

# How to View or Edit a Tax Code in a Tax Group

1. On the user's menu panel go to **Common Info** folder then click **Tax Groups**
2. From **Search Tax Group** screen, select a record from the list and click **View** button.

The screenshot shows a web application window titled "Tax Group - IN". At the top, there is a menu bar with options: New, Save, Search, Delete, Undo, Duplicate, and Close. Below the menu bar, there are two tabs: "Details" (selected) and "Audit Log (5)".

The main content area is divided into several sections:

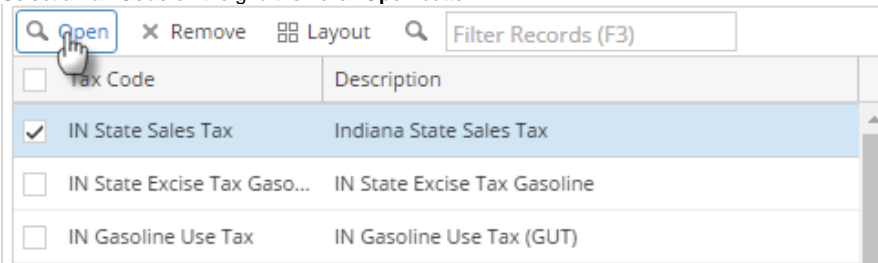
- Tax Group:** A text field containing "IN".
- Description:** A text field containing "Indiana".
- Filter Records (F3):** A search bar with a magnifying glass icon and the text "Filter Records (F3)".
- Tax Code List:** A table with two columns: "Tax Code" and "Description". Each row has a checkbox in the "Tax Code" column.
- Category Exemptions:** A panel on the right with a "Remove" button and a "Category" section.

The "Tax Code List" table contains the following data:

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

At the bottom of the window, there is a status bar with a "Ready" indicator and a "Page 1 of 1" display.

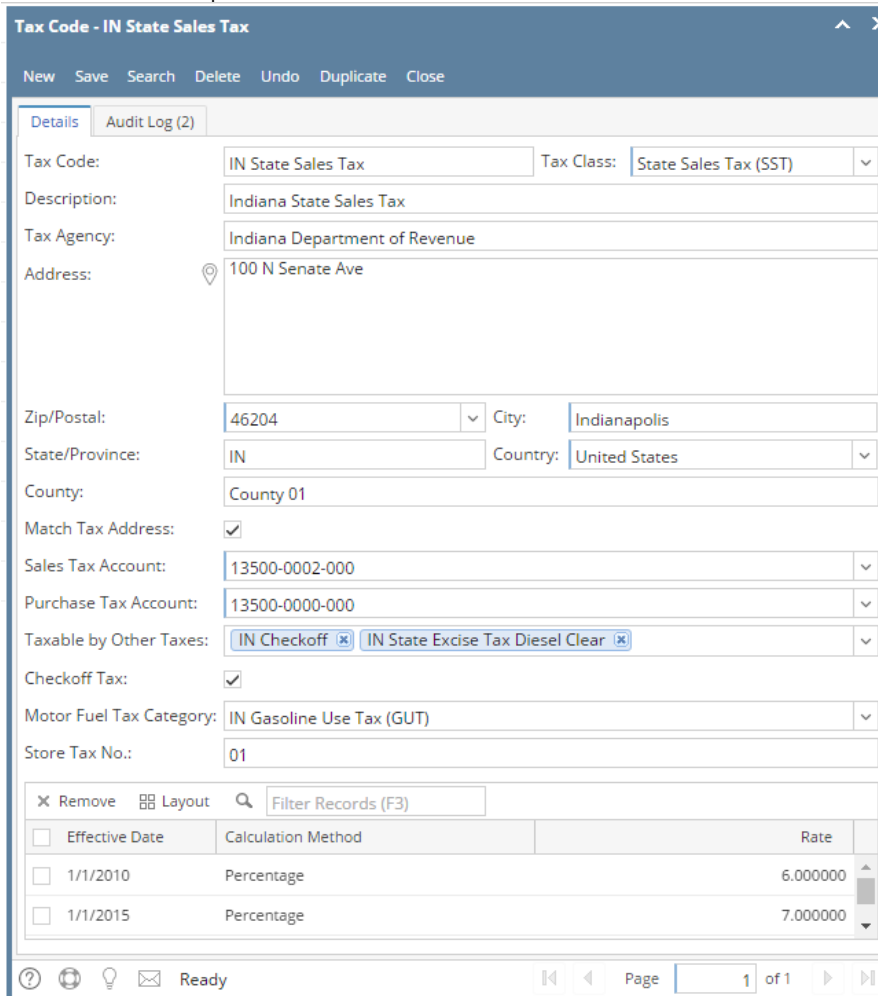
3. Select a **Tax Code** on the grid then click **Open** button



