

Sales Tax Setup

Last Modified on 05/23/2025 4:29 pm EDT

Three setup methods will be described in this article.

- Entire state has the same tax rate
- Multiple Taxing Jurisdictions — setup one Sales Tax Record
- Multiple Taxing Jurisdictions — setup multiple Sales Tax Records

Entire State Same Tax Rate

From the main menu, arrive at the Sales Tax setup with this path: Setup > Accounting > Sales Tax.

The Sales Tax list will be displayed. Setting up a new Sales Tax record is a two-step process. First, create the Sales Tax record, and then setup the tax rate.

Click on the Add Sales Tax button at the upper left of the page.

| Tax Code | Description | Recurring | Non-Recurring | Base | Breakout | GL Account | Rate | |
|----------|----------------|--------------------------------------|--------------------------------------|--------------------------------------|--------------------------|-------------------------|---------|-------------|
| Austin | Austin-County | <input type="radio"/> NO | <input type="radio"/> NO | <input checked="" type="radio"/> YES | <input type="radio"/> NO | 23300 - Sales Tax | 0.1300% | Rates |
| D-SF | Delaware local | <input checked="" type="radio"/> YES | <input type="radio"/> NO | <input checked="" type="radio"/> YES | <input type="radio"/> NO | 23000 - Sales Tax | 2.0000% | Rates |
| FL | Florida | <input checked="" type="radio"/> YES | <input checked="" type="radio"/> YES | <input type="radio"/> NO | <input type="radio"/> NO | 23300 - Sales Tax | 8.2500% | Rates Link |
| OC | Geauga | <input checked="" type="radio"/> YES | <input checked="" type="radio"/> YES | <input type="radio"/> NO | <input type="radio"/> NO | 23300 - Sales Tax | 8.5550% | Rates Link |
| Gea | Gea | <input checked="" type="radio"/> YES | <input checked="" type="radio"/> YES | <input type="radio"/> NO | <input type="radio"/> NO | 25055 - Accrued Revenue | 7.0000% | Rates Link |

The Sales Tax Edit form opens. Each data entry field is described below.

Data entry fields preceded with an asterisk are required.

- ***Sales Tax Code:** Enter a code, maximum of 25 characters.
- ***Name:** Enter a description, maximum of 50 characters.
- **Recurring:** If recurring type services are possibly taxable in this jurisdiction, set the toggle to Yes.

Note: Individual Items and Parts may be flagged as taxable or non-taxable.

- **Non-Recurring:** If non-recurring type services are possibly taxable in this jurisdiction, set the toggle to Yes.
- **Base:** Set to No. This is only used if you are linking several Sales Tax records together for a combined rate.
- **Breakout:** Set to No. This is only set to Yes if you are linking several Sales Tax records together for a combined rate, and you want to print the amount of tax for each Sales Tax record separately on the customer invoice.
- ***GL Account:** From the drop-down list, select the GL Account to be used as the sales tax liability account.

When finished, click the save button at the bottom of the form.

Sales Tax Edit

Sales Tax Code • MI

Name • Michigan

Recurring ☒ YES ☐ NO

Non-Recurring ☒ YES ☐ NO

Base ☐ YES ☒ NO

Breakout ☐ YES ☒ NO

GL Account • 23700 - Sales Tax - Michigan

Save

Cancel

































You are returned to the Sales Tax list. Locate the Sales Tax record just created, and then click the Rates button.

