



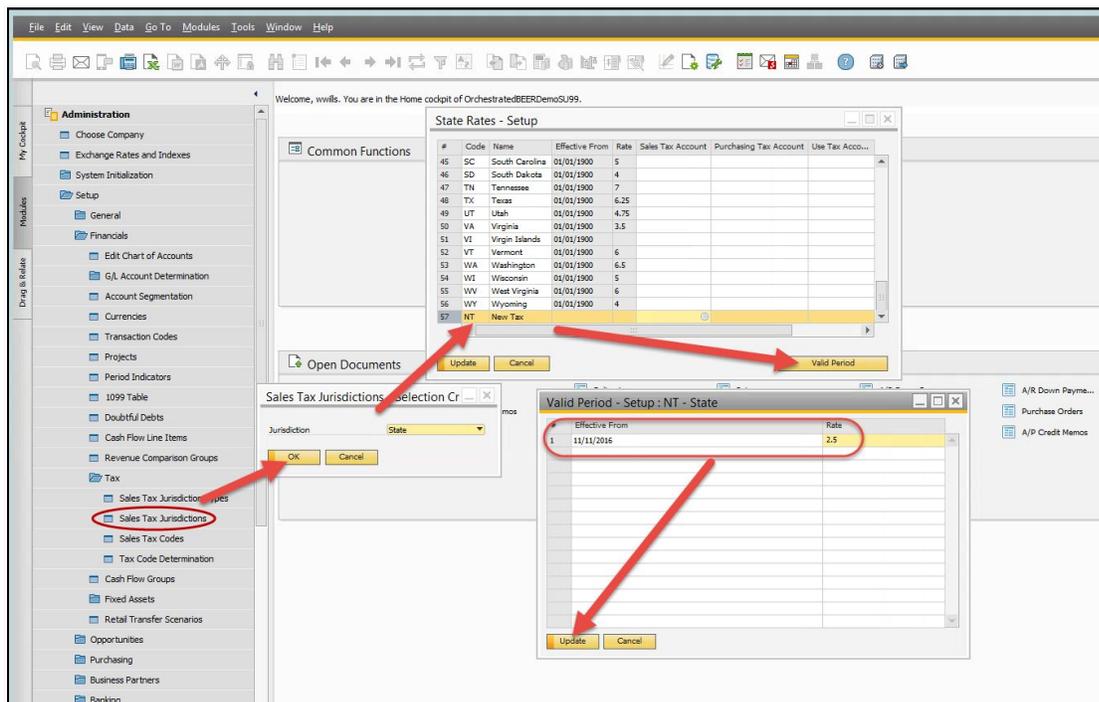
Summary

This article will talk through how to set up and adjust new tax codes.

Step by Step Guide

To set up new Tax Codes:

- Go to Administration-> Setup -> Financials -> Tax -> Sales Tax Jurisdictions -> Choose the type of jurisdiction you want to bring up (state, city, county, ...)
- Enter in your desired tax codes at the bottom of the existing codes list. (The system won't let you click into the fields *Effective From* or *Rate*)
- Once you have the *Code* and *Name* entered, you will need to press on the *Valid Period* button in the bottom right corner so that you can enter the effective date as well as the rate. (This should add the code(s)to your pre-programmed list to add into the Sales Tax Codes function right below the Jurisdictions).
- Go into Sales Tax Codes and fill in the necessary fields. Under the "Code" choose the tax code you created in the previous step. Once this is complete, click Add. You can now choose this Tax Code for items on documents.





To adjust existing Tax Codes:

- Go to Administration-> Setup -> Financials -> Tax -> Sales Tax Jurisdictions -> Choose the type of jurisdiction you want to bring up (state, city, county, ...)
- Instead of adding a new tax rate as we did before, you would click into the desired fields of the code you want to change and hit "*Validate Period*." This should then allow you to change the effective date as well as the rate.

Another useful resource regarding Tax Codes: How do I get the Tax Code to automatically set on documents?

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