

# 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)
- 3) 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)

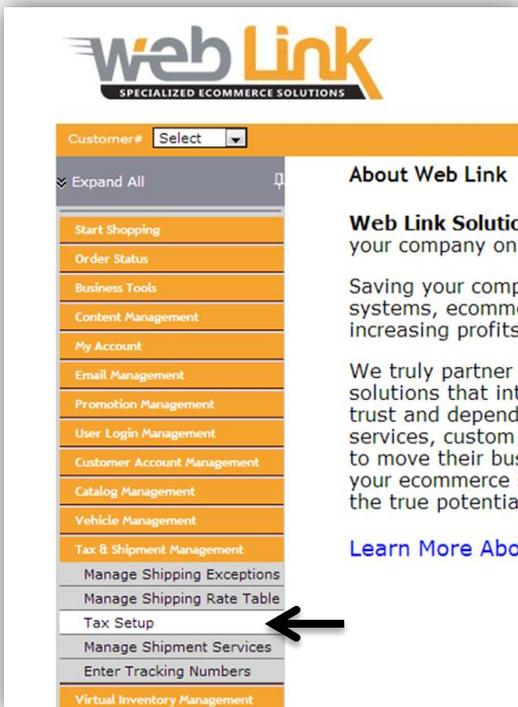


fig.1

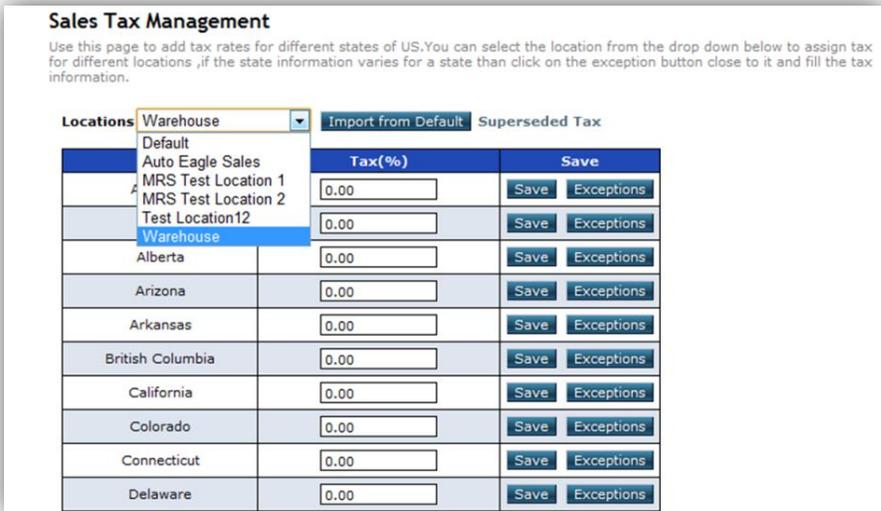


fig.2

- 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)

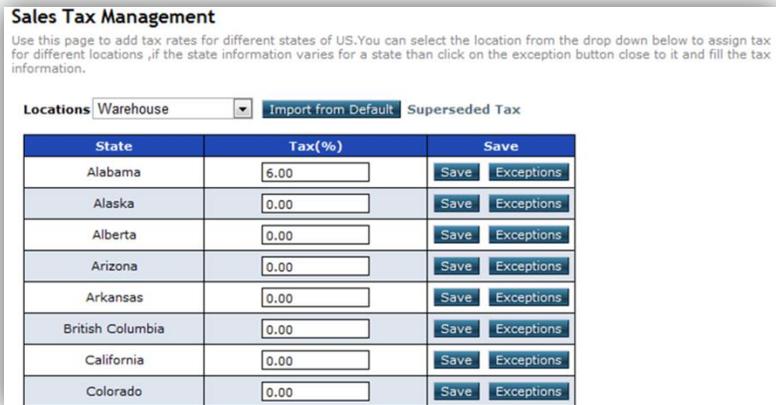


fig.3

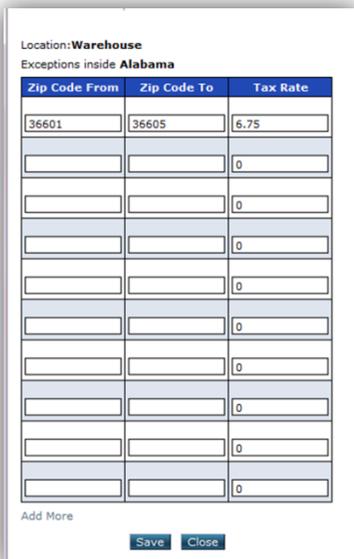


fig.4

- 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 Clicking on the "Superseded Tax" link at the top of the Sales Tax Management screen will load the customer account table.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 page to supersede tax rate for a particular customer. You can click on edit link to set tax rate for the customer and Update it. Enter 0 to exempt sales tax; if tax rate is set to blank then default tax would be applicable for the customer.

Customer #

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	<a href="#">Edit Here</a>
KPWL	California	Test Location12	5.50	0.00	<a href="#">Edit Here</a>
S52818	Minnesota	Test Location12	0.00	0.00	<a href="#">Edit Here</a>
5534	Minnesota	Test Location12	0.00	0.00	<a href="#">Edit Here</a>
4757	Wisconsin	Test Location12	0.00	0.00	<a href="#">Edit Here</a>

fig.5

Customer Number	Customer State	Customer Location	Default Tax	Customer <%=Weblink.Portal.Permissions.ConfigurationSetting.WebwareLocaleSettings.State%>	Change
DEFAULT	Alabama	MRS Test Location 2	0.00	<input type="text" value="0.00"/>	<a href="#">Update</a> <a href="#">Cancel</a>

fig.6