

PETRO-DATA, INC.

HELP INFORMATION - ADDING NEW TAXES

Adding new tax codes and tax authorities when you sell to a customer in a different jurisdiction than the ones already set up.

SUMMARY

1. Sales Tax Code - if sales tax on packaged goods or bulk oil apply
2. Fuel Tax Codes
3. Tax Authority
4. Territory

Now set up the customer in AR Customer file

DETAIL

1. Set up Sales Tax Code and rates for sales tax on packaged goods or bulk oil.

Accounts Receivable

Tax Files

Sales Tax

Add Change Delete Sales Tax

TAXCODE: Enter a new tax code number

Ex 87: Laurens Co

Tax Type: 2 (county)

Tax Percent: 8.00 (8%)

State: GA

The screenshot shows a window titled "Sales Tax File Maintenance". It contains several input fields: "Taxcode" with the value "53", "Name" with "PIKE COUNTY", "Taxtype" with "2", "Taxpercent" with "2.0000", and "State" with "GA". There is a magnifying glass icon next to the Taxcode field. At the bottom of the window, there are buttons for "Edit", "New", "Next", "Prev", "Delete", and "Exit".

2. Fuel Tax Codes and rates (including sales tax on fuel)

Jobber

Master File Maintenance

Fuel Taxes

Fuel Tax Add or Change

Click the magnifying glass and go to the end of the file to find the next available number (As of now there are numbers 216-227 available).

Note: 232-239 are available for more MS taxes.

Note: 244-249 are available for more NY taxes.

<Cancel>

Enter the code number like '216'

Enter the information as needed. See samples below.

Taxes for other States will be coded a little differently.

Fuel Tax	84				
Tax Description	WASHINGTON CO DYED DSL SALES				
Tax Type	N	Product Type	DD		
Tax Calculation	F	Charge Net / Billed	N		
Tax Rate	3.000000	State	GA	City Id	
Fuel Taxable	N	Sales Taxable	N		
GI Tax Paid	33800-	SALES TAX			
GI Tax Collected	33800-	SALES TAX			
Prepaid	N	Billed Net / Gross	N		
License Number		License Year		Permit Type	
Tax Category					
Usercode	84	User Description	WASHINGTON DYED DSL SALES		
Sort Code					

County sales tax on Dyed Diesel

Fuel Tax	212				
Tax Description	WASHINGTON CO GAS PPD LSE				
Tax Type	N	Product Type	GAS		
Tax Calculation	U	Charge Net / Billed	N		
Tax Rate	8.967000	State	GA	City Id	
Fuel Taxable	N	Sales Taxable	N		
GI Tax Paid	34200-	STATE GASOLINE TAX			
GI Tax Collected	34200-	STATE GASOLINE TAX			
Prepaid	N	Billed Net / Gross	N		
License Number	150	License Year		Permit Type	
Tax Category					
Usercode	212	User Description	WASHINGTON CO PPD LSE GAS		
Sort Code					

County Prepaid tax on Gasoline (Local Option, Special Purpose and Educational)

Fuel Tax	213				
Tax Description	WASHINGTON CO DIESEL PPD LSE				
Tax Type	N	Product Type	DC		
Tax Calculation	U	Charge Net / Billed	N		
Tax Rate	10.878000	State	GA	City Id	
Fuel Taxable	N	Sales Taxable	N		
GI Tax Paid	34100-	STATE DIESEL TAX			
GI Tax Collected	34100-	STATE DIESEL TAX			
Prepaid	N	Billed Net / Gross	N		
License Number	150	License Year		Permit Type	
Tax Category					
Usercode	213	User Description	WASHINGTON CO PPD LSE DIESE		
Sort Code					

County Prepaid tax on clear Diesel (Local Option, Special Purpose and Educational)

Documentation for Fuel Tax Maintenance is in the Jobber Manual under Master File Maintenance, Fuel Taxes, Fuel Tax Add and Change.

3. Tax Authority Code - this brings all codes within a jurisdiction into one record. The easiest way to set one up is to display a similar Tax Authority. For example, if you are setting up another county in GA, display FULTON.. Use the 'COPY' option to create a record for the new county. Then replace the 'Fulton County' codes with the sales tax and fuel tax codes for the new county that you just set up.