Sales Tax

+ Add Sales Tax

Export to Excel

☐ NO Show base sales taxes only
 ☐ NO Show inactive sales taxes

| Tax Code | D. | Recurring | Non-Rec | Base | Breakout | GL Account | Rate | |
|----------|----------------|---|---|---|---|------------------------------|----------|--|
| CUY | Cuyaho... | <input type="radio"/> YES <input checked="" type="radio"/> NO | <input type="radio"/> YES <input checked="" type="radio"/> NO | <input checked="" type="radio"/> YES <input type="radio"/> NO | <input type="radio"/> YES <input checked="" type="radio"/> NO | 23500 - Sales Tax | 10.0000% |    Rates |
| D-SF | Delaware local | <input checked="" type="radio"/> YES <input type="radio"/> NO | <input type="radio"/> YES <input checked="" type="radio"/> NO | <input checked="" type="radio"/> YES <input type="radio"/> NO | <input type="radio"/> YES <input checked="" type="radio"/> NO | 23000 - Sales Tax | 2.0000% |    Rates |
| FL | Florida | <input checked="" type="radio"/> YES <input type="radio"/> NO | <input checked="" type="radio"/> YES <input type="radio"/> NO | <input type="radio"/> YES <input checked="" type="radio"/> NO | <input type="radio"/> YES <input checked="" type="radio"/> NO | 23300 - Sales Tax | 8.2500% |    Rates  Link |
| CC | Ceauga | <input checked="" type="radio"/> YES <input type="radio"/> NO | <input checked="" type="radio"/> YES <input type="radio"/> NO | <input type="radio"/> YES <input checked="" type="radio"/> NO | <input type="radio"/> YES <input checked="" type="radio"/> NO | 23300 - Sales Tax | 8.5550% |    Rates  Link |
| Gea | Gea | <input checked="" type="radio"/> YES <input type="radio"/> NO | <input checked="" type="radio"/> YES <input type="radio"/> NO | <input type="radio"/> YES <input checked="" type="radio"/> NO | <input type="radio"/> YES <input checked="" type="radio"/> NO | 25055 - Accrued Revenue | 7.0000% |    Rates  Link |
| HOU | Houston | <input type="radio"/> YES <input checked="" type="radio"/> NO | <input type="radio"/> YES <input checked="" type="radio"/> NO | <input type="radio"/> YES <input checked="" type="radio"/> NO | <input type="radio"/> YES <input checked="" type="radio"/> NO | 23300 - Sales Tax | 3.1300% |    Rates  Link |
| MI | Michigan | <input checked="" type="radio"/> YES <input type="radio"/> NO | <input checked="" type="radio"/> YES <input type="radio"/> NO | <input type="radio"/> YES <input checked="" type="radio"/> NO | <input type="radio"/> YES <input checked="" type="radio"/> NO | 23700 - Sales Tax - Michigan | |    Rates  Link |
| None | No Tax | <input type="radio"/> YES <input checked="" type="radio"/> NO | <input type="radio"/> YES <input checked="" type="radio"/> NO | <input checked="" type="radio"/> YES <input type="radio"/> NO | <input type="radio"/> YES <input checked="" type="radio"/> NO | 23300 - Sales Tax | |    Rates |
| OH | OH-Base | <input checked="" type="radio"/> YES <input type="radio"/> NO | <input checked="" type="radio"/> YES <input type="radio"/> NO | <input checked="" type="radio"/> YES <input type="radio"/> NO | <input checked="" type="radio"/> YES <input type="radio"/> NO | 23300 - Sales Tax | 2.0000% |    Rates |

1 - 19 of 19 items

Refresh

The Rates list opens for the select Sales Tax record. Click on the Add Sales Tax Rate button at the upper left.

Rates: MI - Michigan

+ Add Sales Tax Rate

Export to Excel

☒ YES Show inactive sales tax rates

| Sales ... | Tax Rate Formula | Tax Rate Formula Value | Rate | Start Date | End Date |
|-----------------------|------------------|------------------------|------|------------|----------|
| No records available. | | | | | |

0 - 0 of 0 items

Refresh

The Sales Tax Rate Edit form opens.

In the Tax Rate field, enter the tax rate. In the Start Date field, enter the date this tax rate went into effect. Click the Save button when finished.

Sales Tax Rate Edit

Sales Tax Rate Formula

Flat Rate

Tax Rate Formula Value

0

Tax Rate

6.00

Start Date

1/1/2004

End Date

End Date

Cancel

Save

You are returned to the Rates list. You should see the tax rate appear for your Sales Tax record. Click the Back button at the upper right to return to the Sales Tax listing.

Rates: MI - Michigan

← Back

+ Add Sales Tax Rate

Export to Excel

YES

Show inactive sales tax rates

| Sales ... | Sales Tax Rate Formula | Tax Rate Formula Value | Rate | Start Date | End Date | |
|-----------|------------------------|------------------------|---------|------------|----------|-----------------------|
| MI | Flat Rate | | 6.0000% | 1/1/04 | 12/31/99 | <div>Reactivate</div> |

1 - 1 of 1 items

Refresh

You are returned to the Sales Tax list. You should see the tax rate appear for your Sales Tax record.

