



## To Create or Change a Tax Authority

1. Select Data Options Setup from the Setup menu.
2. Click Tax Authorities under Financial Setup.
3. Click the New Record icon.
4. Enter the Abbreviation "NC State"
5. Optionally enter a description
6. Enter the rate as a number
7. Select a General Ledger account from the drop-down list.
8. Enter a payable to "NC Department of Revenue"
9. Enter the corresponding accounting authority (Peachtree users only)
10. Optionally enter any comments.

## Create a new Tax Code

1. Select Data Options Setup from the Setup menu.
2. Click Tax Codes under Financial Setup.
3. Click the New Record icon.
4. Enter the Tax Code "Wake County"
5. Optionally enter a description
6. Enter the corresponding link code (Peachtree users only)
7. Select the appropriate Tax Authorities to build the new Tax Code.

## Update Tax Codes

1. Select Update Tax Codes from the Tools menu.
2. Select the Contact Tax Code to be updated.
3. Select the New Tax Code.
4. Click the Update Tax Codes icon
5. Repeat until all Contact Tax Codes are correct.

## Create a new Tax Assignment

1. Select Data Options Setup from the Setup menu.
2. Click Tax Assignments under Product Setup.
3. Click the New Record icon.
4. Enter the Assignment name "Taxable 7 % "
5. Select the appropriate Default Tax
6. Select the appropriate Available Taxes (Customer Checkout Drop-Down list) to build the new Tax Assignment.

## Update Tax Assignments

1. Select Update Tax Assignments from the Tools menu.
2. Select the Product Tax Assignment to be updated.
3. Select the New Tax Assignment.
4. Click the Update Tax Assignments icon
5. Repeat until all Product Tax Assignments are correct.