

How to Add Tax Groups with Multiple Tables

11/05/2024 5:42 pm EST

There are many states that have multiple levels of taxes that can be charged for sales tax. Different items could be taxed differently depending on what the item is. For example: phone service may not be taxed but someone coming on site to give service will be taxed.

To make sure the correct taxes are being charged, the steps below will show the multiple steps on how to add an example tax group that has State, County, City and Other Authority that will need taxes assigned. The steps below assume the user will have the correct permissions to preform them.

**** ALWAYS verify the correct amounts with a reliable source as SedonaOffice does not update the data automatically**

1. Find the information needed to add all the correct taxes for the local to be added, in our example the total taxes between the different levels will be 8.2%

Colorado Springs sales tax range for 2024	
8.2%	
Colorado	2.9%
El Paso County	1.23%
Colorado Springs	3.07%
Pikes Peak Rta	1.0%
Total rate range	8.2%

Since there are multiple tax levels, each one will need to be entered separately

2. Log into SedonaSetup – Click on Tax Tables AR – Click on New

The screenshot shows the SedonaSetup application interface. On the left, a sidebar menu lists various setup options: Invoice Groups, Invoice Items, Item Types, Late Fee Rules, Setup Processing, Statement Rules, Tax Groups, Tax Tables (highlighted in blue), Terms, Cancellation Profiles, Cancellation Tasks, Chain Accounts, Collection Statuses, Custom Fields Setup(Customer), Custom Fields Setup(Site), and Custom Fields Setup(System). The main window displays the 'Tax Table' form with fields for Description, Account, and Tag Agency. A checkbox for 'Allow Line Item Exemption' is also present. On the right, a list of 'Item Types' is shown with checkboxes: Date Of Service, Inventory Part-Jobs, Inventory Part-Service, JPS-PST, Labor-Jobs, Labor-Service, LBS-PST, Materials-Service, Non-Inventory Part, and Non-Recurring. At the bottom right, there are three buttons: 'Apply', 'New' (highlighted in red), and 'Delete'.

3. Enter each Tax Level as its own table as shown below – Check off each item type that tax will be used

4. Click on Effective Dates & Formula Tab – Click on New – Enter the Effective Date (use 01/01/2024 or the correct start date of the rate) – Enter the Rate for that tax – Select the correct Formula Type from drop down – No end date will keep the tax rate until a new one is entered – click on Apply to set the rate – Click Apply again to save the full record

5. After all Tax Table rates have been entered should see then in the Tax Table list

CITY/ZIP CODE(S)	CITY/ZIP CODE(S)	TAX RATE	TAX AGENCY	IN
CO-Colorado Springs	CO-Colorado Springs	3.0700	CODR	N
CO-El Paso County	CO-El Paso County	1.2300	CODR	N
CO-Pikes Peak Rta	CO-Pikes Peak Rta	1.0000	CODR	N
CO-State	CO-State	2.9000	CODR	N

6. Will need to enter the Tax Group for the Tax Tables just entered - Click on Tax Groups AR in SedonaSetup – Click on New

7. In the Taxes Tab – Enter the Taxing Group Name (If there are different taxing entities for the same area, depending on the zip code, each will need to be added and should be named as such) – Select the Tax Codes for that group to be used – The remaining tabs can be used if needed – Click on Apply once all tabs and data filled in as needed

Tax Groups

☒ Tax Groups List

Tax Group	Description	Group Rate	Inactive
5000 Club	5000 Club	N	N
BCTAX	BCTAX	N	N
Manitou Default	Manitou Default	N	N
MI	MI	N	N
MI-Exempt	MI-Exempt	N	N
MI-Oakland County	MI-Oakland County	N	N
MI-Tax Exempt	MI-Tax Exempt	N	N
MI-Warren County	MI-Warren County	N	N

☐ Include Inactive

Taxes | US Geo Linking | **Group Rate Setup** | Product Lines

☐ Inactive

Taxing Group:

Description:

Tax Code	Description	Rate
☐ 1st 5000	1st 5000	7
☐ CA-California State	CA-California State	6.25
☐ CA-Riverside County	CA-Riverside County	1.5
☒ CO-Colorado Springs	CO-Colorado Springs	3.07
☒ CO-El Paso County	CO-El Paso County	1.23
☒ CO-Pikes Peak Rta	CO-Pikes Peak Rta	1
☒ CO-State	CO-State	2.9
☐ GST	GST	8
☐ MI 6%	MI 6%	6

Once the Tax Group is added, can click on the new Tax Group and see all Tax Codes selected: **Total Rate for this Tax Group = 8.2%**

Taxing Group: ☐ Inactive

Description:

Tax Code	Description	Rate
☒ CO-Colorado Springs	CO-Colorado Springs	3.07
☒ CO-El Paso County	CO-El Paso County	1.23
☒ CO-Pikes Peak Rta	CO-Pikes Peak Rta	1
☒ CO-State	CO-State	2.9
☐ 1st 5000	1st 5000	7
☐ CA-California State	CA-California State	6.25
☐ CA-Riverside County	CA-Riverside County	1.5
☐ GST	GST	8
☐ MI 6%	MI 6%	6

8. The new Tax Group can now be used on the Customer/Site as needed as shown below

Site Name and Address

☒ Residential ☐ Commercial

Site Number:

Site Name:

Add'l Name:

Address:

Phone 1:

Phone 2:

Fax:

☐ Copy Site Address to Billing

Comments:

Site Information

Branch:

Cross Street:

Map Code:

Customer Since:

Monitored By / CS Integration:

Tax Information

Tax Group:

CO-Colorado Springs	3.07%
CO-El Paso County	1.23%
CO-Pikes Peak Rta	1.0%

Cycle Tax Group:

CO-Colorado Springs	3.07%
CO-El Paso County	1.23%
CO-Pikes Peak Rta	1.0%

Tax Exempt #: