

Taxes Introduction

Setting Up Your Tax Categories and Tax Rates

The system makes it easy to calculate sales tax on all of your items. We even get you started with a **No Tax** category. You will first set up your tax categories, such as retail, food, alcohol, etc. Then, you will decide which tax category should be your default tax category. Later, when you create your items in your inventory, the system will automatically assign your default tax category to the items for you to save you time. Don't worry -- you can always change the tax category to something other than your default, as needed. By using a tax category that you assign to each item, the appropriate amount of sales tax will be calculated automatically. Each tax category includes a percentage value that determines the tax rate for items assigned to that category.

Tax Jurisdictions

The system also allows you to set up and report on multiple tax jurisdictions that are calculated independently of each other for those selling locations that require this tax scenario. We will also itemize the tax jurisdictions on the receipt, as is often required by local regulations. The tax jurisdictions are tied to your tax categories and selling locations. This means when you add a selling location, you can designate any local tax jurisdictions. Additionally, if you have already set up your tax locations and categories, you can simply edit the tax location to enable tax jurisdictions.

Multiple Selling Locations

Do you sell from multiple locations that require different tax rates (such as a food truck that moves between municipalities)? When you first visit the **Taxes** screen, you will see your default selling location, along with the **No Tax** category already created for you.

Taxes

+ ADD A TAX CATEGORY

Add new tax categories, or edit rates for your existing tax categories for the items you sell. You can also set tax rates for additional selling locations.

Location Name No Tax *
(0 Items)

✎ Savory Food 0.0000 %

* Default Tax Category

+ ADD A LOCATION

For example, a food truck that moves between municipalities with differing tax rates.

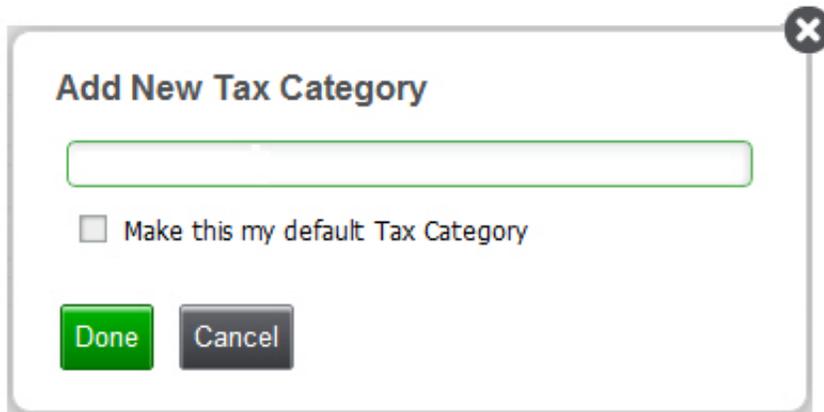
Save
Discard Changes

Add a Tax Category

By default, your store already has a **No Tax** tax category for use with tax-exempt items. To add a tax category:

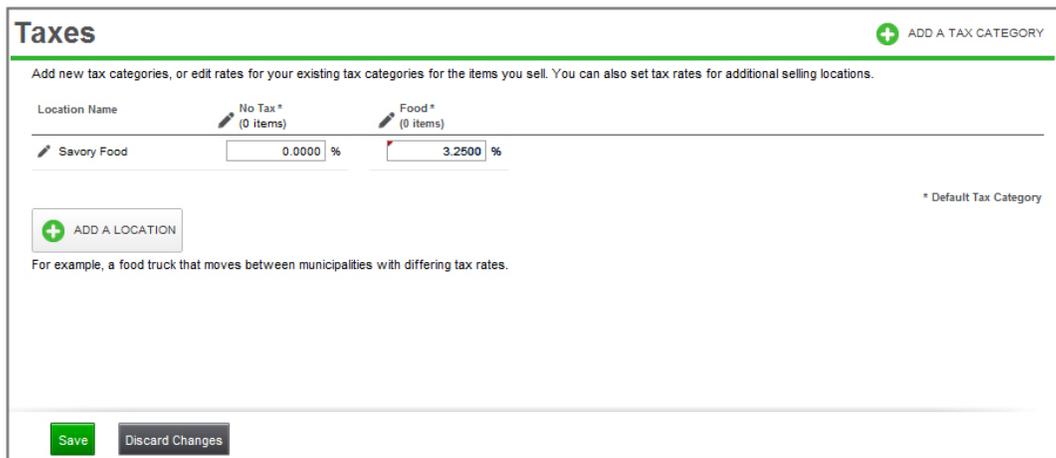
1. Click the **Settings**  icon located at the top-right corner of the screen.

2. Select **Taxes**.
3. Click the **ADD A TAX CATEGORY** button.
4. Enter a descriptive name for the new tax category in the popup screen.



 If this will be your default tax category, click **Make this my default Tax Category**. This will make it the tax category that will be automatically assigned to each new item you add to your inventory.

4. Click **Done**.
5. Click inside the tax rate box for the new tax category and enter the tax rate % that applies to the items in the tax category (such as, 3.250). (If you have multiple selling locations, you will need to enter the tax rate for every selling location).
6. Click **Save** to save the new tax category and its associated tax rate(s).
7. If your merchandise requires multiple tax categories, repeat this process for every tax category you need to create.



Location Name	No Tax * (0 items)	Food * (0 items)
Savory Food	0.0000 %	3.2500 %

Edit a Tax Category

If you want to edit an existing tax category:

1. Click the **Settings**  icon located at the top-right corner of the screen.
2. Select **Taxes**.
3. View your tax categories and then:
 - Click inside any of the tax category boxes to enter/edit the tax rate, and/or
 - Click on the tax category's name to edit the name of the tax category
3. Click **Done** to save your changes.

Remove a Tax Category

If you want to remove a tax category you have already set up:

1. Click the **Settings**  icon located at the top-right corner of the screen.
2. Select **Taxes**.
3. Click on the name of the tax category you want to delete.
3. Click **Delete** to delete the tax category. The **Delete** button will only be enabled if there are no items assigned to this tax category. The system will display an alert to let you confirm removing the tax category:
 - Click **Yes** to remove the tax category. If the selected tax category has any sales activity, the system will let you know, so that you can determine if you still want to remove the tax category.
 - Click **No** to keep the tax category.



Removing a tax category is a "soft delete". This means that although the tax category is removed from your view, all the data and activity associated with that tax category is still shown in reports, transactions, etc..

Do you sell from multiple locations that require different tax rates (such as a food truck that moves between municipalities)?