The screenshot shows a table with two columns: 'Tax Code' and 'Description'. The first row is selected, showing 'IN State Sales Tax' and 'Indiana State Sales Tax'. Above the table is a toolbar with buttons: 'Open' (highlighted with a mouse cursor), 'Remove', 'Layout', and a search box labeled '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 Gaso...	IN State Excise Tax Gasoline
<input type="checkbox"/> IN Gasoline Use Tax	IN Gasoline Use Tax (GUT)

**Tax Code screen** will open with the record details:



The screenshot shows the 'Tax Code - IN State Sales Tax' screen. It has a menu bar with 'New', 'Save', 'Search', 'Delete', 'Undo', 'Duplicate', and 'Close'. Below the menu bar are two tabs: 'Details' (selected) and 'Audit Log (2)'. The 'Details' tab contains various fields for tax information, including 'Tax Code', 'Description', 'Tax Agency', 'Address', 'Zip/Postal', 'City', 'State/Province', 'Country', 'County', 'Match Tax Address', 'Sales Tax Account', 'Purchase Tax Account', 'Taxable by Other Taxes', 'Checkoff Tax', 'Motor Fuel Tax Category', and 'Store Tax No.'. At the bottom, there is a table with columns 'Effective Date', 'Calculation Method', and 'Rate'.

**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

Ready Page 1 of 1

4. When changes on Tax Code is saved, Tax Group will automatically be updated

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

2. From **Search Tax Group** screen, select a record from the list and click **View** button.

Tax Group - Group 1

New Save Search Delete Undo Duplicate Close

Details Audit Log

Tax Group: Group 1

Description: Tax Group 1

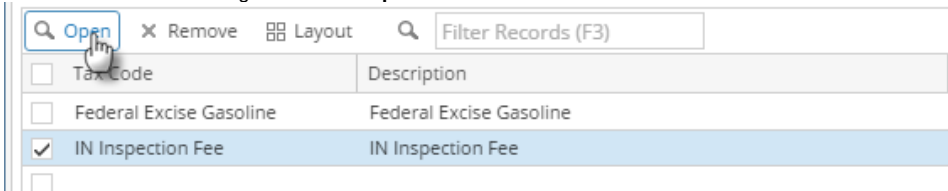
Open Remove Layout Filter Records (F3)