Sales Tax

+ Add Sales Tax

Export to Excel

NO

Show base sales taxes only

NO

Show inactive sales taxes

| Tax Code | D... | Recurring | Non-Rec... | Base | Breakout | GL Account | Rate | |
|----------|----------------|----------------|----------------|----------------|----------------|------------------------------|----------|--|
| CUY | Cuyaho... | <div>NO</div> | <div>NO</div> | <div>YES</div> | <div>NO</div> | 23500 - Sales Tax | 10.0000% | <div></div> <div></div> <div>Rates</div> |
| D-SF | Delaware local | <div>YES</div> | <div>NO</div> | <div>YES</div> | <div>NO</div> | 23000 - Sales Tax | 2.0000% | <div></div> <div></div> <div>Rates</div> |
| FL | Florida | <div>YES</div> | <div>YES</div> | <div>NO</div> | <div>NO</div> | 23300 - Sales Tax | 8.2500% | <div></div> <div></div> <div>Rates</div> <div>Link</div> |
| OC | Ceauga | <div>YES</div> | <div>YES</div> | <div>NO</div> | <div>NO</div> | 23300 - Sales Tax | 8.5550% | <div></div> <div></div> <div>Rates</div> <div>Link</div> |
| Cea | Cea | <div>YES</div> | <div>YES</div> | <div>NO</div> | <div>NO</div> | 25055 - Accrued Revenue | 7.0000% | <div></div> <div></div> <div>Rates</div> <div>Link</div> |
| HOU | Houston | <div>NO</div> | <div>NO</div> | <div>NO</div> | <div>NO</div> | 23300 - Sales Tax | 3.1300% | <div></div> <div></div> <div>Rates</div> <div>Link</div> |
| MI | Michigan | <div>YES</div> | <div>YES</div> | <div>NO</div> | <div>NO</div> | 23700 - Sales Tax - Michigan | 6.0000% | <div></div> <div></div> <div>Rates</div> <div>Link</div> |
| None | No Tax | <div>NO</div> | <div>NO</div> | <div>YES</div> | <div>NO</div> | 23300 - Sales Tax | | <div></div> <div></div> <div>Rates</div> |
| OH | OH-Base | <div>YES</div> | <div>YES</div> | <div>YES</div> | <div>YES</div> | 23300 - Sales Tax | 2.0000% | <div></div> <div></div> <div>Rates</div> |

1 - 19 of 19 items

Refresh

Multiple Taxing Jurisdictions — One Sales Tax Record

The process for setting up a single Sales Tax record where multiple taxing jurisdictions are involved, is the same process as described under the topic “Entire State Same Tax Rate”.

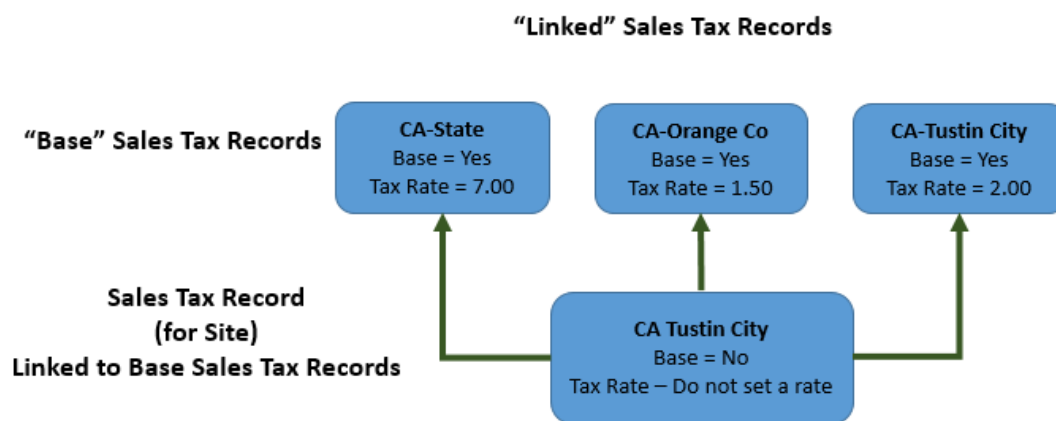
When entering the Tax Rate, you would need to know the combined rate for all jurisdictions.

If any of the rates for any of the jurisdictions changes, you would need to enter a new Tax Rate for the combined amount.

Multiple Taxing Jurisdictions — Multiple Sales Tax Records

Where multiple taxing jurisdictions are involved, this method takes more time to setup, however is easier to maintain when rates change in the future. If your company does business in multiple cities within the same state, if the state tax rate changes, you only need to make the change in one Sales Tax record.

