

Sales Tax File Maintenance

The Tax File defines all of the sales, fuel or excise taxes you collect, report and pay to the designated taxing authority. Once all of the taxes are set up, changes due to new regulations will be made here. In assigning fuel tax codes, it is preferable to start with the number 1 and increment by one for each tax code. There are three important master files in this module and they must be set up in the order listed below. Sales Tax codes for packaged goods and miscellaneous items must be set up here. Fuel tax files may be accessed either through the Fuel Inventory application, or through the Open Item Accounts Receivable application. Fuel tax and sales tax codes are combined into Tax Authorities codes which contain all the sales and tax codes that apply to a particular geographic territory (state, county, city). Every customer is assigned a Tax Authority so that the computer can calculate any tax applicable to that customer.

The Accounts Receivable Application allows access to the Fuel Tax Maintenance Module of the Fuel Inventory Application. Options 2 and 3 on the menu below are the same as options in Fuel Inventory. Taxes may be entered in either application. Sales Tax Maintenance may only be accessed through Accounts Receivable.

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Demo Company *** Tax File Maintenance Menu *** 01/09/2007

1. Sales Tax Maintenance
2. Fuel Tax Maintenance
3. Fuel Tax Exemption File
Q. Return to Main Menu

Make a Selection Q
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SALES TAX MAINTENANCE

Sales Tax File Maintenance allows you to input and define all of the sales taxes which apply to your sales area. Sales Tax codes may be broken down into State, City, County, MTA, and Other; or you may have only one code for each area which includes all applicable taxes. For example, San Antonio, Texas includes 6.25% Texas State sales tax, 1.00% City, and .50% MTA tax. The tax code could be set up using one code called San Antonio City with 7.75% tax or using three codes totaling to 7.75%. The Tax Authority Code (see Fuel Inventory Documentation) brings all the taxes together for each customer. Each Tax Code can print separately on Sales Invoices entered in the Fuel Inventory Module of The Complete Jobber and on the Tax Reports. The computer will track the taxable and nontaxable sales and tax collected for each taxing authority by Tax Code.