<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"/>	

Ready

Page 1 of 1

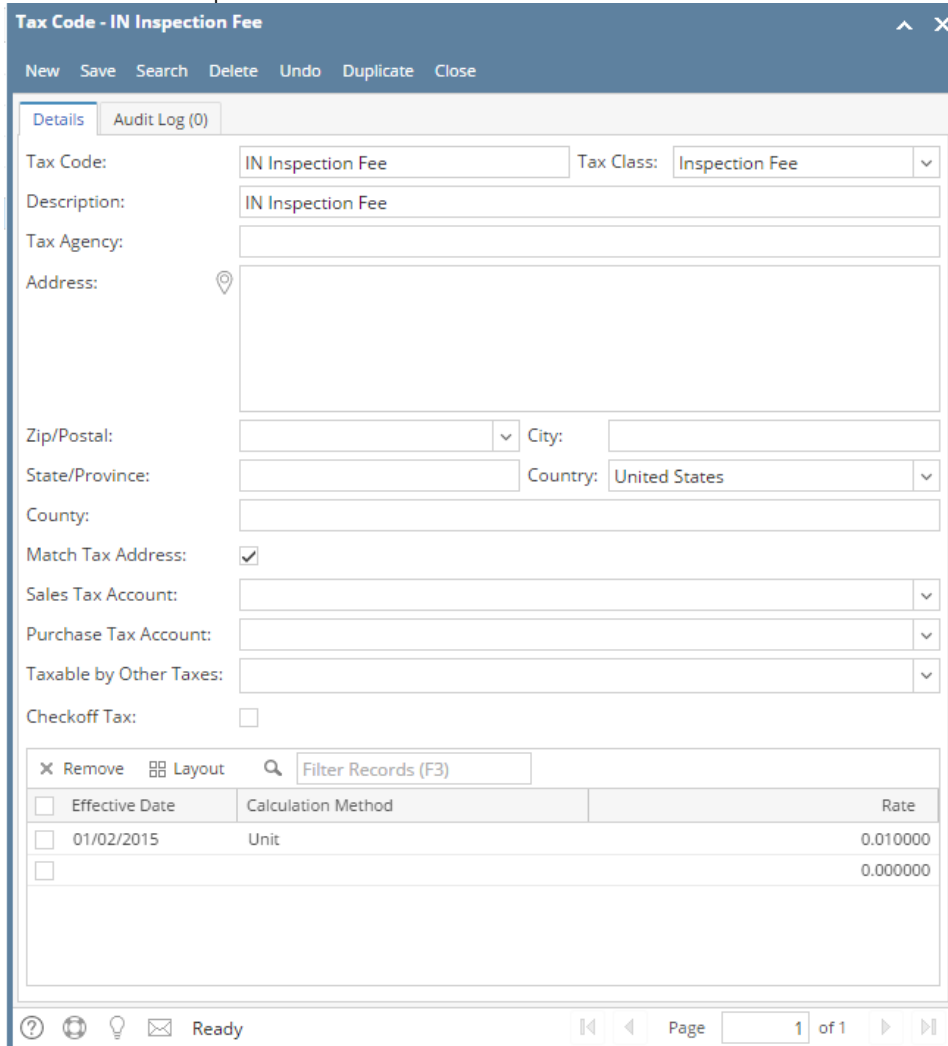
3. Select a **Tax Code** on the grid then click **Open** button



The screenshot shows a table with two columns: 'Tax Code' and 'Description'. The first row is 'Federal Excise Gasoline'. The second row, 'IN Inspection Fee', is selected and highlighted in blue. Above the table is a toolbar with buttons: 'Open' (with a magnifying glass icon), 'Remove' (with an 'x' icon), 'Layout' (with a grid icon), and a search box labeled 'Filter Records (F3)'. A mouse cursor is clicking the 'Open' button.

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

**Tax Code screen** will open with the record details:



The screenshot shows the 'Tax Code - IN Inspection Fee' window. It has a title bar with a maximize button and a close button. Below the title bar is a menu bar with 'New', 'Save', 'Search', 'Delete', 'Undo', 'Duplicate', and 'Close'. The main area has two tabs: 'Details' (selected) and 'Audit Log (0)'. The 'Details' tab contains several fields: 'Tax Code:' (IN Inspection Fee), 'Tax Class:' (Inspection Fee), 'Description:' (IN Inspection Fee), 'Tax Agency:', 'Address:' (with a location pin icon), 'Zip/Postal:', 'City:', 'State/Province:', 'Country:' (United States), 'County:', 'Match Tax Address:' (checked), 'Sales Tax Account:', 'Purchase Tax Account:', 'Taxable by Other Taxes:', and 'Checkoff Tax:' (unchecked). At the bottom of the window is a toolbar with 'Remove', 'Layout', and a search box 'Filter Records (F3)'. Below the toolbar is a grid with three columns: 'Effective Date', 'Calculation Method', and 'Rate'. The grid contains two rows of data.

