

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:

Blyss Cosmetics (Accounting) 123 Main Street Palm Bay, FL 32908 Dr. Appt. James/RainGauge/visit/take donu...

setup worksite - details

visifile details assignment restrictions contact methods departments interest codes sales & service vendor management **worksites** defaults documents integrations invoice history invoice setup evaluations messages payment history **employee** **customer** order assignment contact pay / bill calendar reports

Details Jurisdiction(s)

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
School Tax

other information

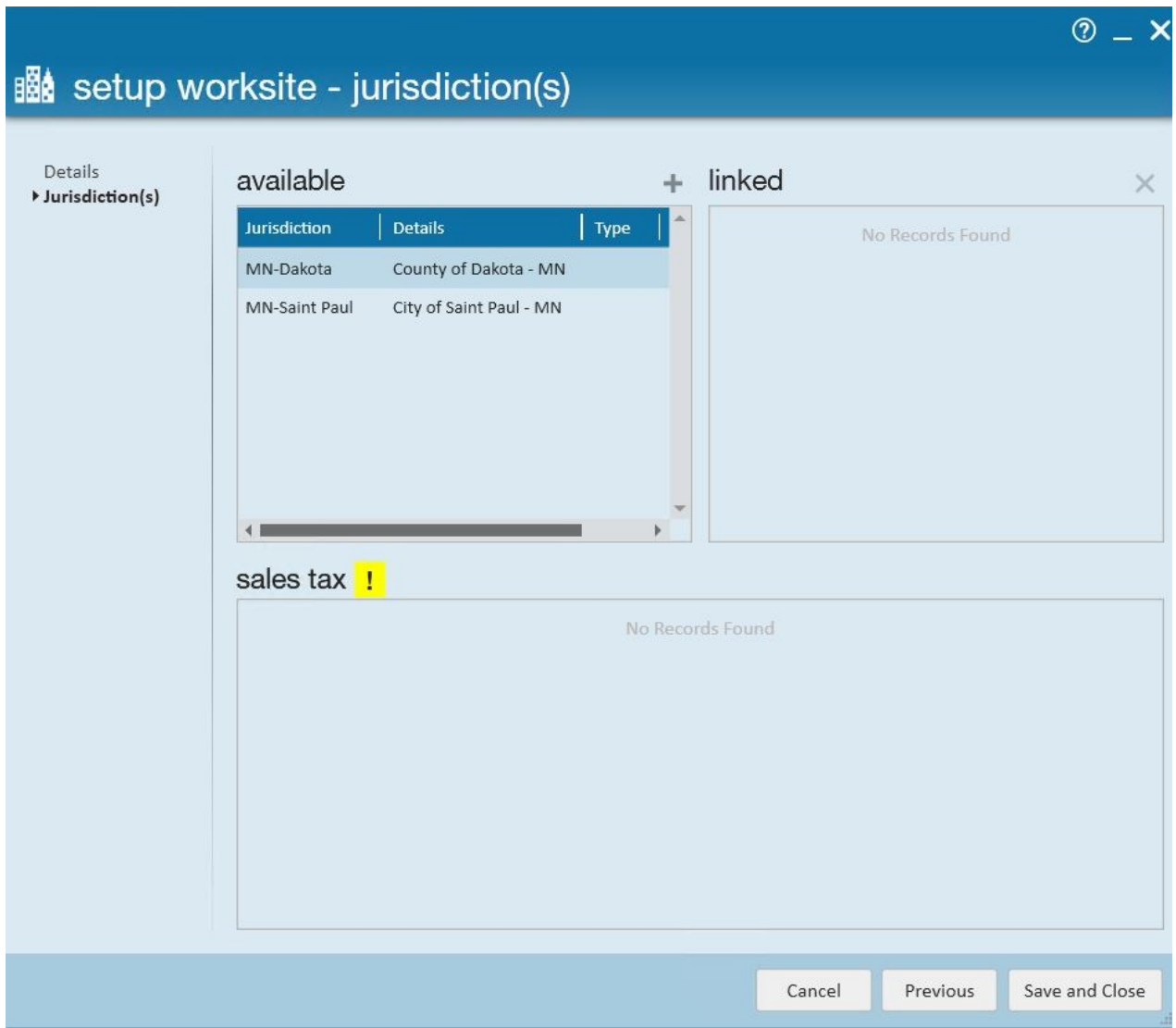
Directions Go east on 95th street, turn right onto
Dress Code Professional attire, suits
 Accessible Public Transportation

