

How to Add a Tax Group

- 1. On the user's menu panel go to **Common Info** menu then click **Tax Groups**
- 2. From **Search Tax Group** screen click **New** toolbar button
- 3. Input record details (**Tax Group** and **Description**) on the header in **Tax Group** screen
- 4. Select a **Tax Code** on the grid. User can select as many codes as desired to group.
- 5. Select **Category Exemptions** for each tax codes

Tax Group - Checkoff

New Save Search Delete Undo Duplicate Close

DetailsAudit Log

Tax Group * Checkoff

Description * Checkoff

OpenRemoveExportViewFilter (F3)

<input type="checkbox"/> Tax Code	Description	Tax Class
<input checked="" type="checkbox"/> IN Checkoff	Indiana Checkoff Tax	Checkoff
<input type="checkbox"/> HST	HST	Canadian Taxes
<input type="checkbox"/>		

Category Exemptions

Remove

☐ Category

☒ GAS

☐

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Label	Description
Tax Group	Tax group name (ie. Allen County IN sales tax)
Description	A more detailed description of the name given to the group.
Tax Code	User selects the codes to associate with this tax group. User can select as many codes as desired to group. A list is created that is associated with the tax group.
Category Exemptions	This is used when there might be exemptions for certain categories of products in certain states.

- 6. Click **Save** toolbar button.

- 1. On the user's menu panel go to **Common Info** folder then click **Tax Groups**
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Tax Group - IN

New Save Search Delete Undo Duplicate Close

DetailsAudit Log (4)

Tax Group: IN

Description: Indiana

4. Select a Tax Code on the grid. User can select as many codes as desired to group.

Open Remove Layout Filter Records (F3)

Tax Code	Description
<input type="checkbox"/> IN State Sales Tax	Indiana State Sales Tax
<input type="checkbox"/> IN State Excise Tax Gasoline	IN State Excise Tax Gasoline
<input type="checkbox"/> IN Gasoline Use Tax	IN Gasoline Use Tax (GUT)
<input checked="" type="checkbox"/> Federal Excise Tax Gasoline	Federal Excise Tax Gasoline
<input type="checkbox"/> Tax Code	Description
<input type="checkbox"/> DUP: IN State Sales Tax	Indiana State Sales Tax
<input type="checkbox"/> OR State Excise Tax Diesel	OR State Excise Tax Diesel
<input type="checkbox"/> OR Misc Fuel Tax	OR Misc Fuel Tax
<input type="checkbox"/> OR State Excise Tax Gasoline	OR State Excise Tax Gasoline
<input type="checkbox"/> MI State Sales Tax	Michigan State Sales Tax
<input type="checkbox"/> Remote State Excise Tax Gasoline	Remote State Excise Tax Gasoline

Category Exemptions

Remove

Category

Page 1 of 1

5. Select Category Exemptions for each tax codes

Tax Group - IN

New Save Search Delete Undo Duplicate Close

Details Audit Log (4)

Tax Group: IN

Description: Indiana

Open Remove Layout Filter Records (F3)

Tax Code	Description
<input checked="" type="checkbox"/> IN State Sales Tax	Indiana State Sales Tax
<input type="checkbox"/> IN State Excise Tax Gasoline	IN State Excise Tax Gasoline
<input type="checkbox"/> IN Gasoline Use Tax	IN Gasoline Use Tax (GUT)
<input type="checkbox"/> Federal Excise Tax Gasoline	Federal Excise Tax Gasoline
<input type="checkbox"/> Federal Excise Tax Diesel (FET) Clear	Federal Excise Tax Diesel (FET) Clear
<input type="checkbox"/> Federal LUST Fee	Federal LUST Fee
<input type="checkbox"/> Federal Oil Spill Fee Diesel	Federal Oil Spill Fee Diesel
<input type="checkbox"/> Federal Oil Spill Fee Gasoline	Federal Oil Spill Fee Gasoline
<input type="checkbox"/> IN Inspection Fee	IN Inspection Fee
<input type="checkbox"/> IN State Excise Tax Diesel Clear	IN State Excise Tax Diesel Clear

Category Exemptions

Remove

Category

GAS

Category Code Description

GAS	Gasoline
DDSL	Dyed Diesel
CDSL	Clear Diesel
LPG	Propane
OTHER	Other
RM	Raw Material

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6. Click **Save** toolbar button.

Tax Group - Group 1
^
X

New Save Search Delete Undo Duplicate Close

Details Audit Log (0)

Tax Group: Group 1

Description: Tax Group 1

Open Remove Layout Filter Records (F3)

<input type="checkbox"/> Tax Code	Description
<input type="checkbox"/> Federal Excise Gasoline	Federal Excise Gasoline
<input type="checkbox"/> IN Inspection Fee	IN Inspection Fee
<input type="checkbox"/>	

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Page 1 of 1

Label	Description
Tax Group	Tax group name (ie. Allen County IN sales tax)
Description	A more detailed description of the name given to the group.
Tax Code	User selects the codes to associate with this tax group. User can select as many codes as desired to group. A list is created that is associated with the tax group.
Category Exemptions	This is used when there might be exemptions

- On the user's menu panel go to **Common Info** folder then click **Tax Groups**
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- From **Search Tax Group** screen click **New** toolbar button
- Input record details (**Tax Group** and **Description**) on the header in **Tax Group** screen

