

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

Tax Code - IN State Sales Tax

NewSaveSearchDeleteUndoDuplicateClose

DetailsAudit Log

Tax Code

IN State Sales Tax

Tax Class

State Sales Tax (SST)

Description

Indiana State Sales Tax

Tax Agency

Address

100 N Senate Ave

Zip/Postal

46204

City

Indianapolis

State/Province

IN

Country

United States

County

Match Tax Address

☒

Sales Tax Account

13500-0000-000

Purchase Tax Account

13500-0000-000

Tax Adjustment Account

21100-4001-001

Add To Cost

☐ Tax Exemption Account for Sales

☐ Tax Exemption Account for Purchases

Taxable by Other Taxes

Expense Account Override

☐

Include in Invoice Price

☐

Motor Fuel Tax Category

IN Excise Tax Gasoline

Checkoff Tax

☐ Tax Point

Pay To Vendor

Texas Loading Fee (PPD)

☐

X RemoveExportViewFilter (F3)

Effective Date

Calculation Method

Unit of Measure

Rate

Gasoline Item Category

☐ 5/1/2022 12:00 ...

Percentage

5.000000

☐ 8/9/2018 12:00 ...

Percentage

5.000000

☐ 1/1/2015 12:00 ...

Percentage

7.000000

☐ 1/1/2010 12:00 ...

Percentage

6.000000

☐

0.000000

2.66sReady

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- 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	<ol style="list-style-type: none"> 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

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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
<input type="checkbox"/> 1/1/2010	Percentage	6.000000
<input type="checkbox"/> 1/1/2015	Percentage	7.000000

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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

- On the user's menu panel go to **Common Info** folder then click **Tax Codes**
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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: State County

Match Tax Address: ☒

Sales Tax Account: 13500-0001-000

Purchase Tax Account: 13500-0001-000

Taxable by Other Taxes: Indiana Checkoff x IN State Excise Tax Gasoline x IN Inspection Fee x

Checkoff Tax: ☐

Store Tax No.: 1A

x Remove Layout Filter Records (F3)

<input type="checkbox"/> Effective Date	Calculation Method	Rate
<input type="checkbox"/> 01/02/2015	Percentage	7.000000
<input type="checkbox"/> 11/02/2015	Percentage	8.000000

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- Click **Save** toolbar button

Tax Code	Tax code name (ie. Indiana Sales Tax)
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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

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New Save Search Delete Undo Duplicate Close

Details Audit Log

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:

Match Tax Address:

☒

Sales Tax Account:

Purchase Tax Account:

Taxable by Other Taxes:

Indiana Checkoff

IN Gasoline Use Tax

Checkoff Tax:

☐

Remove

Layout

Filter Records (F3)

<input type="checkbox"/>	Effective Date	Calculation Method	Rate
<input type="checkbox"/>	01/02/2015	Percentage	7.000000
<input type="checkbox"/>	11/02/2015	Percentage	8.000000
<input type="checkbox"/>			0.000000

?

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Page

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of 1

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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

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- Enter necessary details on the form

- 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

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

The screenshot shows a 'Tax Codes' window with a toolbar at the top containing icons for New, Save, Search, Delete, Undo, Duplicate, and Close. The 'New' button is highlighted. Below the toolbar, the form fields are as follows:

- Tax Code:** Code 001
- Tax Class:** Class 2
- Description:** Code 001 description
- Tax Agency:** Agency 00120
- Calculation Method:** Unit
- Rate:** 10
- Address:** taguig city
- Zip/Postal:** 1234SS
- City:** TEST
- State/Province:** PH
- Country:** Philippines
- County:** None
- Sales Tax Account:** 10001-1001
- Purchase Tax Account:** 10004-1001
- Taxable by Other Taxes:** Class 3, Class 4, Class 1, Class 5
- Checkoff Tax:** ☒

The bottom status bar shows 'Edited' and 'Page 1 of 1'.

- Click **Save** toolbar button
- From **Common Info** folder, double click **Tax Code**
 - If there are existing records, **Search Tax Codes** screen will open
 - If there is no existing record, the new **Tax Codes** screen will open
- From **Search Tax Codes** screen click **New** toolbar button

3. Enter necessary details on the form

The screenshot shows a 'Tax Codes' form with the following details:

- Tax Code:** 001
- Type:** 1
- Description:** TEST
- Calculation Method:** Percentage
- Rate:** 10
- Tax Agency:** 1
- Address:** Makati
- Zip/Postal:** 1227
- City:** Makati
- State/Province:** NCR
- Country:** Philippines
- Sales Tax Account:** 10170-0000
- Purchase Tax Account:** 10180-0000
- Taxable:** ☒
- Seperate on Invoice:** ☒

The toolbar at the top includes buttons for New, Save, Search, Delete, Undo, and Close. The 'Save' button is highlighted. The bottom status bar shows 'Edited' and 'Page 1 of 1'.

4. Click **Save** toolbar button