nto

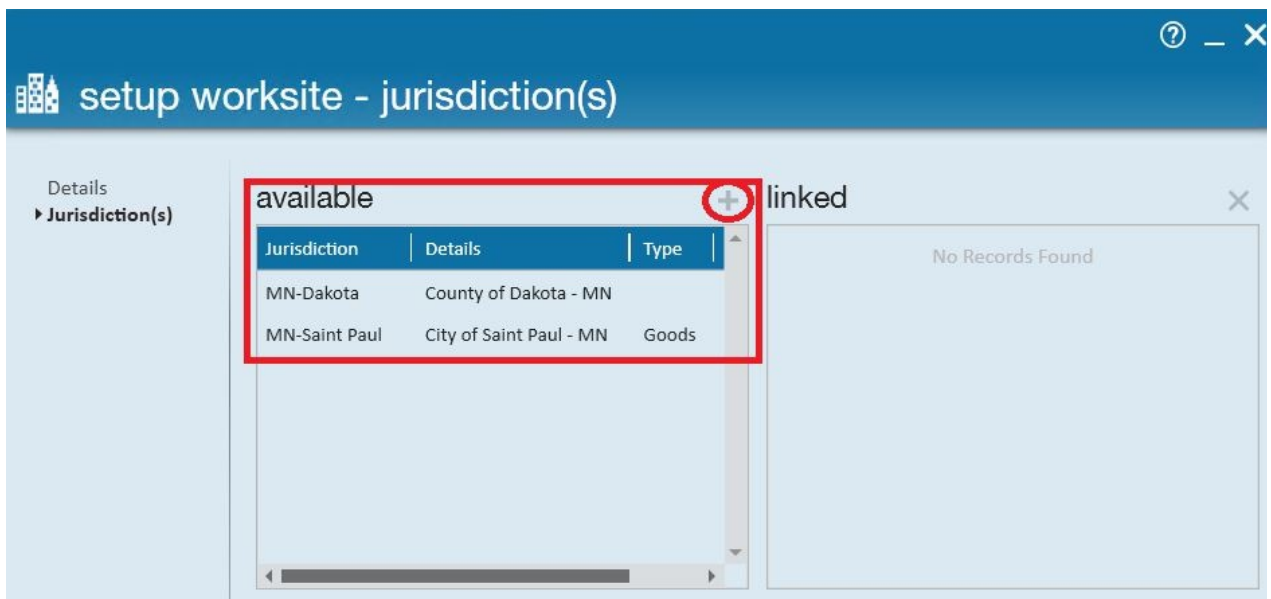
Qualified
Private
Reason Code
Job Amount \$0.00
Date Filed
Release Date
Notes

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:

The screenshot shows a software window titled "setup worksite - jurisdiction(s)". On the left is a sidebar with "Details" and "Jurisdiction(s)". The main area is divided into three sections: "available", "linked", and "sales tax".

available

| Jurisdiction | Details | Type |
|--------------|-----------------------|------|
| MN-Dakota | County of Dakota - MN | |

linked

| 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% |

At the bottom right are buttons for "Cancel", "Previous", and "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.

Blyss Cosmetics (Primary)
 123 Main Street
 Palm Bay, FL 32908
 (321) 474-2868
 ID: 4295009897

! Dr. Appt.
 ! Chamber Meeting!!!
 ! JeffBaker/flu/call check in!

