Fuel Tax Category	Displays values that matches the Tax Code's State/Province field
Store Tax No.	The tax code will be associated to the Store Tax No. entered used on Registers tracking
Checkoff Tax	If the check box is checked, the calculated amount will be offset into the invoice amount for that line item
Pay To Vendor	Selection of vendor entities
Texas Loading Fee	"Texas Loading Fee" or "Texas Petroleum Products Delivery Fee". In reality, this is a Tax levied by the State, but not a Fee/Surcharge initiated by a Vendor or iRely Customer.
Effective Date	Date when tax rate will be effective
Calculation Method	Either % of total or an amount per dollar
Rate	Enter either the percentage or the amount per dollar

1. On the user's menu panel go to **Common Info** folder then click **Tax Codes**
   a. If there are existing records, **Search Tax Codes** screen will open
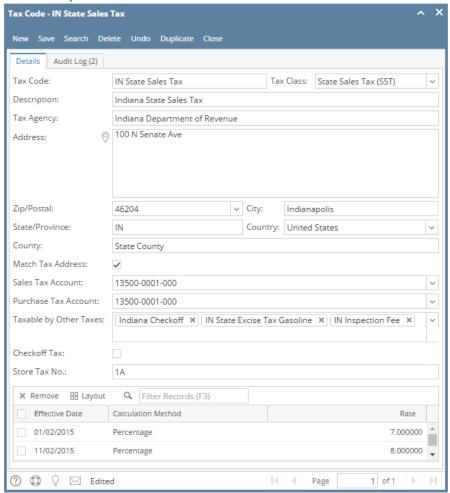   b. If there is no existing record, the new **Tax Codes** screen will open
2. From **Search Tax Codes** screen click **New** toolbar button

3. Enter necessary details on the form

Tax Code - IN State Sales Tax

New Save Search Delete Undo Duplicate Close

Details | Audit Log (2)

Tax Code:	IN State Sales Tax
Tax Class:	State Sales Tax (SST)
Description:	Indiana State Sales Tax
Tax Agency:	Indiana Department of Revenue
Address:	100 N Senate Ave
Zip/Postal:	46204
City:	Indianapolis
State/Province:	IN
Country:	United States
County:	County 01
Match Tax Address:	✓
Sales Tax Account:	13500-0002-000
Purchase Tax Account:	13500-0000-000
Taxable by Other Taxes:	IN Checkoff ✕ IN State Excise Tax Diesel Clear ✕
Checkoff Tax:	✓
Motor Fuel Tax Category:	IN Gasoline Use Tax (GUT)
Store Tax No.:	01

✕ Remove   ▦ Layout   🔍 Filter Records (F3)

	Effective Date	Calculation Method	Rate
☐	1/1/2010	Percentage	6.000000
☐	1/1/2015	Percentage	7.000000

Ready   Page 1 of 1

4. Click **Save** toolbar button

Tax Code	Tax code name (ie. Indiana Sales Tax)
Description	A more detailed description of the tax (optional)
Tax Class	User can select from different tax classes created in **Tax Classes** screen. **Required field.**
Tax Agency	This is who the tax check will be written to when payment is issued. This tax will be tracked to the tax agency.
Address	User enters address of tax agency.
Zip/Postal Code	Zip/Postal Code of the tax. **Required field.**
State	User can define the state associated with the tax. Needed to create templates from tax schedule. **Required field.**
Country	User can define the country associated with the tax. Needed to create templates from tax schedule. **Required field.**
City	User can define the city associated with the tax. Needed to create templates from tax schedule. **Required field.**
County	User can define the county associated with the tax.
Match Tax Address	Default to being checked. If unchecked, the system will not search for a match based on the address and will just tax if it is in the tax group list.
Sales Tax Account	Select from accounts under Sales Tax Account category and Purchase Tax Account category. **Required field.**
Purchase Tax	Select from accounts under Sales Tax Account category and Purchase Tax Account category. **Required field.**

