

# Set Up Tax Details

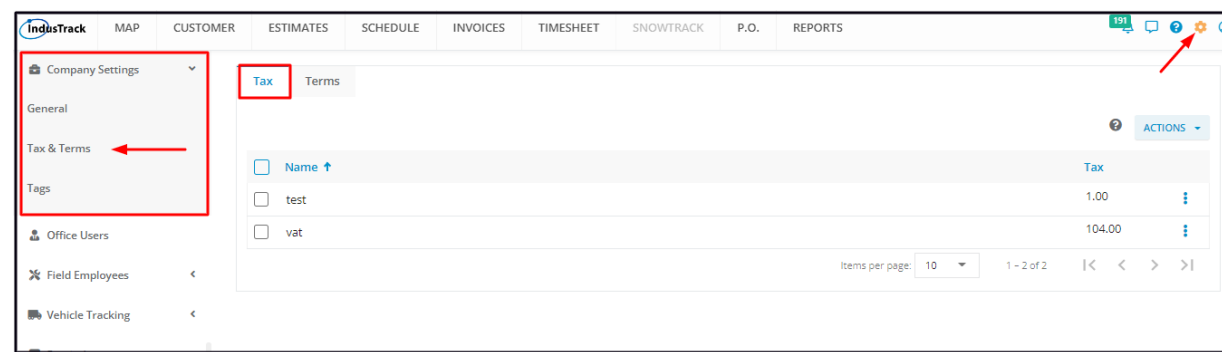
If you are registered to pay taxes, you can collect tax on your services and products in IndusTrack. Tax calculations may differ depending on where your business is located.

**Create tax rates** applicable to your business and used for different types of customers and services/inventory. You'll be able to prepare your documents and generate different reports without this information but they will be incomplete. Avoid the hassle by setting them up early on. You can always come back anytime to update and add more information.

The setup will allow you to save the tax rates for each of the areas you are servicing for easy and convenient use on estimates and invoices.

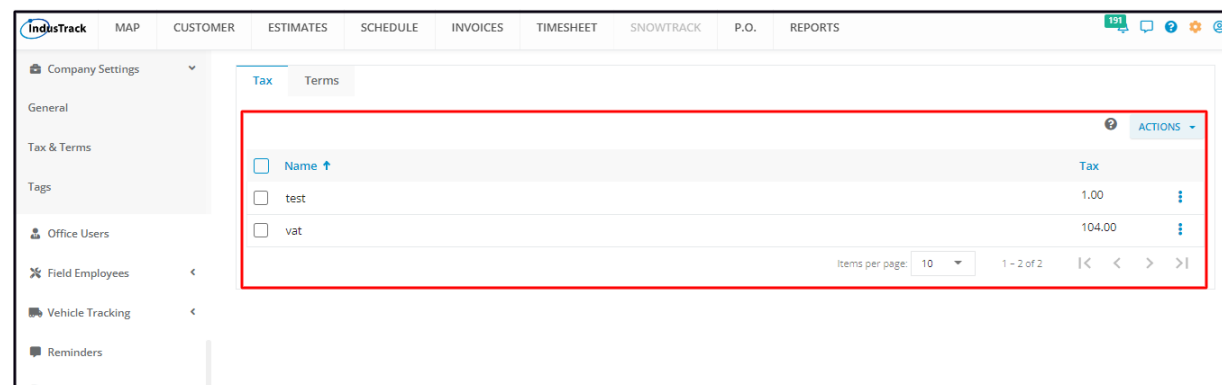
If you have integrated Industrack with your Quickbooks account, taxes from Quickbooks will sync to Industrack. **Note that taxes from Quickbooks cannot be edited once synced to Industrack.**

To access the Taxes page, go to **Settings > Company Settings > Tax & Terms > Tax**.



## Using the Tax Table

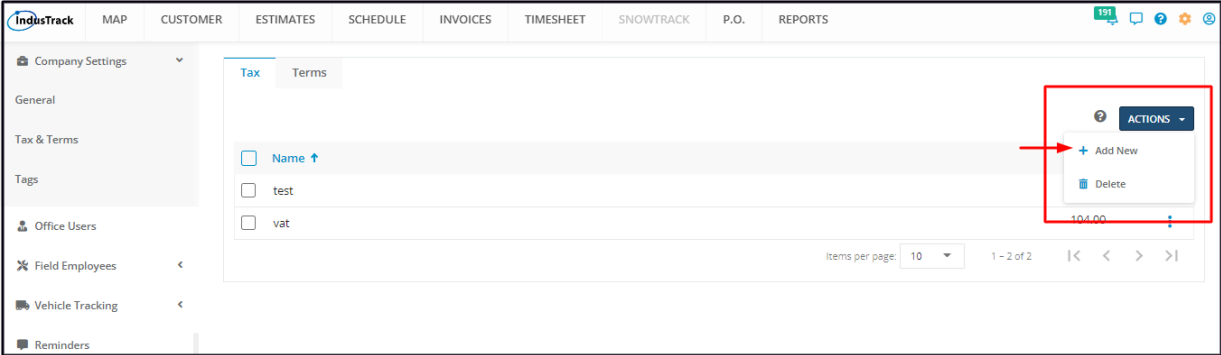
On the tax page, you will see the list of tax rates that have already been created and saved. From this page, you will also be able to view, create, edit, and delete Taxes.