Below is a visualization of how multiple taxing jurisdictions are setup.



Setup the “Base” Sales Tax Records

For each taxing jurisdiction, create one Sales Tax Record. In our example as shown in the visualization on the previous page, we will create three Sales Tax records: one for the state, one for the county, and one for the city.

From the main menu, arrive at the Sales Tax setup with this path: Setup > Accounting > Sales Tax.

The Sales Tax list will be displayed. Setting up a new Sales Tax record is a two-step process. First, create the Sales Tax record, and then setup the tax rate.

Click on the Add Sales Tax button at the upper left of the page.

Sales Tax

[+ Add Sales Tax](#) [Export to Excel](#) NO Show base sales taxes only NO Show inactive sales taxes

| Tax Code | Description | Recurring | Non-Rec... | Base | Breakout | GL Account | Rate | Actions |
|----------|----------------|--------------------------------------|--------------------------------------|--------------------------------------|--------------------------|-------------------------|---------|--|
| Austin | Austin-County | <input type="radio"/> NO | <input type="radio"/> NO | <input checked="" type="radio"/> YES | <input type="radio"/> NO | 23300 - Sales Tax | 0.1300% | Edit Delete Rates |
| D-SF | Delaware local | <input checked="" type="radio"/> YES | <input type="radio"/> NO | <input checked="" type="radio"/> YES | <input type="radio"/> NO | 23000 - Sales Tax | 2.0000% | Edit Delete Rates |
| FL | Florida | <input checked="" type="radio"/> YES | <input checked="" type="radio"/> YES | <input type="radio"/> NO | <input type="radio"/> NO | 23300 - Sales Tax | 8.2500% | Edit Delete Rates Link |
| OC | Geauga | <input checked="" type="radio"/> YES | <input checked="" type="radio"/> YES | <input type="radio"/> NO | <input type="radio"/> NO | 23300 - Sales Tax | 8.5550% | Edit Delete Rates Link |
| Gea | Gea | <input checked="" type="radio"/> YES | <input checked="" type="radio"/> YES | <input type="radio"/> NO | <input type="radio"/> NO | 25055 - Accrued Revenue | 7.0000% | Edit Delete Rates Link |

1 - 18 of 18 items [Refresh](#)

The Sales Tax Edit form opens. Each data entry field is described below.

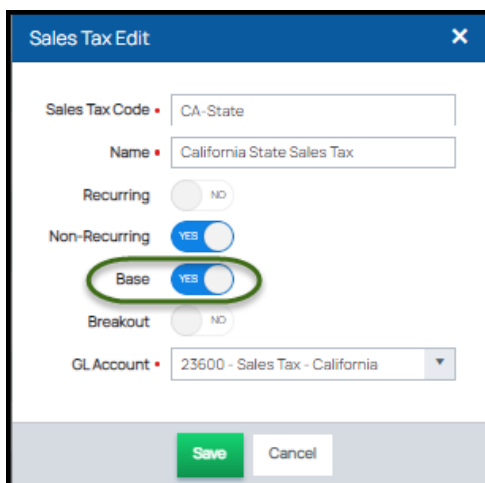
Data entry fields preceded with an asterisk are required.

- ***Sales Tax Code:** Enter a code, maximum of 25 characters.
- ***Name:** Enter a description, maximum of 50 characters.
- **Recurring:** If recurring type services are possibly taxable in this jurisdiction, set the toggle to Yes.

