How to Add Tax Groups with Multiple Tables

Last Modified on 11/05/2024 5:43 pm EST

There are many states that have multiple levels of taxes that can be charged for sales tax. Different items could be taxed differently depending on what the item is. For example: phone service may not be taxed but someone coming on site to give service will be taxed.

To make sure the correct taxes are being charged, the steps below will show the multiple steps on how to add an example tax group that has State, County, City and Other Authority that will need taxes assigned. The steps below assume the user will have the correct permissions to preform them.

** ALWAYS verify the correct amounts with a reliable source as SedonaOffice does not update the data automatically

1. Find the information needed to add all the correct taxes for the local to be added, in our example the total taxes between the different levels will be 8.2%

Colorado Springs sales tax range for 8.2%	r 2024
Colorado	2.9%
<u>El Paso County</u>	1.23%
Colorado Springs	3.07%
Pikes Peak Rta	1.0%
Total rate range	8.2%

Since there are multiple tax levels, each one will need to be entered separately

2. Log into SedonaSetup - Click on Tax Tables AR - Click on New

Invoice Groups	AR	and the second second	r. 201 (0)			
Invoice Items	AR	Tax Table		Item Types	Date Of Service	^
Item Types	AR				Inventory Part-Jobs	
Late Fee Rules	AR	Description			Inventory Part-Service	
Setup Processing	AR				D IPS-PST	
Statement Rules	AR	Account			Labor-Jobs	
Tax Groups	AR				Labor-Service	
Tax Tables	AR				LBS-PST	
remis	AK	Tax Agency			Materials-Service	
Cancellation Profiles	CM				Non-Inventory Part	
Cancellation Tasks	CM		Allow Line Item Evernation		Non-Recurring	
Chain Accounts	CM		Elon cilo terri cicriptori		[]	× 1
Collection Statuses	CM				<	>
Custom Fields Setup(Customer)	CM					
Custom Fields Setup(Site)	CM				Apply <u>N</u> ew	Delete
Custom Fields Setup(System)	CM v					

3. Enter each Tax Level as its own table as shown below - Check off each item type that tax will be used

	GST Tax			∏ Inact
Tax Table Description Account Tax Agency	CO-State CO-State 250112 Sales Tax Payable-Colorado CODR	Item Types	Date Of Service Inventory Part-Jobs Inventory Part-Service IPS-PST Labor-Jobs Labor-Service LBS-PST Materials-Service Non-Inventory Part	
	Allow Line Item Exemption	ā	Non-Recurring	

4. Click on Effective Dates & Formula Tab – Click on New – Enter the Effective Date (*use 01/01/2024 or the correct start date of the rate*) – Enter the Rate for that tax – Select the correct Formula Type from drop down – No end date will keep the tax rate until a new one is entered – click on Apply to set the rate – Click Apply again to save the full record

Ta <u>x</u> Table Setup	Effective I	Dates & Formula	CO-	-State - CO-State	1
Effective Date	Tax Rate	End Date	Formula Type	Formula Amt	
1/1/2024	2.9000	** Never **	Flat Rate		1
Effective Date	1/1/2024		<u>R</u> ate	2.9000	
End Date			Form <u>u</u> la Type	Flat Rate	
			Formula <u>A</u> mount	Apply New Delete	
				<u>Apply New Delete</u>	

5. After all Tax Table rates have been entered should see then in the Tax Table list

Criteroloc county	criterende county	1,0000	orreomptioner	
CO-Colorado Springs	CO-Colorado Springs	3.0700	CODR	N
CO-El Paso County	CO-El Paso County	1.2300	CODR	N
CO-Pikes Peak Rta	CO-Pikes Peak Rta	1.0000	CODR	N
CO-State	CO-State	2.9000	CODR	N

6. Will need to enter the Tax Group for the Tax Tables just entered - Click on Tax Groups AR in SedonaSetup - Click on New

Danks	AR					
Check 21 Setup	AR		Taxes US Geo Linking Group	Rate Setup Product Lines		
Credit Reason	AR					
EFT Credit Card Types	AR					Inactive
EFT Setup	AR		Taxing Group			
GL Account Defaults	AR					
Invoice Descriptions	AR		Description			
Invoice Groups	AR					
Invoice Items	AR		Tax Code	Description	Rate	
Item Types	AR					
Late Fee Rules	AR					
Setup Processing	AR					
Statement Rules	AR					
Tax Groups	AR					
Tax Tables	AR					
Terms	AR					
Cancellation Profiles	CM					
Cancellation Tasks	CM					
Chain Accounts	CM		,			
Collection Statuses	CM					
Custom Fields Setup(Customer)	CM	-			_	
Custom Fields Setup(Site)	CM				Apply N	ew Delete
Custom Fields Setup(System)	CM v					

7. In the Taxes Tab – Enter the Taxing Group Name (*If there are different taxing entities for the same area, depending on the zip code, each will need to be added and should be named as such*) – Select the Tax Codes for that group to be used – The remaining tabs can be used if needed – Click on Apply once all tabs and data filled in as needed