Tax Group - Group 1
^
X

New Save Search Delete Undo Duplicate Close

Details Audit Log

Tax Group: Group 1

Description: Tax Group 1

4. Select a Tax Code on the grid. User can select as many codes as desired to group.

Tax Code	Description
dfsdfsdfsdf	Indiana State Sales Tax
DUP: IN State S...	Indiana State Sales Tax
Federal Excise ...	Federal Excise Diesel (FET)
Federal Excise ...	Federal Excise Gasoline
Federal LUST F...	Federal LUST Fee (Dyed Diesel Only)
Federal Oil Spill...	Federal Oil Spill Fee Diesel
Federal Oil Spill...	Federal Oil Spill Fee Gasoline
IN Gasoline Us...	IN Gasoline Use Tax (GUT)
IN Inspection F...	IN Inspection Fee
IN State Excise ...	IN State Excise Tax Diesel Clear
IN State Excise ...	IN State Excise Tax Gasoline
IN State Sales T...	Indiana State Sales Tax

5. Click **Save** toolbar button.

Tax Group - Group 1

New Save Search Delete Undo Duplicate Close

Details Audit Log (0)

Tax Group: Group 1
 Description: Tax Group 1

Tax Code	Description
Federal Excise Gasoline	Federal Excise Gasoline
IN Inspection Fee	IN Inspection Fee

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Tax Group - Group 001

New Save Search Delete Undo Duplicate Close

Tax Group: Group 001

Description: Group 001 Description

4. Select a Tax Code on the grid. User can select as many codes as desired to group.

View Remove Layout Filter Records (F3)

☒ Tax Code Description

☒ [Dropdown]

Tax Code	Description
DUP: Code 001	Code 001 description
Code 003	Code 003
Code 002	Code 002 description
Code 001	Code 001 description

5. Click **Save** toolbar button.

Tax Group - Group 001

New Save Search Delete Undo Duplicate Close

Tax Group: Group 001

Description: Group 001 Description

View Remove Layout Filter Records (F3)

<input type="checkbox"/> Tax Code	Description
<input type="checkbox"/> Code 001	Code 001 Description
<input type="checkbox"/> Code 002	Code 002
<input type="checkbox"/> Code 003	Code 003
<input type="checkbox"/> Code 003	Code 003
<input type="checkbox"/> Code 004	Code 004

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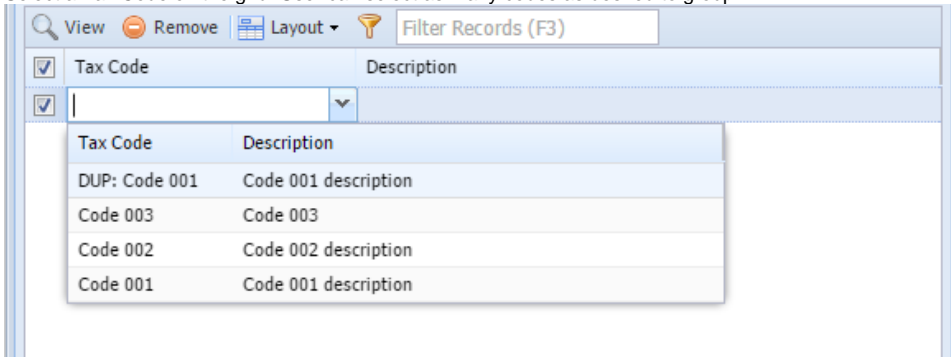
Tax Group

New Save Search Delete Undo Duplicate Close

Tax Group: Group 1

Description: Group 1 description

4. Select a Tax Code on the grid. User can select as many codes as desired to group.



Tax Code	Description
DUP: Code 001	Code 001 description
Code 003	Code 003
Code 002	Code 002 description
Code 001	Code 001 description

5. Click **Save** toolbar button.

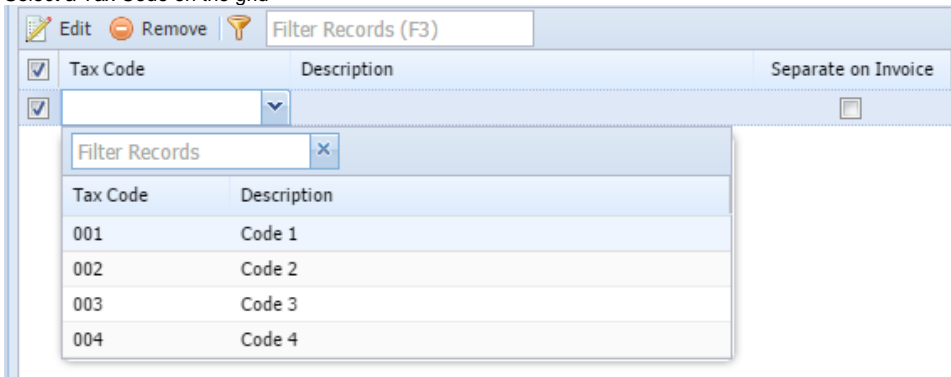
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2. From **Search Tax Group** screen click **New** toolbar button
3. Input record details (**Tax Group** and **Description**) on the header in **Tax Group** screen




Tax Group: Tax Group 1

Description: Tax Group 1

4. Select a Tax Code on the grid



Tax Code	Description
001	Code 1
002	Code 2
003	Code 3
004	Code 4

 User can select as many codes as desired to group.

5. Click **Save** toolbar button.

Tax Group

New

Save

Search

Delete

Undo

Close

Tax Group:

Tax Group 1

Description:

Tax Group 1

Edit

Remove

Filter Records (F3)

<input type="checkbox"/>	Tax Code	Description	Separate on Invoice
<input type="checkbox"/>	001	Code 1	<input type="checkbox"/>
<input type="checkbox"/>	002	Code 2	<input checked="" type="checkbox"/>
<input type="checkbox"/>	003	Code 3	<input type="checkbox"/>
<input type="checkbox"/>	004	Code 4	<input checked="" type="checkbox"/>
<input type="checkbox"/>			<input type="checkbox"/>

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