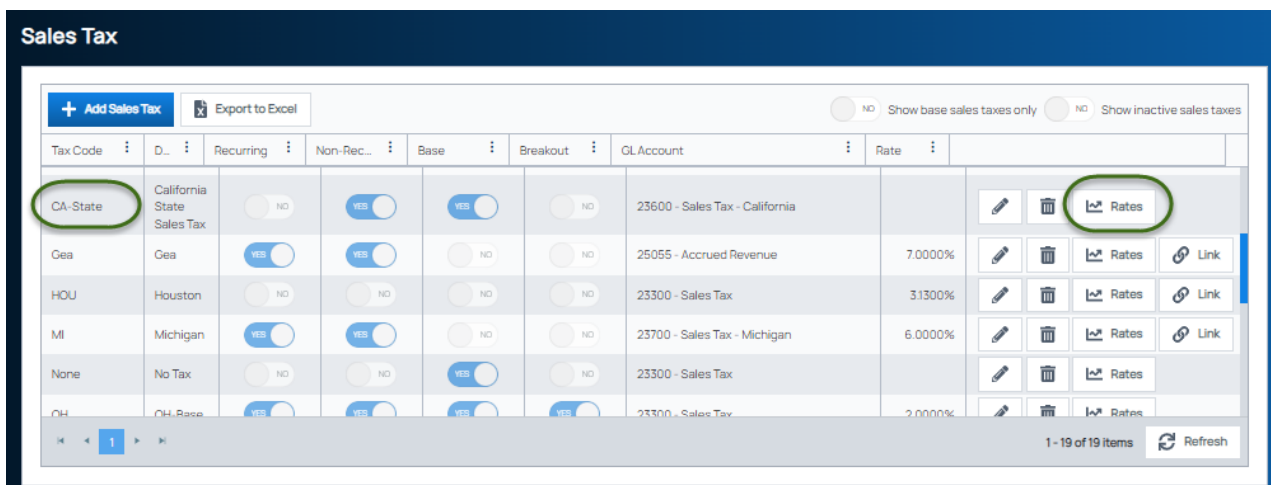
Note: Individual Items and Parts may be flagged as taxable or non-taxable.






















- **Non-Recurring:** If non-recurring type services are possibly taxable in this jurisdiction, set the toggle to Yes.
- **Base:** Set to No. This is only used if you are linking several Sales Tax records together for a combined rate.
- **Breakout:** Set to No. This is only set to Yes if you are linking several Sales Tax records together for a combined rate, and you want to print the amount of tax for each Sales Tax record separately on the customer invoice.
- ***GL Account:** From the drop-down list, select the GL Account to be used as the sales tax liability account.

When finished, click the Save button at the bottom of the form.

A screenshot of the 'Sales Tax Edit' form. It contains several input fields and toggle switches. The 'Sales Tax Code' field is set to 'CA-State'. The 'Name' field is set to 'California State Sales Tax'. The 'Recurring' toggle is set to 'NO'. The 'Non-Recurring' toggle is set to 'YES'. The 'Base' toggle is set to 'YES' and is circled in green. The 'Breakout' toggle is set to 'NO'. The 'GL Account' dropdown is set to '23600 - Sales Tax - California'. At the bottom, there are 'Save' and 'Cancel' buttons.

You are returned to the Sales Tax list. Locate the Sales Tax record just created, and then click the Rates button.

A screenshot of the 'Sales Tax' list. It shows a table with columns: Tax Code, D., Recurring, Non-Rec., Base, Breakout, GL Account, Rate, and a set of action buttons. The first row, 'CA-State', is highlighted, and its 'Rates' button is circled in green. The table has 19 items in total, as indicated by the '1 - 19 of 19 items' text at the bottom right.

| Tax Code | D. | Recurring | Non-Rec. | Base | Breakout | GL Account | Rate | |
|----------|----------------------------|-----------|----------|------|----------|--------------------------------|---------|---|
| CA-State | California State Sales Tax | NO | YES | YES | NO | 23600 - Sales Tax - California | |    |
| Cea | Cea | YES | YES | NO | NO | 25055 - Accrued Revenue | 7.0000% |     |
| HOU | Houston | NO | NO | NO | NO | 23300 - Sales Tax | 3.1300% |     |
| MI | Michigan | YES | YES | NO | NO | 23700 - Sales Tax - Michigan | 6.0000% |     |
| None | No Tax | NO | NO | YES | NO | 23300 - Sales Tax | |    |
| OH | OH-Base | YES | YES | YES | YES | 23300 - Sales Tax | 2.0000% |    |

The Rates list opens for the selected Sales Tax record. Click the Add Sales Tax Rate button at the upper left.

Rates: CA-State - California State Sales Tax [Back](#)

[+ Add Sales Tax Rate](#) [Export to Excel](#) YES ☐ Show inactive sales tax rates

| Sales ... | Tax Rate Formula | Tax Rate Formula Value | Rate | Start Date | End Date |
|-----------------------|------------------|------------------------|------|------------|----------|
| No records available. | | | | | |

0 - 0 of 0 items [Refresh](#)

The Sales Tax Rate Edit form will be displayed.

