



Setup Guide

General Ledger Tax Groups

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Use the following table for help making additional changes to the tax group if required.

Group Description	Describes the state or locality the tax group applies to.
Preferred	Set this field to Y if you have G/L companies only. In an environment where there are Business Office or Fixed Operations companies that use this company for the general ledger, you have the option of selecting which company(s) this tax group is preferred for. Hit F4 on the Preferred* field to select the companies that need to use this tax group.
Tax Description	Describes the type of tax for the given tax rate. For example, State Sales Tax, Broward County Tax, etc.
Rate	Key in rate in whole numbers (e.g., enter 6.5% (0.065) as 6.5).
Threshold	The threshold limits the tax to amounts above the specified dollar threshold. For example, a tax may be applied to amounts above \$5,000.00.
Ceiling	Typically this is set to 999999 which means no ceiling. The ceiling limits the tax to amounts below the specified dollar ceiling. For example, a tax may be applied to amounts under \$5,000.00.
Account*	Key in the liability account that is credited for collected taxes. Hit F4 on this field to select from the chart of accounts.
Vendor*	Typically this is left blank. If this field is left blank, the tax transactions in the tax liability account will be controlled by the document number, i.e., the repair order number or parts invoice number. You can use a valid vendor number to control the tax amounts in the tax liability account by a vendor number by keying in the vendor number in this field.
Line Payment Methods	Set each row to Y or N for each line payment method. For example, the first row is for labor. Set the 1 st field to Y if labor is taxable for customer pay; set the 2 nd field to N if labor is non-taxable for warranty, etc.