Sales Tax Rate Change

Last Modified on 05/23/2025 4:10 pm EDT

When your company receives notification that a new tax rate will go into effect as of certain date, add a new Tax Rate record with a start date provided to you by the taxing jurisdiction. Follow the instructions below.

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

The Sales Tax list opens. Locate the Sales Tax record for which you need to enter a new tax rate, and then click the Rates button.

+ Add Sales Tax 🕅 Export to Excel												
Tax Code	D i	Recurring	Non-Rec	Base :	Breakout :	GLAccount	÷	Rate :				
CA-State	California State Sales Tax	ND	155	155	ND	23600 - Sales Tax - California			ø	ā (Rates	
Gea	Gea	YES	YES	ND	ND	25055 - Accrued Revenue		7.0000%	ø	Ô	Mates	Ø Link
HOU	Houston	ND	NO	ON D		23300 - Sales Tax		3.1300%	ø	亩	<u>I≁</u> Rates	🔗 Lini
м	Michigan	YES	YES	ND	ND	23700 - Sales Tax - Michigan		6.0000%	ø	亩	🛃 Rates	Ø Link
None	No Tax	ND	ND	YES	ND	23300 - Sales Tax			1	亩	Mates	
	OLL Dana					07700 0 J		0.000000		÷	La B. Datas	

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

Rates: CA-State - California State Sales Tax									
+ Add Sales Tax Rate 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	5/31/22	C Reactivate			
н 4 1	н					1-2 of 2 items	C 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 will go into effect. Click the Save button when finished.

Sales Tax Rate Ec	lit			×
Sales Tax Rate			-	
Formula	Flat Rate		÷	
Tax Rate Formula Value			×	
Tax Rate		7.25	*	
Start Date	6/1/2022		Ħ	
End Date	End Date		Ħ	
	Cancel Save			

You are returned to the Rates list. You should see a new row in the grid with the new tax rate and start date for your Sales Tax record. For the original Sales Tax Rate record, the software automatically will set the End Date to one day before the new rate goes into effect.

Click the Back button at the upper right to return to the Sales Tax listing.

Rates: CA-State - California State Sales Tax										
+ Add Sales Tax Rate 🚯 Export to Excel										
Sales	Sales Tax Rate Formula	Tax Rate Formula Value	Rate :	Start Date :	End Date :					
CA-State	Flat Rate		7.0000%	1/1/22	5/31/22	3 Reactivate				
CA-State	Flat Rate		7.2500%	6/1/22	12/31/99	D Reactivate				
H 4 1	⊁ Н					1-2 of 2 items CRefresh				