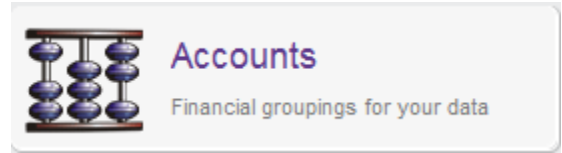**AWAREMANAGER**

Sales tax is set up in the **Account** module. In most implementations sales tax information should be entered as division specific records, not global records (this is because most implementations span multiple cities and states – all with different tax rates and rules).

Accounts
Financial groupings for your data

Once you have set up your tax account(s) the Tenant capsule is used to indicate whether or not a tenant is taxable, and if so which tax rate is appropriate. The appropriate sales tax account is entered in the Additional Amounts Tab.
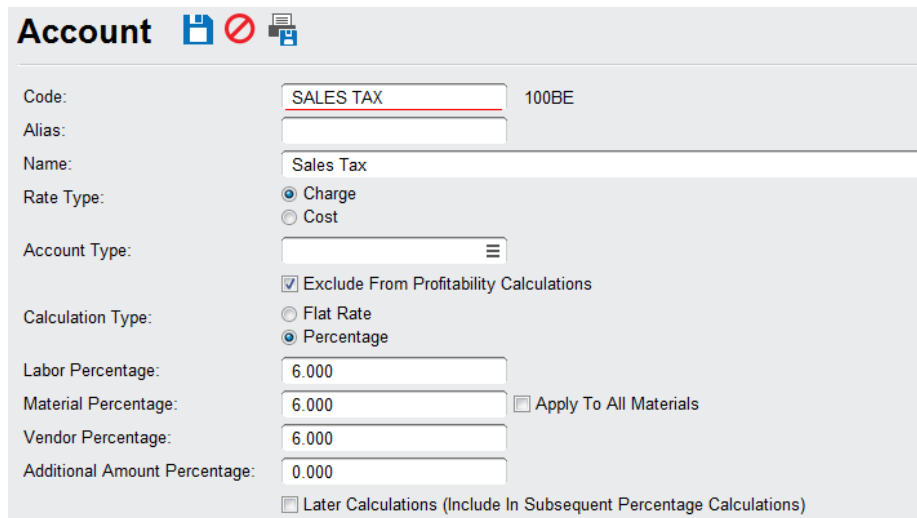
Hint: This same feature can be used for automated Mark Ups / Administrative Fees!

Enter tax account records

1. Make sure you are in the correct division by viewing the top of your screen.

> **AwareManager JXT**   **Current Database: demonstration**   **Active Division: 010ST**

2. Enter a record into the Account capsule for all Sales tax values.

3. Check **Exclude from Profitability Calculations** to exclude tax, because it is a cost and charge.

Account

Field	Value
Code:	SALES TAX 100BE
Alias:	
Name:	Sales Tax
Rate Type:	● Charge ○ Cost
Account Type:	☰
	☑ Exclude From Profitability Calculations
Calculation Type:	○ Flat Rate ● Percentage
Labor Percentage:	6.000
Material Percentage:	6.000 ☐ Apply To All Materials
Vendor Percentage:	6.000
Additional Amount Percentage:	0.000
	☐ Later Calculations (Include In Subsequent Percentage Calculations)

Hints:

- If you have multiple tax accounts enter the codes including an indication of the tax municipality (such as TAX-MA for Massachusetts tax).

- The Account Type field is optional, if you have multiple rates, you can create an Account Type for sales tax.

Update your tenant records

1. Open your list of tenants and view only those tenants that will have the same tax account, by hiding the rest of the tenants using the **Hide** ( ) icon.

Hints:

- Create a custom field in the Tenant module to denote if a tenant is Tax Exempt; this value can then be used to quickly sort your list.

- Sort by City and/or State to quickly group your tenants; you can then easily apply the appropriate tax accounts.

2. Select the first tenant in your list and edit the record. Enter the appropriate sales tax account in the tab called **Additional Amounts**.

Next, apply this sales tax to all tenants you are currently viewing in the list.

3. Highlight the tenant record you just updated.

4. Select **Operations→Copy Additional Amounts**. This will copy the sales tax account to all tenants showing in this list.