

Enterprise - How to Set Up Sales Tax on a Customer

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Sales Tax in Enterprise can be applied to customers, departments and worksites.

Note Typically, sales tax is location specific, meaning it should be applied based on where the employee works.

Note Not all states require sales tax on staffing services, please consult your tax professional for specific information for your location.

Sales Tax by Worksite

This is a great option when one worksite does have sales tax or the sales tax is different for each worksite(location).

Navigate to the customer's worksite where sales tax should be applied, or create a new worksite that will need sales tax applied. Verify the address information in the worksite details section is correct:

Bliss Cosmetics (Accounting)
123 Main Street
Palm Bay, FL 32908

Dr. Appt. James/RainGauge/visit/take donu...

setup worksite - details

worksite details

Active

Worksite HR Building

Attn To

Street 123 Main Street

Street 2

City Apple Valley

State MN Zip 55124-____

County Dakota

School

Country United States of America

Time Zone

DST Observed

tax information

State MNIncTax

Local taxes are automatically determined by the zip code.

County Tax Exempt

City Tax Exempt

School Tax Exempt

other information

Directions Go east on 95th street, turn right onto

Dress Code Professional attire, suits

Accessible Public Transportation

nto

Qualified

Private

Reason Code

Job Amount \$0.00

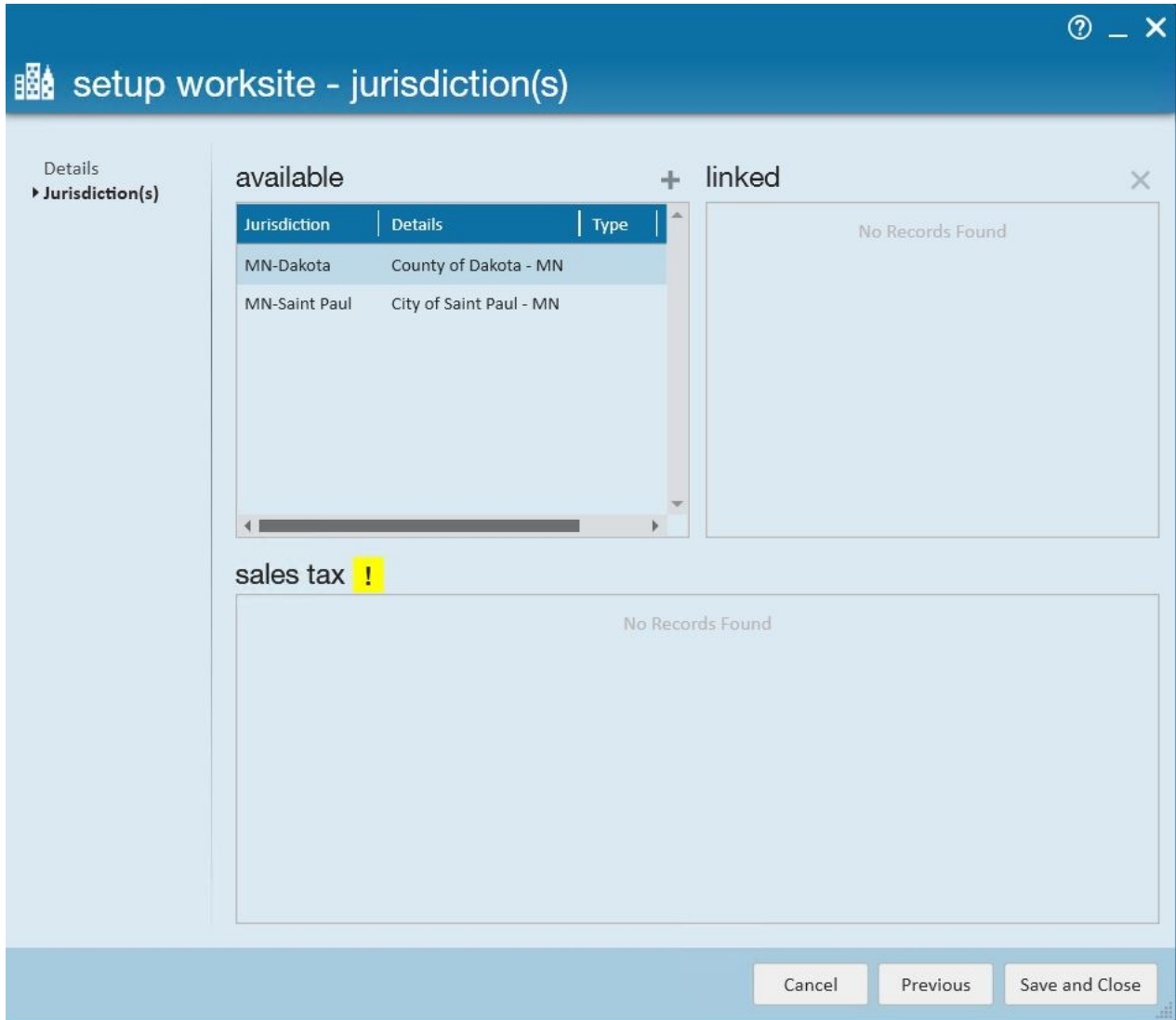
Date Filed

Release Date

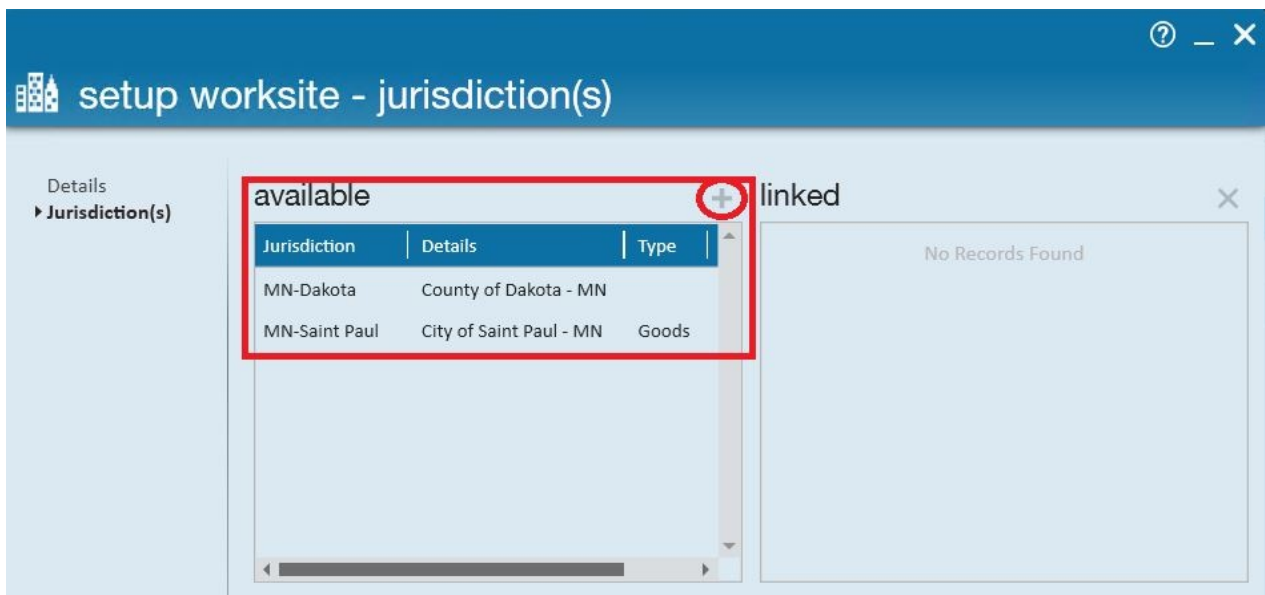
Notes

Cancel Previous **Save and Continue**

Select save and continue to open the setup worksite - jurisdiction(s) form:



Click to highlight the appropriate sales tax for this worksite then select the add button to apply that sales tax:



The selected tax jurisdiction will be displayed in the linked area as well as the sales tax area:

setup worksite - jurisdiction(s)

Details
▶ Jurisdiction(s)

available + linked x

Jurisdiction	Details	Type
MN-Dakota	County of Dakota - MN	

Jurisdiction	Details	Type
MN-Saint Paul	City of Saint Paul - MN	Goods

sales tax

Jurisdiction	Details	Type	Percent
MN-Saint Paul	City of Saint Paul - MN	Goods	7.63%
MN-Saint Paul	City of Saint Paul - MN	Services	7.63%

Cancel Previous Save and Close

Select save and close to apply sales tax to any future billing.

If sales tax has been applied to a worksite but needs to be removed or changed, navigate to the worksite, select save and continue to get to the setup worksite - jurisdiction(s) form for that worksite. Click to highlight the jurisdiction listed in the linked area and click the x to remove. Either save and close if there should be no sales tax applied to this worksite or select the proper sales tax jurisdiction to apply.

Note For Pennsylvanian folks, you may have multiple sales tax options:

available +			
Jurisdiction	Details	Type	Percent
PA Sales Tax GP	State of Pennsylvania - PA...		0.00%
PA Sales Tax	State of Pennsylvania - PA		0.00%

This is because sales tax in Pennsylvania can be calculated based on Gross Profit (GP) or Total Amount Billed. Work with your team to decide which option applies for your company and that worksite.

Sales Tax by Customer

If sales tax should be applied to **all employees and who work at any location** for a specific customer, the sales tax can be set up from the details page of the customer record:

We typically recommend setting up sales taxes on each worksite as each worksite might be subject to different sales tax amounts, etc.

