

adding and linking a tax

Follow these detailed steps to add and link a tax.

The 'Information' form contains the following fields:

- Tax Name: Sales Tax
- Department: Treasury
- Report Cycle: Monthly
- Tax Authority: [Empty]
- Amount: 5.00%
- State: [Empty]
- Address: 123 Main Street
- City: New Orleans
- State: LA
- Zip Code: 70000
- Contact: Uncle Sam
- Contact Title: Director
- Contact Phone: (504)111-2222

Adding a Tax

1. From the SalonBiz®/SpaBiz® menu bar, click on the Blueprints icon.
2. Click the Accounting button.
3. Click the Add button.
4. Type in the name of the tax you wish to add.
5. Click the Add button.
6. From the Report Cycle drop down menu, select the way you report your taxes from the list.
7. Type in the tax amount in the Amount field.
8. Enter the information in the remaining fields. Although not necessary for the functionality of the feature this is a great place to store the information.
9. Click the Return to Previous Screen button.

The 'Default Settings' window for Accounting shows a list of tax types in a drop-down menu. The 'Sales Tax' option is selected. Below the menu, there are buttons for 'Reset to Blueprint Default' and 'Return to Previous Screen'. An 'Explanation of setting' section at the bottom states: 'Allows a tax type to be applied to products. For example, Federal tax may be designated Product Tax 1, While State tax can be entered as:'. The 'Questions' list includes: Gift Certificate Tax 2, Gift Certificate Tax 3, Gift Certificate Tax 4, Itemized Tax on Printed Receipts? (Yes), and Number of decimal places in currency? (2).

Linking a Tax

1. From the SalonBiz®/SpaBiz® menu bar click, on the Blueprints icon.
2. Click the Accounting button.
3. Click the Set Default Settings button.
4. Highlight by clicking once Product Tax 1.
5. In the drop down menu select the tax you created.
6. Click the Save Answer button.
7. Follow steps 1-7 for any additional taxes.
8. Click on the Return to Previous Screen button.