In the Tax Rate field, enter the tax rate. In the Start Date field, enter the date this tax rate went into effect. Click the Save button when finished.

Sales Tax Rate Edit [X](#)

Sales Tax Rate Formula: Flat Rate

Tax Rate Formula Value: 0

Tax Rate: 7.00

Start Date: 1/1/2022

End Date: End Date

[Cancel](#) [Save](#)

You are returned to the Rates list. You should see the tax rate appear for your Sales Tax record. Click the Back button at the upper right to return to the Sales Tax listing.

Rates: CA-State - California State Sales Tax [Back](#)

[+ Add Sales Tax Rate](#) [Export to Excel](#) YES ☐ Show inactive sales tax rates

| Sales ... | Sales Tax Rate Formula | Tax Rate Formula Value | Rate | Start Date | End Date |
|-----------|------------------------|------------------------|---------|------------|----------|
| CA-State | Flat Rate | | 7.0000% | 1/1/22 | 12/31/99 |

[Reactivate](#)

1 - 1 of 1 items [Refresh](#)

You are returned to the Sales Tax list. You should see the tax rate appear for your Sales Tax record.

Sales Tax

[+ Add Sales Tax](#) [Export to Excel](#) ☐ NO Show base sales taxes only ☐ NO Show inactive sales taxes

| Tax Code | D... | Recurring | Non-Rec... | Base | Breakout | GL Account | Rate | |
|----------|----------------------------|--------------------------------------|--------------------------------------|--------------------------------------|--------------------------------------|--------------------------------|---------|--|
| CA-State | California State Sales Tax | <input type="radio"/> NO | <input checked="" type="radio"/> YES | <input checked="" type="radio"/> YES | <input type="radio"/> NO | 23600 - Sales Tax - California | 7.0000% | |
| Cea | Cea | <input checked="" type="radio"/> YES | <input checked="" type="radio"/> YES | <input type="radio"/> NO | <input type="radio"/> NO | 25055 - Accrued Revenue | 7.0000% | |
| HOU | Houston | <input type="radio"/> NO | <input type="radio"/> NO | <input type="radio"/> NO | <input type="radio"/> NO | 23300 - Sales Tax | 3.1300% | |
| MI | Michigan | <input checked="" type="radio"/> YES | <input checked="" type="radio"/> YES | <input type="radio"/> NO | <input type="radio"/> NO | 23700 - Sales Tax - Michigan | 6.0000% | |
| None | No Tax | <input type="radio"/> NO | <input type="radio"/> NO | <input checked="" type="radio"/> YES | <input type="radio"/> NO | 23300 - Sales Tax | | |
| OH | OH Base | <input checked="" type="radio"/> YES | <input checked="" type="radio"/> YES | <input checked="" type="radio"/> YES | <input checked="" type="radio"/> YES | 23300 - Sales Tax | 2.0000% | |

1 - 19 of 19 items

Follow the same process to create a Sales Tax record for the other taxing jurisdictions. In our example, we have Sales Tax records for CA-State, CA-Orange Co, and CA-Tustin City. If setup correctly, you should not see the Link button on these records.

Sales Tax

[+ Add Sales Tax](#) [Export to Excel](#) ☐ NO Show base sales taxes only ☐ NO Show inactive sales taxes

| Tax Code | D... | Recurring | Non-Rec... | Base | Breakout | GL Account | Rate | |
|----------------|----------------------------|--------------------------------------|--------------------------------------|--------------------------------------|--------------------------|--------------------------------|---------|--|
| CA-Orange CO | CA-Orange County | <input type="radio"/> NO | <input checked="" type="radio"/> YES | <input checked="" type="radio"/> YES | <input type="radio"/> NO | 23600 - Sales Tax - California | 1.5000% | |
| CA-State | California State Sales Tax | <input type="radio"/> NO | <input checked="" type="radio"/> YES | <input checked="" type="radio"/> YES | <input type="radio"/> NO | 23600 - Sales Tax - California | 7.0000% | |
| CA-Tustin City | CA-Tustin City | <input type="radio"/> NO | <input checked="" type="radio"/> YES | <input checked="" type="radio"/> YES | <input type="radio"/> NO | 23600 - Sales Tax - California | 2.0000% | |
| HOU | Houston | <input type="radio"/> NO | <input type="radio"/> NO | <input type="radio"/> NO | <input type="radio"/> NO | 23300 - Sales Tax | 3.1300% | |
| MI | Michigan | <input checked="" type="radio"/> YES | <input checked="" type="radio"/> YES | <input type="radio"/> NO | <input type="radio"/> NO | 23700 - Sales Tax - Michigan | 6.0000% | |

1 - 19 of 19 items

Setup the Sales Tax Record to be Linked to the “Base” Sales Tax Records

For each area that has multiple taxing jurisdictions, create one Sales Tax record and then link to all the pertinent Sales Tax records. The name for the Sales Tax record would be the lowest level taxing jurisdiction, typically the city.

