Taxes

Introduction

The Taxes page is where taxes can be created to be attached to any sales made that are taxable. The importance of creating taxes is that they are automatically applied to a customer's invoice once the service is completed rather than having to do them all manually afterwards and erases the need for additional calculations. This page will walk through how to create taxes and how they can be applied to customers automatically if need be. To reach the Taxes page, click on the Admin Dropdown on the side menu, then click on Settings and then Taxes. Clicking on the three bars on the top left corner of the page will expand the side menu to allow for easier access

Taxes

When reaching the tax page, it will show with each tax created as a line item and with the following columns

- Name - The name of the tax
- Rate - The rate of the tax
- Rate Type - The Kind of rate such a percentage or per unit
- Fuel - The type of fuel getting taxed
- Description - A small description of the tax
- Status - Whether or not the tax is active or inactive
- Default - Setting a tax to default will make it so that it's applied to every account, even new ones
- Actions - Actions that can be taken on the tax such as
  - Edit - Clicking here will allow tax to be edited
  - Status - Clicking here allows for the status to be active or inactive
  - Trash - Clicking here will delete the tax

Adding Taxes

Adding Taxes is simple, in order to add one, click on the Add Tax button. Clicking on it will bring up the Add Tax Line Item popup and the following fields will need to be filled out

- Tax Name - Name of the tax being created
- Rate Type - Rate of the tax being created
- Rate Value - The Value of the rate

- Fuel - The specific fuels the tax applies too
- Description - A small description of the tax being created
- The Following can be toggled for taxes to be appplied
  - Fuel
  - Service
  - Subscriptions
  - Service plans
  - Propane Exchange
  - Default For New Locations - Toggling here allows for taxes to be applied to all locations created after enabling

After filling out all the fields and enabling the tabs to be taxed, clicking on the Create Tax button will add the tax item to be applied to sales going forward, clicking on cancel will close out the popup and all information will be deleted.

Editing Tax Item

Editing a tax line item is the same as adding one with the exception of hitting the edit button on the actions column on the tax line item that needs to be adjusted. The same popup as the Add Tax Line Item as seen above will popup and any fields that need to be edited can be edited here. Once finished updating, clicking on the Update Tax button will update the selected tax item with the new information and clicking on cancel will canel out any updates made on the popup.

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