

# Sales Tax Codes

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## Overview

Sales tax codes are used to determine whether an item and/or a customer is taxable.



If you integrate with QuickBooks Online, you cannot modify the item sales tax or tax codes in Order Time inventory. QuickBooks Online does not have an API for 3rd party apps to manages those lists. Users can only manage them from within QuickBooks Online itself.

## Enter Sales Tax Codes

Enter the *Tax Name*, select if the Sales Tax Code is *Active*, select if the Sales Tax Code is *Taxable* and enter a *Description* for the Tax Code. To access the Sales Tax Codes setting click on the Gear icon on the top right of the screen, under General category, Click on Profile List. Under the Sale category click on Sales Tax Codes.

- If an item or customer is taxable (i.e. when "Taxable" is selected.), then the software will use the item's *Sales Tax Rate* to determine the tax on *Quotes, Sales Orders* and *Ship Docs*.
- The Customer's sales tax code *Overrides* an item's sales tax code. For example, if an item is generally taxable but the customer is non-taxable, there will be **NO** tax charged.

The screenshot shows the 'Sales Tax Code' configuration page in the OrderTime software. The page has a dark blue navigation bar at the top with the following menu items: Home, Sales, Purchasing, Production, Warehouse, and Reports. Below the navigation bar, there is a breadcrumb trail: Admin > Profile Lists > Sales Tax Codes. The main content area is titled 'Sales Tax Code' and contains a sidebar on the left with the following sections: 'Active Status' with radio buttons for Active (selected), Inactive, and Both; 'Records' with a plus icon and two rows: 'Non' and 'Tax', each with a plus icon; and a main form area with the following fields: 'Name' (text input), 'Active' (checkbox, checked), 'Taxable' (checkbox, unchecked), and 'Description' (text area). In the top right corner of the main form area, there are 'Save' and 'Reset' buttons.