When we setup our “Base” Sales Tax records, we setup the following: CA-State, CA-Orange Co, and CA-Tustin City. We need to create a new Sales Tax record that will be used to assign to our site records for the city of Tustin in California. We cannot use the same Sales Tax code again, so we will setup this new record as CA.

From the main menu, arrive at the Sales Tax setup with this path: Setup > Accounting > Sales Tax.

The Sales Tax list is displayed. Click the Add Sales Tax button at the upper left of the page.

| Sales Tax | | | | | | | | | |
|-----------------|----------------|-----------------|------------|-------------------------------|----------|------------------------------|---------|--|--|
| + Add Sales Tax | | Export to Excel | | NO Show base sales taxes only | | NO Show inactive sales taxes | | | |
| Tax Code | Description | Recurring | Non-Rec... | Base | Breakout | GL Account | Rate | | |
| Austin | Austin-County | NO | NO | YES | NO | 23300 - Sales Tax | 0.1300% | | |
| D-SF | Delaware local | YES | NO | YES | NO | 23000 - Sales Tax | 2.0000% | | |
| FL | Florida | YES | YES | NO | NO | 23300 - Sales Tax | 8.2500% | | |
| OC | Geauga | YES | YES | NO | NO | 23300 - Sales Tax | 8.5550% | | |
| Gea | Gea | YES | YES | NO | NO | 25055 - Accrued Revenue | 7.0000% | | |

The Sales Tax Edit form opens. Each data entry field is described below.

Data entry fields preceded with an asterisk are required.

- ***Sales Tax Code:** Enter a code, maximum of 25 characters.
- ***Name:** Enter a description, maximum of 50 characters.
- **Recurring:** If recurring type services are possibly taxable in this jurisdiction, set the toggle to Yes.

Note: Individual Items and Parts can be flagged as taxable or non-taxable.

- **Non-Recurring:** If non-recurring type services are possibly taxable in this jurisdiction, set the toggle to Yes.
- **Base:** Set to No. This is only used if you are linking several Sales Tax records together for a combined rate.
- **Breakout:** Set to No. This is only set to Yes if you are linking several Sales Tax records together for a combined rate, and you want to print the amount of tax for each Sales Tax record separately on the customer invoice.
- ***GL Account:** From the drop-down list, select the GL Account to be used as the sales tax liability account.

When finished, click the Save button at the bottom of the form.

Sales Tax Edit

Sales Tax Code • CA Tustin

Name • CA Tustin City

Recurring ☐ NO

Non-Recurring ☒ YES

Base ☐ NO

Breakout ☐ NO

GL Account • 23600 - Sales Tax - California

Save Cancel

You are returned to the Sales Tax list. Locate the Sales Tax record just created, and then click the Link button.