Account	
Taxable by Other Taxes	A list of other existing tax codes
Checkoff Tax	If the check box is checked, the calculated amount will be offset into the invoice amount for that line item
Motor Fuel Tax Category	Displays values that matches the Tax Code's State/Province field
Store Tax No.	The tax code will be associated to the Store Tax No. entered used on Registers tracking
Effective Date	Date when tax rate will be effective
Calculation Method	Either % of total or an amount per dollar
Rate	Enter either the percentage or the amount per dollar

1. On the user's menu panel go to **Common Info** folder then click **Tax Codes**
   a. If there are existing records, **Search Tax Codes** screen will open
   b. If there is no existing record, the new **Tax Codes** screen will open
2. From **Search Tax Codes** screen click **New** toolbar button
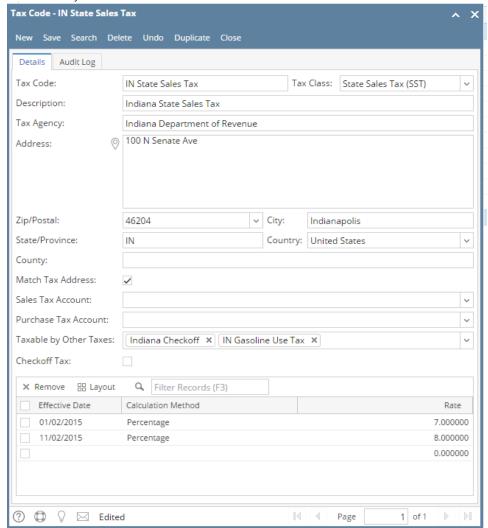3. Enter necessary details on the form

4. Click **Save** toolbar button

Tax Code	Tax code name (ie. Indiana Sales Tax)
Description	A more detailed description of the tax (optional)
Tax Class	User can select from different tax classes created in **Tax Classes** screen. **Required field.**
Tax Agency	This is who the tax check will be written to when payment is issued. This tax will be tracked to the tax agency.

Address	User enters address of tax agency.
Zip/Postal Code	Zip/Postal Code of the tax. **Required field.**
State	User can define the state associated with the tax. Needed to create templates from tax schedule. **Required field.**
Country	User can define the country associated with the tax. Needed to create templates from tax schedule. **Required field.**
City	User can define the city associated with the tax. Needed to create templates from tax schedule. **Required field.**
County	User can define the county associated with the tax.
Match Tax Address	Default to being checked. If unchecked, the system will not search for a match based on the address and will just tax if it is in the tax group list.
Sales Tax Account	Select from accounts under Sales Tax Account category and Purchase Tax Account category. **Required field.**
Purchase Tax Account	Select from accounts under Sales Tax Account category and Purchase Tax Account category. **Required field.**
Taxable by Other Taxes	A list of other existing tax codes
Checkoff Tax	If the check box is checked, the calculated amount will be offset into the invoice amount for that line item
Store Tax No.	The tax code will be associated to the Store Tax No. entered used on Registers tracking
Effective Date	Date when tax rate will be effective
Calculation Method	Either % of total or an amount per dollar
Rate	Enter either the percentage or the amount per dollar

1. On the user's menu panel go to **Common Info** folder then click **Tax Codes**
   a. If there are existing records, **Search Tax Codes** screen will open
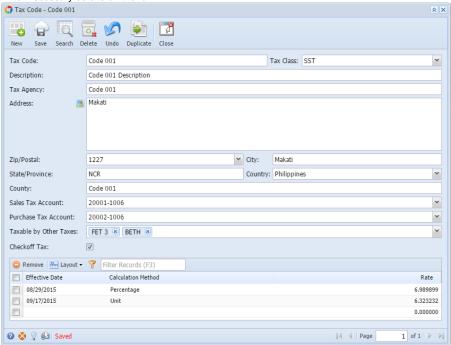   b. If there is no existing record, the new **Tax Codes** screen will open
2. From **Search Tax Codes** screen click **New** toolbar button

