SedonaSetup - AR - Tax Groups

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A Tax Group is linked to one or more Tax Tables and is assigned to a Customer's Site. By default, the tax-ability of items invoiced is **determined by the Tax Group assigned to the Site record**. The Tax Group defaulting into an Invoice or Credit Memo may be overridden on an individual basis if necessary.

There a four separate setup forms [tabs] in the Tax Group setup, each of which will be described below.

Taxes Tab

First create the Taxing Group; enter up to 25 characters into the Taxing Group field, then press the tab key on your keyboard to move to the Description field. The Description will auto-fill with the same information entered into the Taxing Group field; you may modify this if desired.

Next link the appropriate Tax Table codes to the Taxing Group by checking the box to the left of each Tax Code (tax table) in the lower tier of the form. When finished, click the Apply button to save. Repeat these steps until all Tax Groups needed have been created.

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US Geo Linking Tab

Using the US Geo Linking is optional however, it makes the chore of selecting the correct Tax Group for a Site effortless. There is a bit of setup involved, but once put in place, the User should not have to make a decision of which Tax Group to select when setting up a new Site.

The Tax Group Geo Linking form is designed to link a Tax Group to a method of how sales tax is determined and reported for the jurisdiction; this is referred to as the Geo Taxing Level.

Depending on the Geo Taxing Level assigned to each State in the Geographic setup table (State), fields will be displayed on the US Geo Linking form to validate information which is used to default the appropriate Tax Group when creating a Site. There are eight pre-defined Geo Taxing Levels from which you would select; these are:

- None
- State
- Postal Code Only
- County Only
- City Only
- County + Postal Code
- City + Postal Code
- City + County

When a new Site is created, depending Geo Taxing Level, once the Site Address information has been entered, the application will attempt to fill in the appropriate Tax Group and Cycle Tax Group into the Site setup form. If the application does not find a Tax Group with the matching criteria from the Site Address information, the Tax Groups will default to the company's default Tax Group (SedonaSetup/Data Entry Defaults CM).

Continue on for a sample scenario of how all these elements are setup and linked together.

The following is a sample of how to use the Tax Group Geo Linking.
We will be working with the state of California.

California requires that sales tax is reported by County and each City within a given County. Since the lowest level of reporting is the City, this is how we should setup our Tax Groups.

After the Tax Group(s) have been setup, we need to assign a Geo Taxing Level on the State setup.

State Setup
Within SedonaSetup, navigate to the Geographic Tables option, then click on the United States at the bottom of the list of countries.

A tree of five options will be displayed; click on the State option. Next click on the letter corresponding to the first letter of the State you want to work with. In the example below we clicked on the letter C, which now displays a list of all States that begin with the letter C; we will select California from the list.

In the lower tier of the form select the GEO Sales Tax Level from the drop-down list; we will be selecting City + County. Click the Apply button when finished.

County Setup
Since California requires reporting of tax at the County and City level, we need to make certain all the Counties within California where we do business are entered into the County setup table.

From the Geographic Tables tree, select the Counties option.

Tax Group Setup
Now we will link the Tax Group to the same Geo Taxing Level as was selected for the State [in the Geographic setup table].

On the US Geo Linking tab, we will select the Geo Taxing Level of City + County option.

This will open two new fields; County and City.

We will make selections in the County and City fields that correspond to our Tax Group. In this case, the County is Orange and the City is Rancho Santa Margarita.

Click the Apply button when finished.

Below we will see how this setup affects the populating of the Tax Group fields on the Site setup form.

When creating a new Customer or new Site for an existing Customer, the Site address auto-fills with the primary billing address of the Customer. If you need to change the address, make the necessary changes and if the GEO Taxing Level includes the County, you will need to make the correct selection from the drop-down list in the County field.

Once the Save button is clicked on the Edit Address form, if the software finds a Tax Group that matches the City and

County combination within the State of the Site, the appropriate Tax Group will fill into the Tax Group and Cycle Tax Group fields.

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Group Rate Setup Tab
This form is used by one specific SedonaOffice customer; do not use this option unless you have been instructed to do so by your SedonaOffice Trainer or a SedonaOffice Support Representative.

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Product Lines Tab
This form would only be used if you want to use a specific Invoice Item for a specific Part Product Line when invoicing a Customer for Inventory Parts; this would be for any type of Invoice - Miscellaneous, Job, or Service.
Before setting up any information in this form, consult with a SedonaOffice Support Representative to discuss the ramifications of using this option.
To use this feature:

1. Click on the New button at the lower right of the Product Lines form.

2. Select a Product Line from the drop-down list.

3. Select the Invoice Item to be used from the drop-down list.

4. Type in a Description; text entered into this field will only print on one particular custom invoice.

5. Click the Apply button when finished.

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