**Open Systems**

**Sales Tax/Tax Groups**

Go to **Resource Manager**

Go to **Sales Tax Reporting**.

**Tax Classes**-A to append, enter 00 and enter the word ALL unless you have to charge tax then enter 00 as non-taxable and 01 as taxable.

**Tax Locations**-Enter the state ID and the states name.

**Tax level** is 1.

**Tax** ID-Enter the tax identification number.

**Authority** is again the state ID (ie: CA).

**Tax on Freight, Misc**, answer Yes or No for

**Tax Liability** Acct-Enter the GL account for the tax liability and refund.

**Page down**.

Hit enter at Taxable and enter the sales tax percent, the purchase tax percent (if needed), the refundable percent (if needed), and the Expense Acct (if needed).

The other fields are updated from postings from AR/SO and AP/PO.

Page down or ok.

**Tax Groups**. A to append and enter the state ID (ie: DE) and name. Each state can be entered even if sales tax is not charged. Reports by state can be produced for states entered.

**Reporting Method**- S to print a breakdown of the taxes calculated for each location on AR invoices or C for printing a combined total only.

**Tax Levels – One - Five** Enter the state (CA)) in level 1.

In AR, File Maintenance, Customers, General Information, the Tax Group is set up and Taxable (YES/NO). This determines the sales tax percent each customer is charged. If you are billing a customer but shipping to another location then the ship to location tax group is charged.