- The Tax table has 3 columns:
  - Name – The name you gave your tax. The actual tax name such as income tax, payroll tax, sales tax, etc or one that you created.
  - Tax – The applicable tax rate.
  - Actions Menu Button – The 3-dot menu for each tax item that contains the **Edit** and the **Delete** options.
- Sort the tax list
  - Click on the column header to sort the tax list according to tax name or rate.
- Items Per Page
  - Select the number of tax items to be displayed per page. Options to choose from are 10, 25, 50, and 100.
  - Use the side arrows to move from one page to another (if there is more than one page). If there is only 1 page, this feature is disabled.

## Create a Tax Item

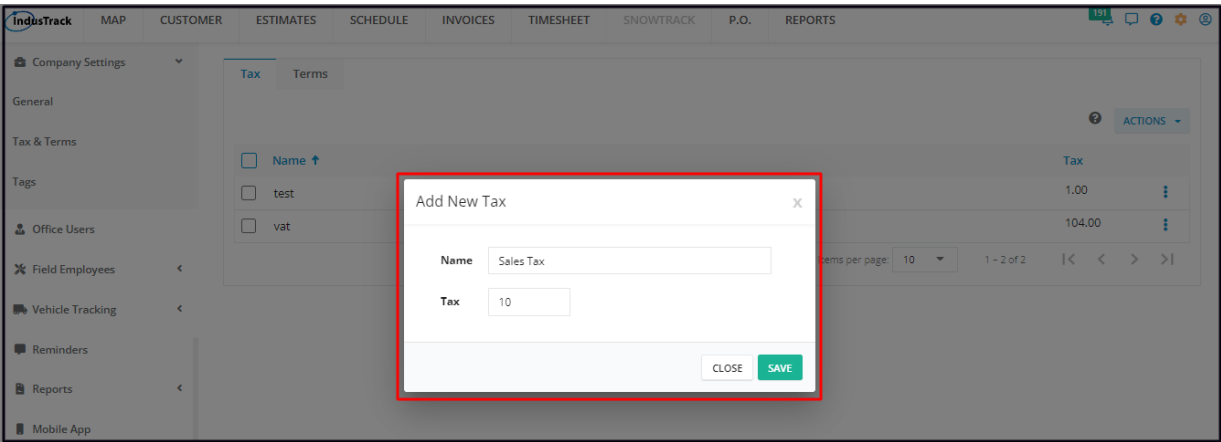
Go to the **Actions** button and select **+ Add New**.



Add the tax details on the **Add New Tax window**. Both fields are required.

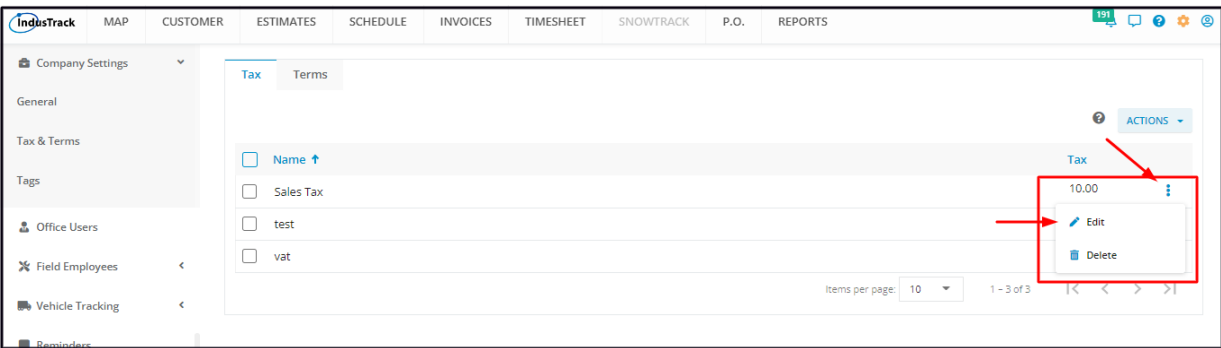
- **Name** – Create a name or use the actual tax name such as income tax, payroll tax, sales tax, etc.
- **Tax** – This is the applicable tax rate (in percentage).

