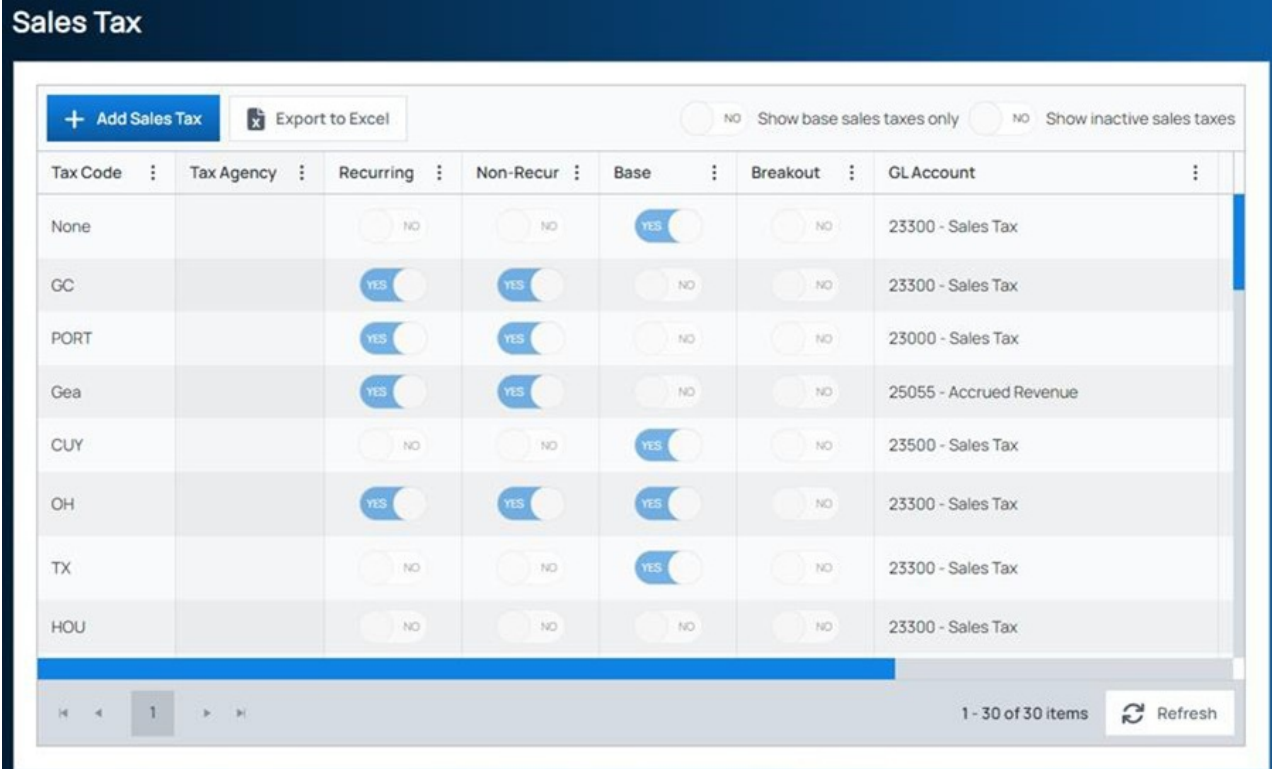


Tax Agencies as Vendors (Pro)

Last Modified on 02/19/2025 7:11 pm EST

Tax agencies as vendors adds visibility and tracking.

On the Sales Tax page (Setup > Accounting > Sales Tax), there is a new column in the grid called Tax Agency.



The screenshot shows the 'Sales Tax' configuration page. At the top, there are buttons for '+ Add Sales Tax' and 'Export to Excel'. Below these are two toggle switches: 'Show base sales taxes only' (set to NO) and 'Show inactive sales taxes' (set to NO). The main part of the page is a table with the following columns: Tax Code, Tax Agency, Recurring, Non-Recur, Base, Breakout, and GL Account. The table contains eight rows of data.

Tax Code	Tax Agency	Recurring	Non-Recur	Base	Breakout	GL Account
None		NO	NO	YES	NO	23300 - Sales Tax
GC		YES	YES	NO	NO	23300 - Sales Tax
PORT		YES	YES	NO	NO	23000 - Sales Tax
Gea		YES	YES	NO	NO	25055 - Accrued Revenue
CUY		NO	NO	YES	NO	23500 - Sales Tax
OH		YES	YES	YES	NO	23300 - Sales Tax
TX		NO	NO	YES	NO	23300 - Sales Tax
HOU		NO	NO	NO	NO	23300 - Sales Tax

At the bottom of the table, there is a pagination control showing '1' and a 'Refresh' button.

When adding a sales tax, there is a new field called Tax Agency.

Add Sales Tax [X]

Sales Tax Code • Sales Tax Code

Description • Description

Tax Agency [dropdown]

Recurring NO

Non-Recurring NO

Base NO

Breakout NO

GL Account • [dropdown]

[Save] [Cancel]

Click this field to see all vendors that have been flagged as Tax Agencies. If no vendors have been flagged as tax agencies, this field is empty.

To set a vendor as a tax agency:

1. Create a new vendor or open an existing one
2. Click the Tax Agency switch to Yes.

New Vendor [Create] [Cancel]

Vendor Number • 3012

Name • Name

Payable To Payable To

Memo Memo

Mailing Address Address 1
Address 2
City [dropdown] Zip Code Plus 4

GL Account • [dropdown]

1099 Eligible? NO

Tax Agency NO

Primary Phone () - - Ext

Other Phone () - - Ext

Fax Number () - -

Email Email

Customer Number Customer Number

Web Page Web Page

Term •

Taxpayer ID Number Taxpayer ID Number

Remittance Address Address 1
Address 2
City [dropdown] Zip Code

Sales Phone () - - Ext

Sales Email Sales Email

Support Phone () - - Ext

Support Email Support Email

Comments