The screenshot shows a customer record for "Blyss Cosmetics (Primary)". The page is divided into several sections:

- Customer Information:** Customer Name: Blyss Cosmetics, Department: Primary, Customer ID: 4295009897, Parent ID: [empty].
- Contact Information:** Street: 123 Main Street, City: Palm Bay, State: FL, Zip: 32908-____, Country: United States of America, Website: www.blyss.com.
- Customer Status:** Status: A Active, Activation Date: 12/7/2015, Date Created: 7/16/2014 1:31:00 PM.
- Billing Address:** Attention To: Accounts Payable, Street: PO Box 234, City: Palm Bay, State: FL, Zip: 32908-____, Country: United States of America.
- Contact Roles:** A table with columns: First Name, Last Name, Contact Type. Rows: Bob Becker (Report To), Ellyn Blyss (Supervisor).
- Sales Tax:** A section with a red box around the "sales tax" header and a circled "+" button. Below it, it says "No Records Found".
- Default Worksite:** Work Site: Marketing Building, 567 Frontage Road, Wayne, NJ 07470.

Click the add new button to apply sales tax, this will open the tax jurisdictions form. At the bottom of the form will be listed any available tax jurisdictions based on the customer's address within their contact information area:

customer information

Customer Name: Blyss Cosmetics
Department: Primary
Customer ID: 4295009897
Parent ID:

contact information

Street: 123 Main Street
Street 2:
City: Palm Bay
State: FL Zip: 32908-
Country: United States of America

Website: www.blyss.com

contact roles

First Name	Last Name	Contact Type
Bob	Becker	Report To
Ellyn	Blyss	Supervisor

tax jurisdictions

linked jurisdictions for zip code 32908

No Records Found

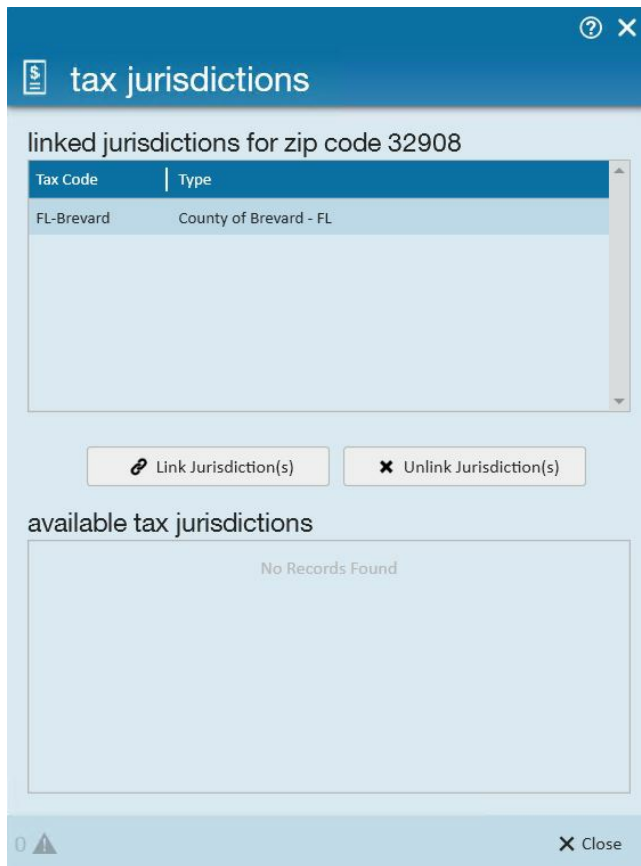
Link Jurisdiction(s) Unlink Jurisdiction(s)

available tax jurisdictions

Tax Code	Type
FL-Brevard	County of Brevard - FL

Close

Click to select and highlight the available tax jurisdiction then click the link jurisdiction(s) button. Once this is done, the tax jurisdiction will be displayed in the linked jurisdictions for zip code area:



Upon clicking close, the the sales tax will be displayed, including the percentage amount and this tax will apply to all future invoicing.

sales tax

Jurisdiction	Details	Type	Percent
FL-Brevard	County of Brevard - FL	Goods	6.0000%
FL-Brevard	County of Brevard - FL	Services	6.0000%

If sales tax has been applied to a customer but must be removed or changed, from the customer/details/sales tax area, select the edit button to open the tax jurisdictions form. Verify the tax jurisdiction to be removed is highlighted then click the unlink jurisdiction(s) button. Click to select close and the sales tax jurisdiction will be removed.

If needing to apply a correct jurisdiction, select the correct available tax jurisdiction to apply by clicking to highlight then click the link jurisdiction(s) button to link it.

? X
tax jurisdictions

linked jurisdictions

Tax Code	Type
FL-Brevard	County of Brevard - FL

Link Jurisdiction(s)

 Unlink Jurisdiction(s)

available tax jurisdictions

Tax Code	Type
AB - PST	Alberta - Provincial Sales Tax
AK-Adak	City of Adak - AK
AK-Alakanuk	City of Alakanuk - AK
AK-Aleknagik	City of Aleknagik - AK
AK-Aniak	City of Aniak - AK
AK-Bethel	City of Bethel - AK

0
X Close

Sales Tax by Department

To apply sales tax by department navigate to the customer/department/details form and follow the same instructions as sales tax by customer. Setting the sales tax at the department level will apply the sales tax to all invoices produced by this department.

Blyss Cosmetics (Accounting)

123 Main Street
Palm Bay, FL 32908

ID: 4295010/98
Parent ID : 4295009897

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