Effective Date	Calculation Method	Rate
<input type="checkbox"/> 01/02/2015	Unit	0.010000
<input type="checkbox"/>		0.000000

4. When changes on Tax Code is saved, Tax Group will automatically be updated

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

2. From **Search Tax Group** screen, select a record from the list and click **View** button.

Tax Group: Group 001

Description: Group 001 Description

Tax Code	Description
Code 001	Code 001 Description
Code 002	Code 002
Code 003	Code 003
Code 003	Code 003
Code 004	Code 004

3. Select a **Tax Code** on the grid then click **View** button

View Remove Layout Filter Records (F3)

Tax Code	Description
Code 001	Code 001 Description
Code 002	Code 002
Code 003	Code 003
Code 003	Code 003
Code 004	Code 004

**Tax Code screen** will open with the record details:

Tax Code: Code 003 Tax Class: SST

Description: Code 003

Tax Agency: Code 003

Address: US

Zip/Postal: 43318 City: De Graff

State/Province: OH Country: United States

County: Code 003

Sales Tax Account: 20001-1006

Purchase Tax Account: 20002-1006

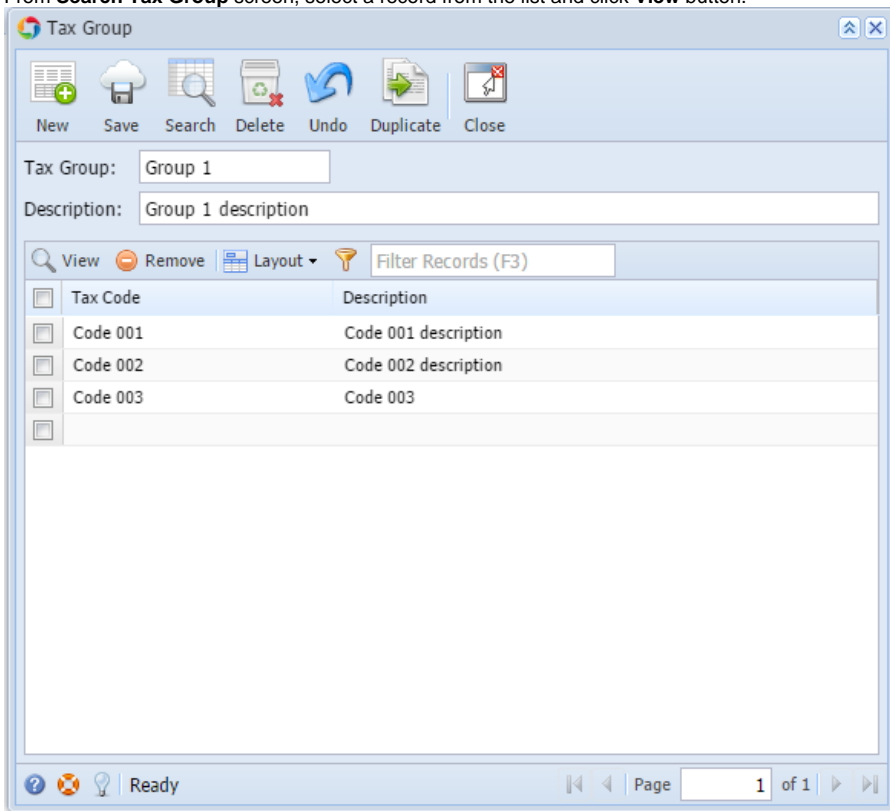
Taxable by Other Taxes:

Checkoff Tax: ☒

Effective Date	Calculation Method	Rate
08/13/2015	Unit	6.323332

4. When changes on Tax Code is saved, Tax Group will automatically be updated
1. On the user's menu panel go to **Common Info** folder then click **Tax Groups**

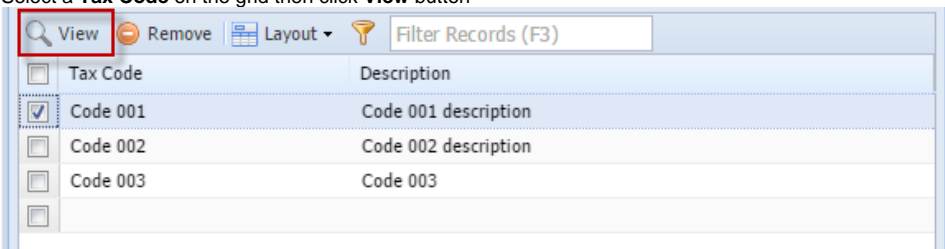
2. From **Search Tax Group** screen, select a record from the list and click **View** button.



