

Sales Tax

Last Modified on 01/06/2023 3:38 pm EST

Adding Sales Tax

To begin, click "Add Sales Tax" in the upper left corner of the page.



Complete Fields

Complete sales tax fields.

Tax Code ▼	Description ▼	Recurring T	Non Recurring T	Is Base	Break Out	GL Account	Rate ▼	
Yemassee T	Yemassee Town Hampton	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	654 - F ▼	5	<input checked="" type="checkbox"/> <input type="checkbox"/>

Tax Code

This code can be an abbreviation or a code given to you by your tax agency.

*Note: create a tax code called "No Tax" or "None" if sales tax is not applicable.

Description

Enter a description of the tax. This may be the same as the tax code. You can decide if you want to show this description on invoices in (hyperlink).

Recurring/Non Recurring

Select the checkbox for "Recurring" if there are recurring items that are taxable, for example, monitoring. Likewise, select the checkbox for "Non Recurring" for non-recurring taxable items, for example, parts and labor. You may check both boxes if applicable.

Base/Breakout

A tax can be set as a base tax if it will apply to all customers, for example, a state tax. Other taxes, such as city or county taxes, can then be linked to a base tax if they are needed in addition to the base tax. If Breakout is selected for a tax, the tax breakdown will be shown on the invoice for the customer to see.

GL Account

Select the general ledger account you would like to link to this tax code to using the drop-down box (GL hyperlink)

Save

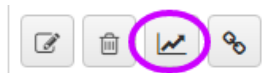
Click the checkmark icon to the right of the sales tax to save.

Tax Code	Description	Recurring T	Non Recurring T	Is Base	Break Out	GL Account	Rate	
Yemassee T	Yemassee Town Hampton	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	654 - F	5	<input checked="" type="checkbox"/> <input type="checkbox"/>

Adding a Tax Rate to a Sales Tax

Graph Icon

Click the graph icon to the right of the sales tax to add a rate.



Add Sales Tax Rate

Click "Add Sales Tax Rate" in the upper left-hand corner of the page.



Complete Fields

Complete the tax rate fields.

Sales Tax	Tax Rate	Start Date	End Date	
MD	5	5/18/2016 <input type="text"/>	<input type="text"/>	<input checked="" type="button" value="Update"/> <input type="button" value="Cancel"/>

Tax rate

Enter the tax rate (a percentage).

Start Date

Enter the date this tax rate begins. AlarmBiller will default to the current date if you do not manually input a start date.

End Date

Enter an end date for the tax rate if applicable. If you do not enter an "End Date", AlarmBiller will automatically enter 12/31/9999 as the end date.

Update

Click "Update" on the right side of the screen to save. This tax rate will remain until you change it.

Sales Tax	Tax Rate	Start Date	End Date	
MD	5	5/18/2016		<input checked="" type="button" value="Update"/> <input type="button" value="Cancel"/>

Edit

If you get a notice that in the future a tax rate will need to be changed, you can edit the current tax rate. To begin, click the "Edit" button to the right of the tax rate you wish to change.

Sales Tax	Tax Rate	Start Date	End Date	
MD	5.000 %	05-18-2016	12-31-9999	<input checked="" type="button" value="Edit"/> <input type="button" value="Delete"/>
MD	9.500 %	05-12-2016	05-15-2016	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
MD	6.250 %	06-01-2015	05-11-2016	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
MD	6.000 %	06-09-2014	09-30-2014	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

End Date

Select the date this tax rate will end. Then press "Update" on the right side of the page:

Sales Tax	Tax Rate	Start Date	End Date	
MD	5	5/18/2016	8/9/2016	<input checked="" type="button" value="Update"/> <input type="button" value="Cancel"/>

Add New Sales Tax Rate

Input the new sales tax rate by using the steps above.