Tax Group	Description	Group Rate	Inactive	1
000 Club	5000 Club	N	N	
CTAX	BCTAX	N	N	
fanitou Default	Manitou Default	N	N	
I-Exempt	MI-Exempt	N	N	
II-Oakland County	MI-Oakland County	N	N	
II-Tax Exempt	MI-Tax Exempt	N	N	
Taxes US Geo Linking Taxing <u>G</u> roup Description	g <u>G</u> roup Rate Setup Product Lines CO-Colorado Spings-PikesP CO-Colorado Spings-PikesPeakRtz	1		∏ jnac
Taxes US Geo Linking Taxing <u>G</u> roup Desc <u>r</u> iption	g Group Rate Setup Product Lines CO-Colorado Spings-PikesP CO-Colorado Spings-PikesPeakRite	1		∏ jnac
Taxes US Geo Linking Taxing <u>G</u> roup Description	group Rate Setup Product Lines CO-Colorado Spings-PikesP CO-Colorado Spings-PikesPeakRtz Description Description	 Ri	ate	∏ Inac
Taxes US Geo Linking Taxing Group Description	g group Rate Setup Product Lines [CO-Colorado Spings-PikesP [CO-Colorado Spings-PikesPeakRtz Description 1st 5000	 	ste	∏ Inac
Taxes US Geo Linking Taxing Group Description	group Rate Setup Product Lines CO-Colorado Spings-PikesP CO-Colorado Spings-PikesPeakRtz Description st 5000 C-Colorado State	 	ate 25	∏ Inac
Taxing Group Description	g group Rate Setup Product Lines [CO-Colorado Spings-PikesP [CO-Colorado Spings-PikesPeakRz] Description 185 5000 CA-Colforna State CA-Riverside County	 	ate 25 5	∏ Inac
Taxes US Geo Linking Taxing Group Description Tax Code Ist 5000 CA-California State CA Riverside Count Concordo Spring Concordo Spring	g group Rate Setup Product Lines CO-Colorado Spings-PikesP CO-Colorado Spings-PikesPeakRiz Description 1 Discription CA-Calorado Spings-PikesPeakRiz Co-Colorado Spings-PikesPeakRiz Co-Colorado Spings-PikesPeakRiz Co-Colorado Spings-PikesPeakRiz Co-Colorado Spings-PikesPeakRiz Co-Colorado Spings-PikesPeakRiz V Co-Colorado Spings-PikesPeakRiz	R. 7 6. 1. 3.	ate	∏ Inac
Taxes US Geo Linking Taxing Group Description Tax Code Ist 5000 CA-California State CA-Riverside Count V Do-Colorado Spring V Do-CH Paso County	g group Rate Setup Product Lines CO-Colorado Spings-PikesP CO-Colorado Spings-PikesPealRitz Description 1st 5000 CC-Calforna State y CC-Reversed County s CO-Colorado Spings-PikesPealRitz	R R 7 6. 1. 3. 1.	ate 25 5 07 23	□ Jnac
Taxes US Geo Linking Taxing Group Description Tax Code Ist 5000 CA-Calfornis State CA-Riverside Count V DO Colorado Spring O O-Pikes Peak Rta	g group Rate Setup Product Lines CO-Colorado Spings-PikesP CO-Colorado Spings-PikesPeakRitz I Description 1 Description y CA-Calforna State Y CA-Revende Contry y CA-Revende Contry y CA-Revende Contry y CA-Revende Contry y CO-Colorado Spings y CA-Revende Contry y CO-Revende Reventy	Ru 7 7 6 1 1 3 3 1 1	ste 25 5 07 23	∏ jnac
Taxing Group Description Tax Code CARVerside County CARVerside County CARVerside County COCOR Plane County COCOR Plane County COCOR County COCOR County COCOR County	g group Rate Setup Product Lines CO-Colorado Spings-PikesP CO-Colorado Spings-PikesPeal/Rit Description is 5000 CA-calfornia State y CA-Riverside County CO-Olorado Springs CO-Olorado Springs	Real Real Real Real Real Real Real Real	ate 25 5 07 23 9	∏ Jnac

Once the Tax Group is added, can click on the new Tax Group and see all Tax Codes selected: **Total Rate for this Tax Group = 8.2%**

Taxing Group CO-Co	lorado Spings-PikesP		Inactiv
Description CO-Co	lorado Spings-PikesPeakRta		
Tax Code	Description	Rate	· ·
CO-Colorado Springs	CO-Colorado Springs	3.07	
CO-El Paso County	CO-El Paso County	1.23	
CO-Pikes Peak Rta	CO-Pikes Peak Rta	1	
CO-State	CO-State	2.9	
L 1st 5000	1st 5000	7	
CA-California State	CA-California State	6.25	
CA-Riverside County	CA-Riverside County	1.5	
GST	GST	8	
MI 6%	MI 6%	6	

8. The new Tax Group can now be used on the Customer/Site as needed as shown below

one mainle anu A	Residential Commercial	Branch	СО		•
Site Number	2 - Mountain Home	Cross Street			-
Site Name	Jacobs, Darren	Map Code			_
Add'l Name		Customer Since	10/28/20	24	
<u>A</u> ddress	5500 Mountain Road Pikes Peak, CO 80910	Monitored By / CS Integration	<not inf<="" td=""><td>tegrated></td><td></td></not>	tegrated>	
Phone 1		Tax Information			
Phone 2		Tax Group	-Colorado	Spings-PikesP	
Eax	Copy Site Address to Billing	CO-Colorado Sp CO-El Paso Cour CO-Pikes Peak R	rings nty Ita	3.07% 1.23% 1.0%	< >
Comments		Cycle Tax Group	-Colorado	Spings-PikesP	
		CO-Colorado Sp	rings	3.07%	^
		CO-El Paso Cour CO-Pikes Peak R	nty Ita	1.23%	~
		Tay Exempt #			_