

Web Link Help File: Sales Tax Management

Abstract

> This help file will illustrate how to setup tax rates by state, zip code and customer account number.

Procedure

- 1) Sign into the site as website administrator user.
- 2) To access the Sales Tax Management page, select "tax setup" from the Tax and Shipment Management menu. (fig. 1)
- To begin assigning sales tax rates for each state in the table listing, select the store location from the "Locations" drop down box. Each store location can have its own set of sales tax rate assignments. (fig 2)



Sales Tax Use this page for different I information.	Managemen to add tax rates fro ocations ,if the stat	t or differ te inform	rent states of US.Ya mation varies for a	ou can se state tha	lect the lo n click or	ocation from the	e drop down below to assign button close to it and fill the	_{tax} fig.2
Locations	Warehouse	-	Import from De	fault Su	persede	d Tax		
	Default Auto Eagle Sales MRS Test Location 1 MRS Test Location 2		Tax(%)			Save	l .	
F			0.00]	Save	Exceptions		
	Test Location12		0.00]	Save	Exceptions		
	Alberta		0.00]	Save	Exceptions	•	
	Arizona		0.00]	Save	Exceptions		
A	Arkansas		0.00]	Save	Exceptions	1	
Britis	British Columbia		0.00]	Save	Exceptions		
C	California		0.00]	Save	Exceptions		
c	Colorado		0.00]	Save	Exceptions		
Co	Connecticut		0.00]	Save	Exceptions		
D	elaware		0.00]	Save	Exceptions		

- 4) Fill in the appropriate tax rates in the Tax (%) field for each state in the table and click the "Save" button to the right of each field. (fig.3)
- 5) Clicking on the "Exceptions" button will open up a pop up window which will allow the administrator to enter rates for zip codes and/or zip code ranges that differ from the rate applied to the state. (fig.4)

Sales Tax Managemen Use this page to add tax rates fi for different locations ,if the stat information.	t or different states of US.You can te information varies for a state	select the location from the than click on the exception	e drop down below to assign tax button close to it and fill the tax	fig.3
Locations Warehouse	Import from Default	Superseded Tax		
State	Tax(%)	Save		
Alabama	6.00	Save Exceptions		
Alaska	0.00	Save Exceptions		
Alberta	0.00	Save Exceptions		
Arizona	0.00	Save Exceptions		
Arkansas	0.00	Save Exceptions		
British Columbia	0.00	Save Exceptions		
California	0.00	Save Exceptions		
Colorado	0.00	Save Exceptions		
		1	I	

Zip Code From	Zip Code To	Tax Rate	
36601	36605	6.75	
		0	
		0	
		0	
		0	
		0	
		0	
		0	
		0	
		0	

- 6) Rates can also be assigned to customer accounts independently from the rates assigned to state and zip code. Clicking on the "Superseded Tax" link at the top of the Sales Tax Management screen will load the customer account table. Customer accounts can quickly be found by entering the account number in the "Customer #" field and clicking the "Search" button. To assign a new rate click the "Edit Here" link in the "Change" column. (fig.5)
- 7) After the "Edit Here" link is selected the page will reload and a user definable field will appear in the "Customer" column. Enter the desired tax rate in this field and click the "Update" link in the "Change" column. (fig.6)

Use this pag sales tax; if	e to superse tax rate is s	ede tax rate et to blank t	for a part hen defau	icular customer. You can click on edit link to set tax rate for the customer and Update it. Enter 0 to e Ilt tax would be applicable for the customer.	exempt
Customer	#			Search	
Customer Number	Customer State	Customer Location	Default Tax	Customer <%=Weblink.Portal.Permissions.ConfigurationSetting.WebwareLocaleSettings.State%>	Change
DEFAULT	Alabama	MRS Test Location 2	0.00	Default Tax	Edit Here
KPWL	California	Test Location12	5.50	0.00	Edit Here
S52818	Minnesota	Test Location12	0.00	0.00	Edit Here
5534	Minnesota	Test Location12	0.00	0.00	Edit Here
4757	Wisconsin	Test Location12	0.00	0.00	Edit Here

Customer Number	Customer State	Customer Location	Default Tax	Customer <%=Weblink.Portal.Permissions.ConfigurationSetting.WebwareLocaleSettings.State%>	Change	fig.6
DEFAULT	Alabama	MRS Test Location 2	0.00	0.00	<u>Update</u> <u>Cancel</u>	5

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