Jobber
 Master File Maintenance
 Fuel Taxes
 Tax Authority Add

Authority Code		FULTON	FULTON COUNTY	GA		
Ln #	Tax #	Type	Description	Prod Type	Tax Amt	Calc Type
1	0	S	NONE	ALL	0.0000	
2	1	S	FULTON - 060	ALL	3.0000	
3	99	S	GEORGIA STATE	ALL	4.0000	
4	0	S	NONE	ALL	0.0000	
5	0	S	NONE	ALL	0.0000	
6	3		FEDERAL CLEAR DIESEL	DC	24.4000	U
7	13		GA CLEAR DIESEL	DC	7.5000	U
8	17		GA CLEAR DIESEL PPD	DC	14.5000	U
9	20		GA UST CLEAR DIESEL	DC	0.5000	U
10	153		FULTON CO DIESEL PPD	DC	10.8780	U
11	8		FED DC ENVIRONMENTAL	DC	0.1900	U
12	4		FEDERAL UST DYED DIE	DD	0.1000	U

Enter line # to chg A - Add line Q - Quit
 D - Delete S - Scan C - Copy

Authority Code		FULTON	FULTON COUNTY	GA		
Ln #	Tax #	Type	Description	Prod Type	Tax Amt	Calc Type
13	21		GA UST DYED DIESEL	DD	0.5000	U
14	40		FULTON DYED DSL SALE	DD	3.0000	F
15	9		FED DD ENVIRONMENTAL	DD	0.1900	U
16	35		GA STATE DYED DIESEL	DD	4.0000	F
17	1		FEDERAL GASOLINE	GAS	18.4000	U
18	11		GA GASOLINE	GAS	7.5000	U
19	15		GA GAS PREPAID TAX	GAS	12.0000	U
20	18		GA UST GASOLINE	GAS	0.5000	U
21	152		FULTON CO GAS PPD ML	GAS	8.9670	U
22	7		FED GAS ENVIRONMENTA	GAS	0.1714	U
23	5		FEDERAL CLEAR KEROSE	KC	24.4000	U
24	14		GA CLEAR KEROSENE	KC	7.5000	U

Ln #	Tax #	Type	Description	Prod Type	Tax Amt	Calc Type
25	22		GA UST CLEAR KEROSEN	KC	0.5000	U
26	6		FEDERAL UST DYED KER	KD	0.1000	U
27	26		GA UST DYED KEROSENE	KD	0.5000	U

*Tax Authority Record for Fulton County GA
 (Complete record is three screens - use 'S' to scan between screens)*

'C' to copy this record to a new Tax Authority.

New tax authority number **LAUREN** **LAURENS COUNTY** Ok? (Y/N)

Authority Code	LAUREN	LAURENS COUNTY	GA			
Ln #	Tax #	Type	Description	Prod Type	Tax Amt	Calc Type
1	0	S	NONE	ALL	0.0000	
2	87	S	Laurens County GA	ALL	4.0000	
3	99	S	GEORGIA STATE	ALL	4.0000	
4	0	S	NONE	ALL	0.0000	
5	0	S	NONE	ALL	0.0000	
6	3		FEDERAL CLEAR DIESEL	DC	24.4000	U
7	13		GA CLEAR DIESEL	DC	7.5000	U
8	17		GA CLEAR DIESEL PPD	DC	14.5000	U
9	20		GA UST CLEAR DIESEL	DC	0.5000	U
10	153		FULTON CO DIESEL PPD	DC	10.8780	U
11	8		FED DC ENVIRONMENTAL	DC	0.1900	U
12	4		FEDERAL UST DYED DIE	DD	0.1000	U

Select line '2' and enter the Sales Tax Code entered in AR (87 in the example above). The new tax code and rate will display.

Select line '10' and replace with the new Laurens County Diesel PPD code.

Scan to the next screen and replace line '14' and '21' with the new Laurens County tax codes.

Scan through the entire record to make sure that all 'Fulton' tax codes have been replaced with 'Laurens' tax codes.

4. Territory Code

- Jobber
- Master File Maintenance
- Territory
- Add Change Delete Territory

Territory File Maintenance

Territory: 87

Name: LAURENS COUNTY

Edit New Next Prey Delete Exit

Enter a Territory code and name as shown above.

NOTE: If you are setting up a Tax Authority for a new State, use the NY or MS tax authority to copy. These will have fewer codes that might need to be deleted.

CUSTOMER RECORD SET UP

Now set up the customer and enter the new Territory code in the 'Territory' field on the first screen. Go to the 'Tax' screen and enter the new Tax Authority Code in the 'Authcode' field.

Enter any exemption codes that apply if this customer has above ground tanks or is a permitted reseller.