

COMPANY

COMPANY - SETTING UP TAX RATES

Tax rates need to be set up so that you can add tax to items e.g. **15%** VAT on stock sold.

Ribbon Access: Configurator > Company > Company



Setting up Tax Rates



- The *Company Maintenance* screen will be displayed.
- Click on the *Configuration* tab.

Help v2.5.1.4 - Pg 2 - Printed: 27/06/2024



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- You can now view the *Tax Rates* frame.
- Right click anywhere in a row of the Tax Rates data grid.



- A *Maintain* menu will pop up.
- Click on *Add* Add New Tax Rate.





- The final row in the data grid will be 'activated'.
- The *Tax Type*, *Tax Type Description*, *Rate* and *Default* columns will now be populated.





- Click in the *Code* text box to reveal an *ellipsis* button.
- Click on this button to display the *Select a tax code* pop up screen.
- Click on the *row selector* in front of the *tax code* that you wish to *link* to this company.
- Click on *Ok*.



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• The *Code* and *Tax Code Desc* columns will now populate with the selected code details.



 Click in the *Rate* text box and either type in or use the directional arrows to select the tax rate (*percentage* value).





- Click in the *Default* text box to reveal a drop-down menu.
 - Click on **Yes** if the Tax Rate is to be used by default.
 - Click on *No* if the Tax Rate is <u>not</u> to be used by default.



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• Click in the *Account System Code* text box and type in an *account system code* for this new tax rate.



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• When you have finished adding the new tax rate details, press *Enter*.



- Note: The *Amend Date* column will be adjusted by the system.
- The new tax rate code will be *saved* and a *new row* will be added the *Tax Rates* data grid.
- Click on Save .



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Check Credit Terms	Yes										
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