| Sales Tax | | | | | | | | | |
|---------------------------------|----------------------------|--------------------------------------|--------------------------------------|--|--------------------------|--------------------------------|---------|----------------------|------------------------|
| + Add Sales Tax | | Export to Excel | | <input type="radio"/> NO Show base sales taxes only <input type="radio"/> NO Show inactive sales taxes | | | | | |
| Tax Code | D... | Recurring | Non-Rec... | Base | Breakout | GL Account | Rate | | |
| Austin | Austin-County | <input type="radio"/> NO | <input type="radio"/> NO | <input checked="" type="radio"/> YES | <input type="radio"/> NO | 23300 - Sales Tax | 0.1300% | Edit | Delete |
| CA Tustin | CA Tustin City | <input type="radio"/> NO | <input checked="" type="radio"/> YES | <input type="radio"/> NO | <input type="radio"/> NO | 23600 - Sales Tax - California | | Edit | Delete |
| CA-Orange CO | CA-Orange County | <input type="radio"/> NO | <input checked="" type="radio"/> YES | <input checked="" type="radio"/> YES | <input type="radio"/> NO | 23600 - Sales Tax - California | 1.5000% | Edit | Delete |
| CA-State | California State Sales Tax | <input type="radio"/> NO | <input checked="" type="radio"/> YES | <input checked="" type="radio"/> YES | <input type="radio"/> NO | 23600 - Sales Tax - California | 7.0000% | Edit | Delete |
| CA-Tustin City | CA-Tustin City | <input type="radio"/> NO | <input checked="" type="radio"/> YES | <input checked="" type="radio"/> YES | <input type="radio"/> NO | 23600 - Sales Tax - California | 2.0000% | Edit | Delete |
| OC | Geauga | <input checked="" type="radio"/> YES | <input checked="" type="radio"/> YES | <input type="radio"/> NO | <input type="radio"/> NO | 23300 - Sales Tax | 8.5550% | Edit | Delete |
| Gea | Gea | <input checked="" type="radio"/> YES | <input checked="" type="radio"/> YES | <input type="radio"/> NO | <input type="radio"/> NO | 25055 - Accrued Revenue | 7.0000% | Edit | Delete |

The Link Base Sales Tax form opens. Click in the white box, which provides a list of Sales Tax records. Click on the first Sales Tax record to link.

Click in the white box again, and select the next Sales Tax record to link. Repeat the process until all Sales Tax records needed are linked, and then click the Save button at the bottom of the form.

Link Base Sales Tax

- Austin-County
- CA-Orange County
- California State Sales Tax
- CA-Tustin City
- Conv
- Cuyahoga
- Delaware local

Link Base Sales Tax

Cancel

Save

Link Base Sales Tax

- Austin-County
- CA-Orange County
- California State Sales Tax
- CA-Tustin City
- Conv
- Cuyahoga
- Delaware local

Link Base Sales Tax

Cancel

Save

Link Base Sales Tax

- Austin-County
- CA-Orange County
- California State Sales Tax
- CA-Tustin City
- Conv
- Cuyahoga
- Delaware local

Link Base Sales Tax

Cancel

Save

You are returned to the Sales Tax list. Locate the Sales Tax record on which you performed the link, and in the Rate column, you should see the combined tax rate of all the Sales Tax records that were linked.

| Sales Tax | | | | | | | | | |
|---------------------------------|----------------------------|--------------------------------------|--------------------------------------|--|--------------------------|---|--------------------|---------|--|
| + Add Sales Tax | | Export to Excel | | <input type="checkbox"/> NO Show base sales taxes only | | <input type="checkbox"/> NO Show inactive sales taxes | | | |
| Tax Code | D... | Recurring | Non-Rec... | Base | Breakout | GL Account | Rate | | |
| Austin | Austin-County | <input type="radio"/> NO | <input type="radio"/> NO | <input checked="" type="radio"/> YES | <input type="radio"/> NO | 23300 - Sales Tax | 0.1300% | | |
| CA Tustin | CA Tustin City | <input type="radio"/> NO | <input checked="" type="radio"/> YES | <input type="radio"/> NO | <input type="radio"/> NO | 23600 - Sales Tax - California | 10.5000% | | |
| CA-Orange CO | CA-Orange County | <input type="radio"/> NO | <input checked="" type="radio"/> YES | <input checked="" type="radio"/> YES | <input type="radio"/> NO | 23600 - Sales Tax - California | 1.5000% | | |
| CA-State | California State Sales Tax | <input type="radio"/> NO | <input checked="" type="radio"/> YES | <input checked="" type="radio"/> YES | <input type="radio"/> NO | 23600 - Sales Tax - California | 7.0000% | | |
| CA-Tustin City | CA-Tustin City | <input type="radio"/> NO | <input checked="" type="radio"/> YES | <input checked="" type="radio"/> YES | <input type="radio"/> NO | 23600 - Sales Tax - California | 2.0000% | | |
| GC | Geauga | <input checked="" type="radio"/> YES | <input checked="" type="radio"/> YES | <input type="radio"/> NO | <input type="radio"/> NO | 23300 - Sales Tax | 8.5550% | | |
| Gea | Gea | <input checked="" type="radio"/> YES | <input checked="" type="radio"/> YES | <input type="radio"/> NO | <input type="radio"/> NO | 25055 - Accrued Revenue | 7.0000% | | |
| 1 | | | | | | | 1 - 19 of 19 items | Refresh | |