3. Enter necessary details on the form

4. Click **Save** toolbar button

Tax Code	Tax code name (ie. Indiana Sales Tax)
Description	A more detailed description of the tax (optional)
Tax Class	User can select from different tax classes created in **Tax Classes** screen.
Tax Agency	This is who the tax check will be written to when payment is issued. This tax will be tracked to the tax agency.
Address	User enters address of tax agency.
State	User can define the state associated with the tax. Needed to create templates from tax schedule.
Country	User can define the country associated with the tax. Needed to create templates from tax schedule.
City	User can define the city associated with the tax. Needed to create templates from tax schedule.
County	User can define the county associated with the tax.
Match Tax Address	Default to being checked. If unchecked, the system will not search for a match based on the address and will just tax if it is in the tax group list.
Sales Tax Account	Select from accounts under Sales Tax Account category and Purchase Tax Account category
Purchase Tax Account	Select from accounts under Sales Tax Account category and Purchase Tax Account category
	A list of other existing tax codes

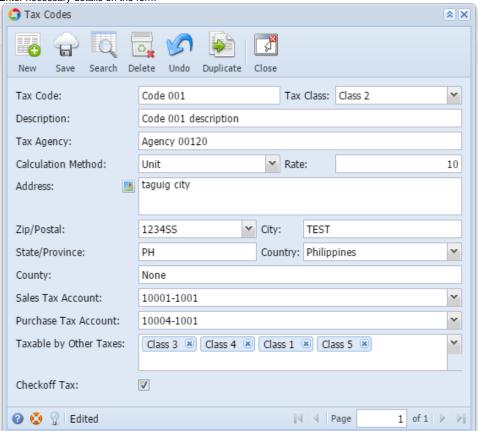| Taxable by Other Taxes	
Checkoff Tax	If the check box is checked, the calculated amount will be offset into the invoice amount for that line item
Effective Date	Date when tax rate will be effective
Calculation Method	Either % of total or an amount per dollar
Rate	Enter either the percentage or the amount per dollar

1. On the user's menu panel go to **Common Info** folder then click **Tax Codes**
   a. If there are existing records, **Search Tax Codes** screen will open
   b. If there is no existing record, the new **Tax Codes** screen will open
2. From **Search Tax Codes** screen click **New** toolbar button
3. Enter necessary details on the form

4. Click **Save** toolbar button

Tax Code	Tax code name (ie. Indiana Sales Tax)
Description	A more detailed description of the tax (optional)
Tax Class	User can select from different tax classes created in **Tax Classes** screen.
Tax Agency	This is who the tax check will be written to when payment is issued. This tax will be tracked to the tax agency.
Address	User enters address of tax agency.
State	User can define the state associated with the tax. Needed to create templates from tax schedule.
Country	User can define the country associated with the tax. Needed to create templates from tax schedule.
City	User can define the city associated with the tax. Needed to create templates from tax schedule.
County	User can define the county associated with the tax.
Sales Tax Account	Select from accounts under Sales Tax Account category and Purchase Tax Account category
Purchase Tax Account	Select from accounts under Sales Tax Account category and Purchase Tax Account category
Taxable by Other Taxes	A list of tax classes that will be taxable on this code
Checkoff Tax	If the check box is checked, the calculated amount will be offset into the invoice amount for that line item

Effective Date	Date when tax rate will be effective
Calculation Method	Either % of total or an amount per dollar
Rate	Enter either the percentage or the amount per dollar

1. On the user's menu panel go to **Common Info** folder then click **Tax Codes**
    a. If there are existing records, **Search Tax Codes** screen will open
    b. If there is no existing record, the new **Tax Codes** screen will open
2. From **Search Tax Codes** screen click **New** toolbar button
3. Enter necessary details on the form

4. Click **Save toolbar button**

1. From **Common Info** folder, double click **Tax Code**
    a. If there are existing records, **Search Tax Codes** screen will open
    b. If there is no existing record, the new **Tax Codes** screen will open
2. From **Search Tax Codes** screen click **New** toolbar button

3. Enter necessary details on the form

4. Click **Save toolbar button**