



Updating Sales Tax Rates

Software Development
RIMSS Business Systems Technology

Company Confidential

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Sales tax is charged using a sales tax group (Company → Sales Tax → Sales Tax Groups). Each sales tax group is comprised of one or more sales tax items. As you can see below, the NC Martin County tax Group is made up of two items, a state item and a county item. There may also be a local or city item involved. These sales tax items are not maintained by Rimss. If your sales tax changes, these sales tax item records must be manually updated. Once you determine the items that need to be updated proceed to Company → Sales Tax → Sales Tax Items.

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Add NewRefreshPrint

Sales Tax Groups represent the accumulation of individual Sales Tax Items that make up the total tax to be collected on a sale. A default Sales Tax Group should be selected to apply to taxable transactions at the point of sale. Sales Tax Groups can also be assigned to a Customer's Ship To Address in the Customer Master to ensure the proper tax is collected for sales shipped to other locations.

Drag a column header here to group by that column

Location	Inactive	Name	Description	Default	Last Modified By	Last Modified Date
WILLIAMST...	False	NON TAXABLE	NO TAX	False	SuperUser	12/8/2010
WILLIAMST...	False	NC MARTIN COUNTY	WILLIAMST...	True	SuperUser	12/8/2010
WILLIAMST...	False	NC BEAUFORT COUNTY		False	SuperUser	12/8/2010
WILLIAMST...	False	NC BERTIE COUNTY		False	SuperUser	12/8/2010
WILLIAMST...	False	NC CHOWAN COUNTY				
WILLIAMST...	False	NC CRAVEN COUNTY				
WILLIAMST...	False	NC DARE COUNTY				
WILLIAMST...	False	NC GATES COUNTY				
WILLIAMST...	False	NC HALIFAX COUNTY				
WILLIAMST...	False	NC ALAMANCE COUNTY				
WILLIAMST...	False	NC ALEXANDER COUNTY				
WILLIAMST...	False	NC ALLEGHANY COUNTY				
WILLIAMST...	False	NC ANSON COUNTY				
WILLIAMST...	False	NC ASHE COUNTY				
WILLIAMST...	False	NC AVERY COUNTY				
WILLIAMST...	False	NC BLADEN COUNTY				
WILLIAMST...	False	NC BRUNSWICK COUNTY				
WILLIAMST...	False	NC BUNCOMBE COUNTY				
WILLIAMST...	False	NC BURKE COUNTY				
WILLIAMST...	False	NC CABARRUS COUNTY				
WILLIAMST...	False	NC CALDWELL COUNTY				
WILLIAMST...	False	NC CAMDEN COUNTY				
WILLIAMST...	False	NC CARTERET COUNTY				
WILLIAMST...	False	NC CASWELL COUNTY				
WILLIAMST...	False	NC CATAWBA COUNTY				
WILLIAMST...	False	NC CHATHAM COUNTY				
WILLIAMST...	False	NC CHEROKEE COUNTY				
WILLIAMST...	False	NC CLAY COUNTY				

Sales Tax Group

Group Name: NC MARTIN COUNTY

Group Description: WILLIAMSTON DEFAULT

☐ Inactive

☒ Default

OK

Cancel

Available Sales Tax Items

Item Name	Limit Type	Current Rate
NC STATE	None	6.0000 %
NC NON TAXA...	None	0.0000 %
NC ADDL 2.2...	None	2.2500 %
NC ADDL .50...	None	0.0000 %
NC ALAMANC...	None	2.0000 %
NC ALEXANDE...	None	2.2500 %
NC ALLEGHAN...	None	2.0000 %
NC ANSON C...	None	2.0000 %

Selected Sales Tax Item(s)

Item Name	Limit Type	Current Rate	Taxable Status Code
NC MARTI...	None	2.2500 %	None
NC STATE	None	6.0000 %	None

Total = 8.25...

Once you get to the sales tax item you wish to change, double click on it to bring it up. You will notice in the example below, when the rate changes, you don't just go in and change the rate. You must add a new rate with an "As Of Date" equal to the effective date of the new rate. If you are aware of a new rate that will be effective at a future date, you can enter this item with the new effective date and it will not charge the new rate until this date is met. In my example below, my new rate becomes effective 3/1/2017 so I entered the rate with the future effective date. When your changes have been made, hit OK

Add New Refresh Print

Sales Tax Items represent the individual sales tax agencies for which you are required to collect tax. Each Sales Tax Item will include a percentage and a reference to a Supplier in your Supplier Master that has been set up with a Supplier Type of "Sales Tax Agency". This Supplier represents the entity that will receive payment of the collected tax. Sales Tax Items are assigned to Sales Tax Groups to accumulate the total tax percentage that should be collected on a sale. The Sales Tax Group is then assigned to a sales transaction.

