

Tax Calculator User Manual

1.0 Using the Tax Code Calculator

The Tax Code Calculator window is used to select the sales tax rate based on an address and zip code, or an address and city name. The selection in the Zip Lookup field on the Options window determines how the sales tax rates are selected, and it will determine which fields display in the window. For example, if you will select sales tax rates based on zip codes, a zip code field will display on the Tax Code Calculator window.

The Tax Code Calculator window can be opened from the Microsoft Windows Start menu by selecting Start> All Programs> Sales Tax Calculator> Sales Tax Calculator. Once this window is open, it will display as an icon on the system tray.

You can remove the icon from the system tray by right clicking on it and selecting Close. This will not only remove the icon from the system tray, it will also close the Tax Code Calculator window.

Lookup a Tax Rate

Enter a street address and zip code, or a street address and city and click the Lookup button. The sales tax code will display in the **Code** field, and the sales tax rate will display in the **Rate** field. If the sales tax rate and code couldn't be located based on the information entered into the window, a message will display at the bottom of the window.

The selection in the Zip Lookup field on the Options window determines what information you need to enter into the window.

- **Code** – The Code field displays the sales tax code based on the location entered into the window.
- **Rate**- The Rate field displays the sales tax rate based on the location entered into the window.
 - The sales tax rate is displayed as a decimal value, not a percent. For example, a sales tax rate of 8.2% will display as .0820 in the Rate field.
- **Invoice Date** – The Invoice Date field determines which sales tax rate will apply to the transaction.
 - When updated sales tax rates are loaded into the database using the Tax Calculator Options window, the new rates are saved with a begin date and an end date. For example, the first quarter sales tax rates for 2009 may have a begin date of January 1, 2009, and an end date of March 31, 2009. Any transaction with an invoice date that falls between these dates will use the new tax rates.