Tax Class

Last Modified on 04/25/2024 10:14 am EDT

Pathway: *Setup > Accounting > Tax Class*

Tax Class Setup

Tax Class is a collection of taxes assigned to specific service codes, charge codes and surcharges. Creating a tax class involves two steps, adding a tax class and assigning tax class items. Before creating a tax class, verify all taxes it will include have been added to the system in *Setup > Accounting > Tax.*

Permissions

The following permissions are required to view, add and edit tax class:

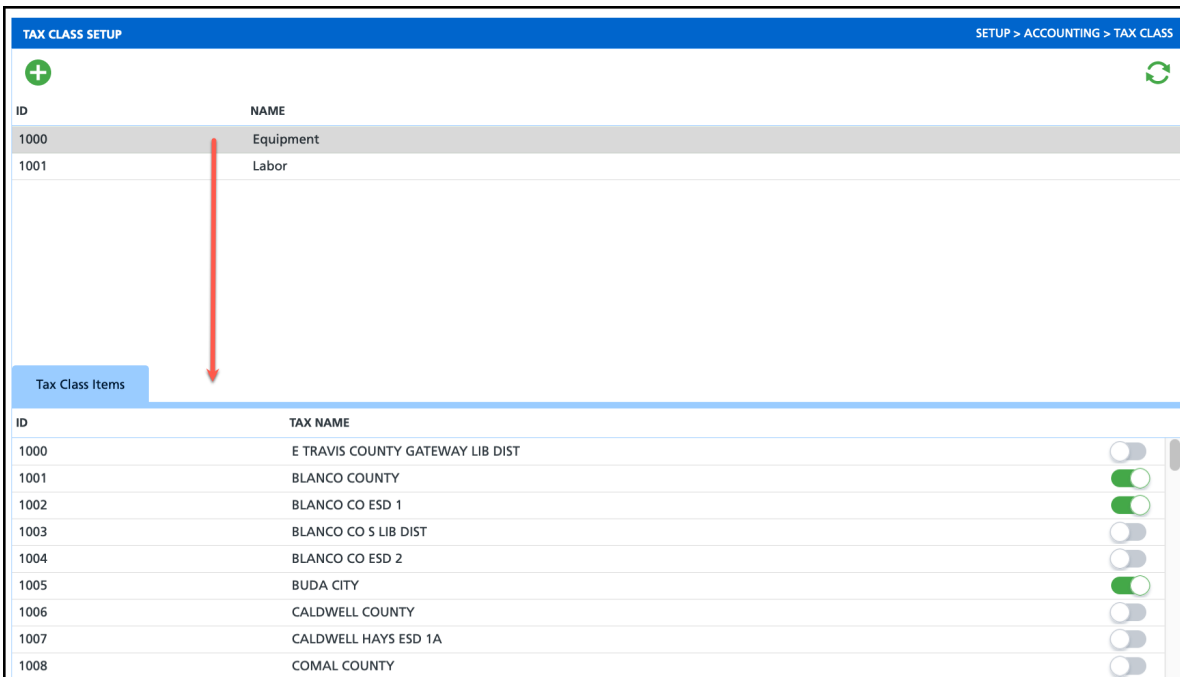| Permission ID	Permission Name
22	Setup \ Accounting

Add Tax Class
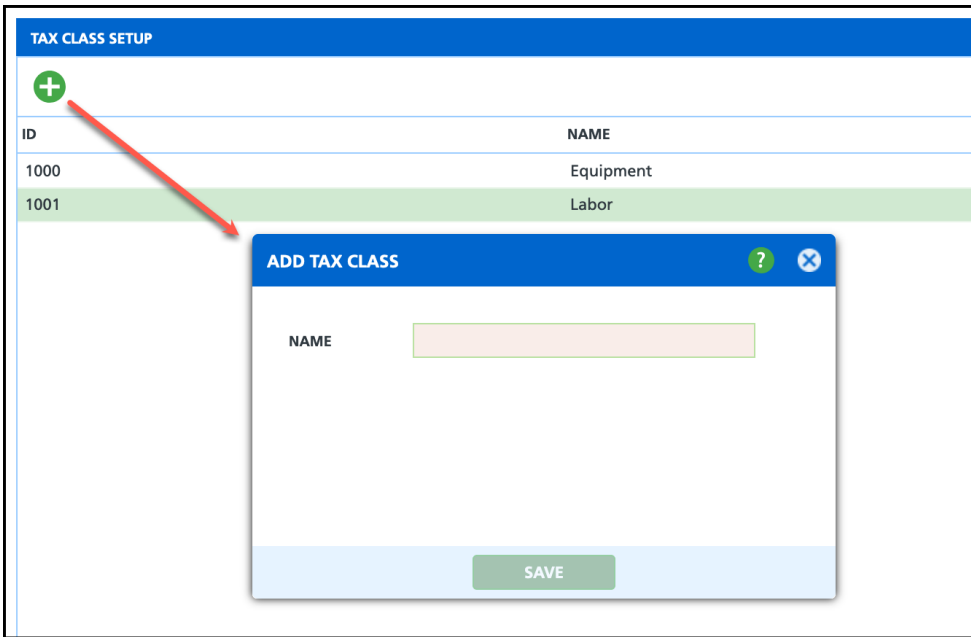
1. Select the **green +** icon to display the Add Tax Class editor.
2. Enter the **Name** of the tax class.
3. Select **Save**.

Add Tax Class Items

1. Select the tax class from the upper grid to display a list of taxes in the **Tax Class Items** grid.
2. Use the toggle buttons to add or remove a Tax Class Item to a Tax Class.