The screenshot shows a software window titled "Tax Group". At the top is a toolbar with icons for New, Save, Search, Delete, Undo, Duplicate, and Close. Below the toolbar are two text input fields: "Tax Group:" containing "Group 1" and "Description:" containing "Group 1 description". Under these fields is a secondary toolbar with "View", "Remove", "Layout", and a "Filter Records (F3)" search box. The main area contains a table with two columns: "Tax Code" and "Description". The table lists three entries: "Code 001" with description "Code 001 description", "Code 002" with description "Code 002 description", and "Code 003" with description "Code 003". Each row has a checkbox on the left. The status bar at the bottom shows "Ready" and "Page 1 of 1".

Tax Code	Description
Code 001	Code 001 description
Code 002	Code 002 description
Code 003	Code 003

3. Select a **Tax Code** on the grid then click **View** button

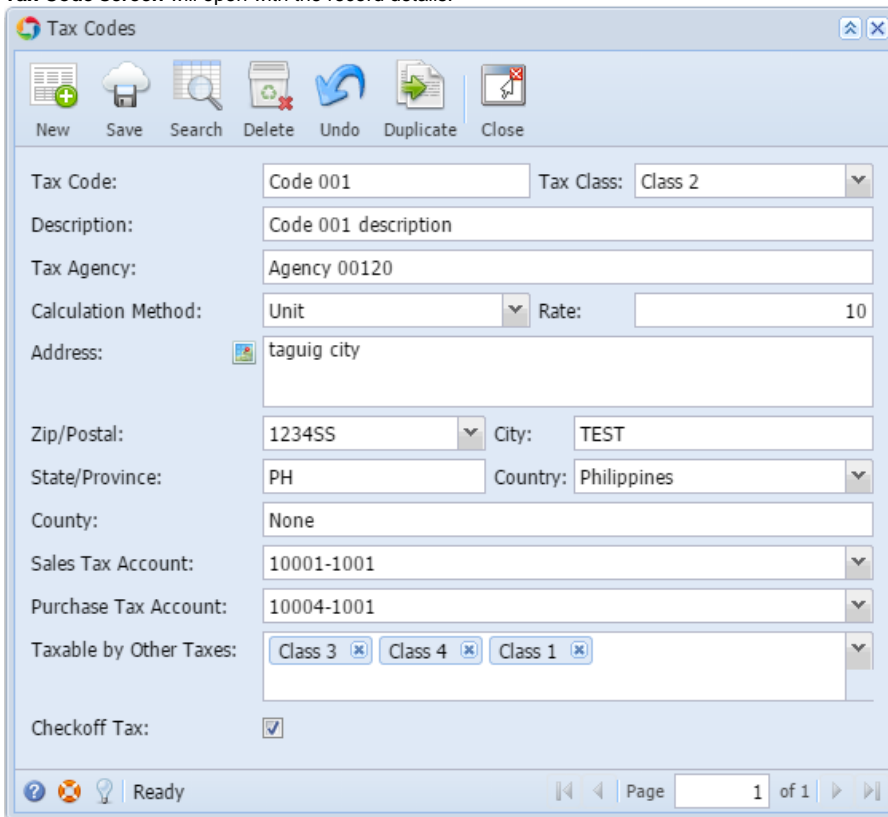


The screenshot shows a software interface with a toolbar at the top containing buttons for 'View', 'Remove', 'Layout', and 'Filter Records (F3)'. Below the toolbar is a grid with two columns: 'Tax Code' and 'Description'. The grid contains three rows of data:

Tax Code	Description
Code 001	Code 001 description
Code 002	Code 002 description
Code 003	Code 003

The 'View' button in the toolbar is highlighted with a red rectangular box.

**Tax Code screen** will open with the record details:



The screenshot shows the 'Tax Codes' screen with a toolbar at the top containing icons for 'New', 'Save', 'Search', 'Delete', 'Undo', 'Duplicate', and 'Close'. Below the toolbar are various input fields for tax code details:

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  
Checkoff Tax: ☒

The status bar at the bottom shows 'Ready' and 'Page 1 of 1'.

4. When changes on Tax Code is saved, Tax Group will automatically be updated