Save the new Tax item. This will be added to the Tax List.

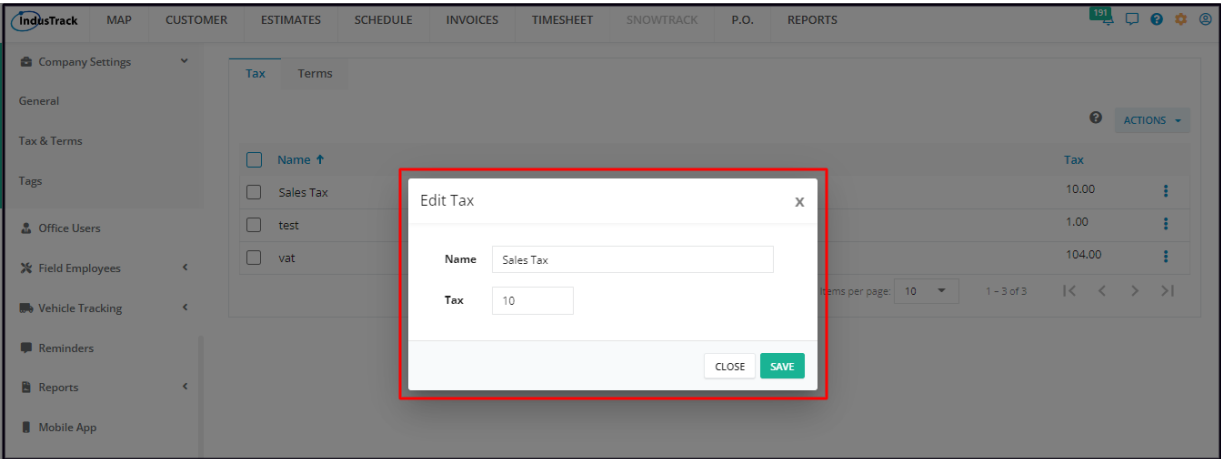


## Edit a Tax Item

Find the tax item to be updated from the list, click the 3-dot menu to the right, and select **Edit**.

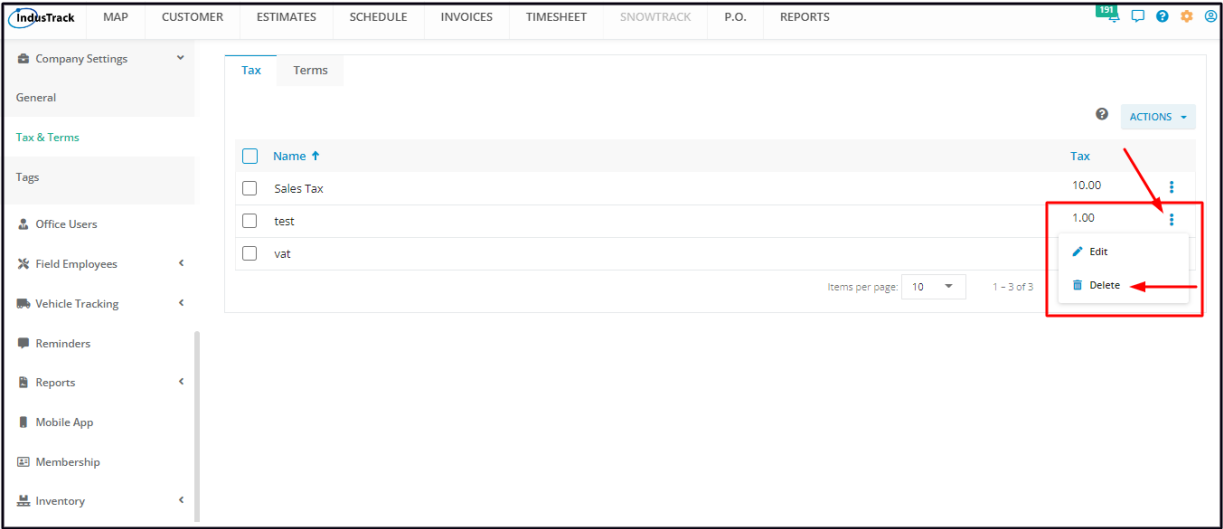


Edit as may be needed. Once done, **Save** the changes.



Delete a Tax Item

Find the tax item to be removed from the list, click the 3-dot menu to the right, and select **Delete**.



Confirm the delete action. The tax item will be removed from the list.

Alternatively, you can also tick the checkbox to the left of the tax item to be removed, go to the **Actions** button, and select **Delete**. To delete multiple tax items, tick the checkboxes to the left of all that are to be removed. If all tax items will be deleted, just tick the checkbox of the Name header.

