
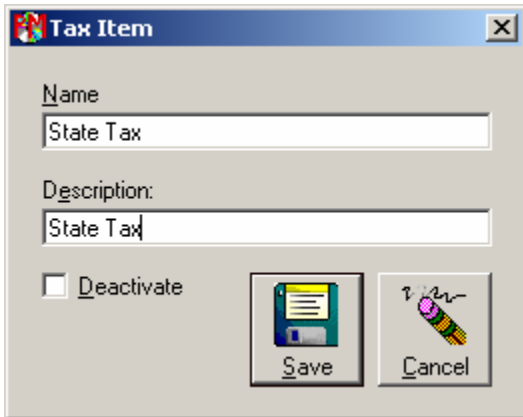


Click the “new” icon . You will see the following screen.



Enter the name of the tax item and a description, and click “Save”. You will now see the tax item in the list.

Now, from the menu, select “Lists”, then “Taxation”, then “Taxes”. You will see the following screen.

Assigning Taxes

Tax Item Add Edit

State Tax

No Tax Item

State Tax

Equipment

Tax Amount

0

Labor

Line Items

Deactivate

Save

Cancel

Now, choose either “Amount” or “Percent” from the Type dropdown box depending on whether you want to use a flat amount or a percentage.

Enter the Tax Amount. If you chose to use a percentage, enter the percentage amount (don't enter a % sign). If you chose to use a flat amount, enter that amount (don't enter a \$ sign)

Now, choose the invoice items that you want this tax to be applied to by checking the appropriate boxes.

Assigning Taxes

Tax Item Add Edit

State Tax

Type

Percent

9.00

Equipment

Labor

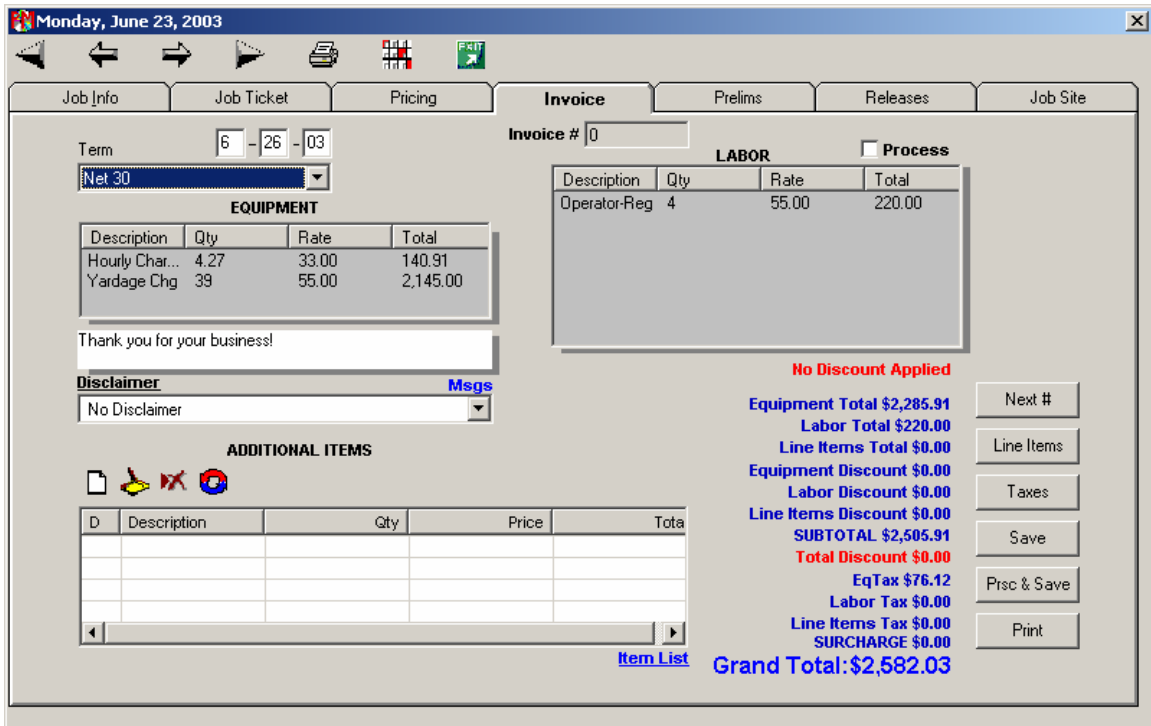
Line Items

Deactivate

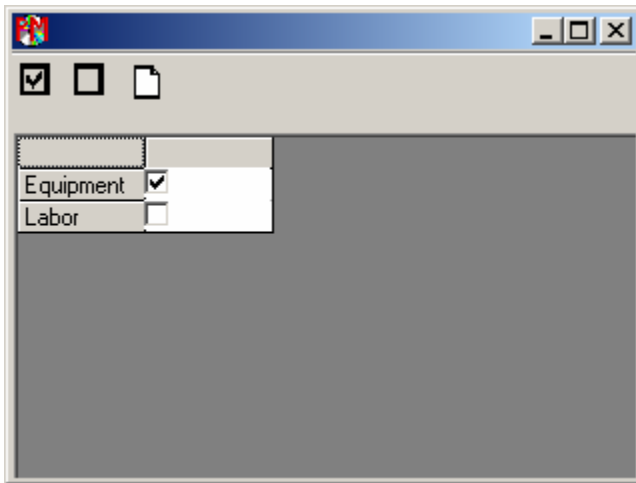
Save

Cancel

Click the “Save” button when done. You will now see this tax item in the list.



You will see the following screen:



(If you have already set up automatic tax items for this state, as we did at the beginning of this document, you will see that item listed already. To add another item, click the “New” icon in the toolbar. You will see this:

Assigning Taxes

Tax Item Add Edit

No Tax Item

Type Equipment

Percent Labor

Tax Amount Line Items

0

Deactivate

Save

Cancel

If you don't already have the item that you want to apply listed in the Tax Item dropdown list, simply click the **Add** link above the dropdown. Doing so will let you add the name of a new Tax Item.

Once you have done that, choose the Type and enter a Tax Amount, as well as whether it will apply to Equipment, Labor, and/or Line Items. Click "Save" when done.

Assigning Taxes

Tax Item Add Edit

Other

Type Equipment

Percent Labor

Tax Amount Line Items

5

Deactivate

Save

Cancel

You will now see your new item listed

	Equipment	Labor	Other
	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Equipment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Labor	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Close the window to have the tax applied to the invoice. You can ensure that it was applied by checking the tax amount on the invoice view:

EqTax \$0.00
Labor Tax \$11.00
Line Items Tax \$0.00
SURCHARGE \$0.00