James/RainGauge/visit/take donu...
 mathew Marchsll Interview
 Molly/Rocky - call - check in

tasks appointments social email

visifile
 details
 assignment restrictions
 contact methods
 departments
 interest codes
 sales & service
 vendor management
 worksites
 defaults
 documents
 integrations
 invoice history
 invoice setup
 evaluations
 messages
 payment history
 employee
customer
 order
 assignment
 contact
 pay / bill
 calendar
 reports
 all options

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

customer status
 Status: A Active
 Activation Date: 12/7/2015
 Date Created: 7/16/2014 1:31:00 PM

contact information
 Street: 123 Main Street
 Street 2:
 City: Palm Bay
 State: FL Zip: 32908-____
 Country: United States of America
 Website: www.blyss.com

billing address
 Attention To: Accounts Payable
 Street: PO Box 234
 Street 2:
 City: Palm Bay
 State: FL Zip: 32908-____
 Country: United States of America

contact roles

| First Name | Last Name | Contact Type |
|------------|-----------|--------------|
| Bob | Becker | Report To |
| Eilyn | Blyss | Supervisor |

sales tax +

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:

The screenshot displays a CRM interface with a contact record for 'Blyss Cosmetics' and a 'tax jurisdictions' dialog box. The contact information includes:

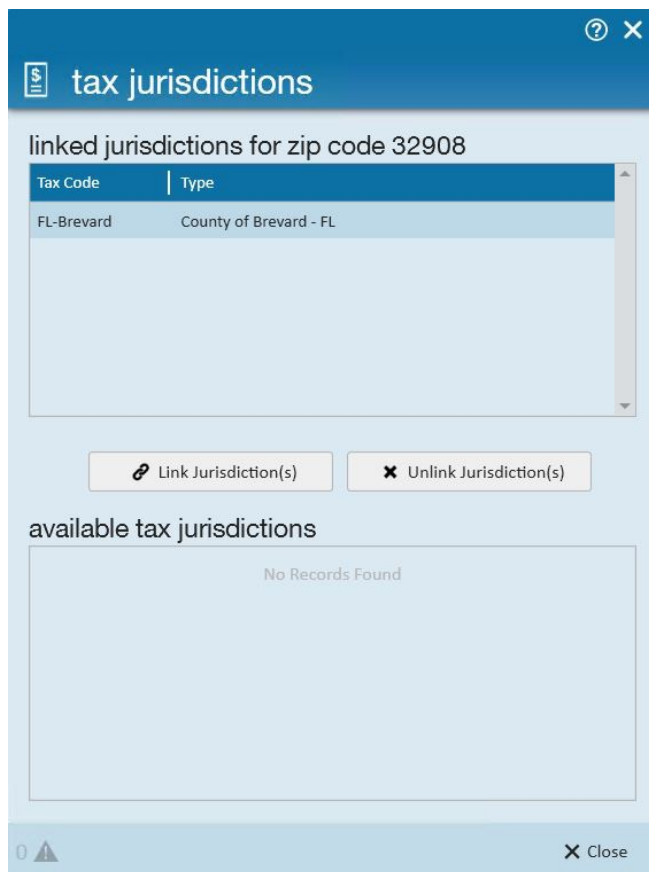
- Customer Name: Blyss Cosmetics
- Department: Primary
- Customer ID: 4295009897
- Parent ID: (empty)
- Street: 123 Main Street
- Street 2: (empty)
- City: Palm Bay
- State: FL
- Zip: 32908-
- Country: United States of America
- Website: www.blyss.com

The 'tax jurisdictions' dialog box is titled 'tax jurisdictions' and shows 'linked jurisdictions for zip code 32908' with 'No Records Found'. It features two buttons: 'Link Jurisdiction(s)' and 'Unlink Jurisdiction(s)'. Below these is a table of 'available tax jurisdictions':

| Tax Code | Type |
|------------|------------------------|
| FL-Brevard | County of Brevard - FL |

The 'available tax jurisdictions' table is highlighted with a red box. The dialog box also has a 'Close' button at the bottom right.

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: 4295010798
Parent ID : 4295009897

Navigation icons: +, ↩, ↻, ★, ↗, 🔍, ↑, ↓

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