

Item Sales Tax

Last Modified on 04/10/2019 11:54 am EDT

Overview

The Item Sales Tax profile helps you manage, calculate and add tax charges to a taxable item. Order Time also allows you the option to assign the tax agency to which sales taxes are paid. Once an Item Sales Tax has been implemented, it will apply the tax required for the taxable items.



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.

Item Sales Tax

To create a Item Sales Tax click on the *Gear* icon and select **Profile List**. Under the *Sales* section, select **Item Sales Tax**.



Taxable status of items and customers is determined by the sales tax codes assigned to them. If an item is taxable, and the customer is buying that item is taxable, then the sle tax charge is applied to the sale.

Once the Item Sales Tax screen opens, complete the following:

1. Enter a *Name* for your your Tax Record.
2. Select from the drop down list *Single*. This will indicate that this will be your first tax record. You will need to review your location's sales tax code. You are also responsible for setting up your sales tax for each tax district (city, county or state)

3. Under the Tax Rate, enter the tax rate.
 - If you are required to enter multiple sales tax entities, you first need to establish one at a time.
 - Once one the tax entity has been set up and saved, proceed to create another one.
 - Create and save each of the tax identity as needed.
4. Select a Vendor. **Vendor** will be used as the Tax Agency.
5. Fill-out the *Description* field with the necessary information.

The second phase is to establish a sales tax group. This group is needed when you have several tax requirements (i.e. county, state)

The screenshot shows the 'Item Sales Tax' form in the OrderTime system. The form is titled 'Item Sales Tax' and has a 'Save' and 'Reset' button in the top right. On the left, there is a sidebar with 'Active Status' (Active, Inactive, Both) and a list of 'Records' including Broward, CA, CA - LA Country, Combined, Dade, FL, LA County, Out of State, and STORE 2. The main form area has the following fields:

- Name:** Broward
- Type:** Single
- Active:**
- Tax Rate:** .5 %
- Vendor:** Asbury Import Management Inc
- Description:** City of Broward Tax
- Members:** (empty list)

 Numbered callouts 1 through 5 point to these fields respectively.

Set up multiple Tax

If you have a sales location where you need to charge more than one sales tax rate (i.e. county and a state tax) then you need to set up two sales tax items. You then need to combine these two sales tax items as a sales tax group item so that only one sales tax charge is listed on your sales forms.

The screenshot shows the 'Item Sales Tax' form in the OrderTime system, now configured as a 'Combined' tax group. The sidebar on the left is the same as in the previous screenshot, but the 'Combined' record is highlighted. The main form area has the following fields:

- Name:** Combined
- Type:** Group
- Active:**
- Tax Rate:** 0.25 %
- Description:** Sales Tax
- Members:** A table with columns 'Single', 'Rate', and 'Delete'.

Single	Rate	Delete
FL	0.00	<input type="checkbox"/>
Broward	0.25	<input checked="" type="checkbox"/>

Click on **Save** when done.