Drag a column header here to group by that column

Inactive	Item Name	Sales Tax Agency	Current Rate	Limit Type	Taxable Limit	Rate After Limit	Print On Invoice	Tax On Tax
False	NC STATE	Default Sal...	6.0000 %	None	\$0.00	0.0000 %	False	False
False	NC NON TA...	Default Sal...	0.0000 %	None	\$0.00	0.0000 %	False	False
False	NC ADDL 2 ...	Default Sal...	2.2500 %	None	\$0.00	0.0000 %	False	False
False	NC ADDL	Default Sal...	0.0000 %	None	\$0.00	0.0000 %	False	False
False	NC ALAMA...	Default Sal...	2.0000 %	None	\$0.00	0.0000 %	False	False
False	NC ALEXAN...	Default Sal...	2.2500 %	None	\$0.00	0.0000 %	False	False
False	NC ALLEGH...	Default Sal...	2.0000 %	None	\$0.00	0.0000 %	False	False
False	NC ANSON ...	Default Sal...	2.0000 %	None	\$0.00	0.0000 %	False	False
False	NC ASHE C...	Default Sal...	2.0000 %	None	\$0.00	0.0000 %	False	False
False	NC AVERY ...	Default Sal...	2.0000 %	None	\$0.00	0.0000 %	False	False
False	NC BEAUF...	Default Sal...	2.0000 %	None	\$0.00	0.0000 %	False	False
False	NC BERTIE ...	Default Sal...	2.0000 %	None	\$0.00	0.0000 %	False	False
False	NC BLADEN...	Default Sal...	2.0000 %	None	\$0.00	0.0000 %	False	False
False	NC BRUNS...	Default Sal...	2.0000 %	None	\$0.00	0.0000 %	False	False
False	NC BUNCO...	Default Sal...	2.2500 %	None	\$0.00	0.0000 %	False	False
False	NC BURKE ...	Default Sal...	2.0000 %	None	\$0.00	0.0000 %	False	False
False	NC CABAR...	Default Sal...	2.2500 %	None	\$0.00	0.0000 %	False	False
False	NC CALDW...	Default Sal...	2.0000 %	None	\$0.00	0.0000 %	False	False
False	NC CAMDE...	Default Sal...	2.0000 %	None	\$0.00	0.0000 %	False	False
False	NC CARTE...	Default Sal...	2.0000 %	None	\$0.00	0.0000 %	False	False
False	NC CASWE...	Default Sal...	2.0000 %	None	\$0.00	0.0000 %	False	False
False	NC CATAW...	Default Sal...	2.2500 %	None	\$0.00	0.0000 %	False	False
False	NC CHATH...	Default Sal...	2.0000 %	None	\$0.00	0.0000 %	False	False
False	NC CHERO...	Default Sal...	2.0000 %	None	\$0.00	0.0000 %	False	False
False	NC CHOW...	Default Sal...	2.0000 %	None	\$0.00	0.0000 %	False	False
False	NC CLAY C...	Default Sal...	2.0000 %	None	\$0.00	0.0000 %	False	False
False	NC CLEVEL...	Default Sal...	2.0000 %	None	\$0.00	0.0000 %	False	False
False	NC COLUM...	Default Sal...	2.0000 %	None	\$0.00	0.0000 %	False	False
False	NC CRAVE...	Default Sal...	2.0000 %	None	\$0.00	0.0000 %	False	False
False	NC CUMBE...	Default Sal...	2.2500 %	None	\$0.00	0.0000 %	False	False
False	NC CUMBE...	Default Sal...	2.2500 %	None	\$0.00	0.0000 %	False	False

Sales Tax Item

Item Name: NC STATE

Sales Tax Agency: Default Sales Tax Supplier

☐ Inactive

☐ Print On Invoice

☐ Tax On Tax

Rate	As Of Date
5.7500 %	8/10/2008
4.7500 %	5/1/2011
6.0000 %	1/1/2017
6.5000 %	3/1/2017
*	

☐ Apply Limits ☐ by Each Unit Sold

Taxable Limit: \$0.00

Rate After Limit Exceeded: 0.0000 %

OK Cancel