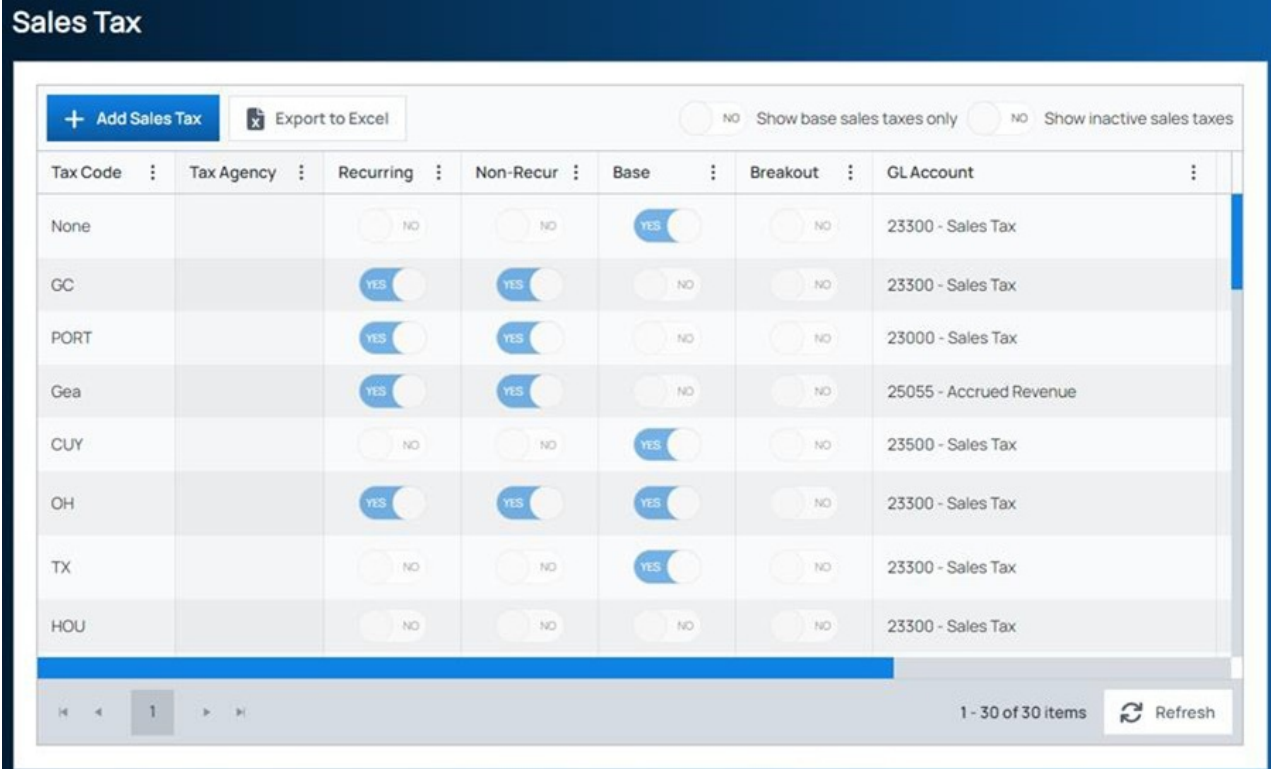


Tax Agencies as Vendors (Pro)

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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 filters: 'Show base sales taxes only' and 'Show inactive sales taxes', both currently 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, each representing a different tax code and its associated settings.

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 • [dropdown]

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