

HOW TO SET UP GST IN BILLING REGISTER
(IF YOU ARE IN AUSTRALIA)?



STEPS

Step 1: Set up Tax Registration Information

Step 2: Set Up Sale Taxes

Step 3: Set Up Sale Types

Database Path: E:\Billing Register - Koala Inc\Database_BR.accdb

01-07-2022 To 30-06-2023



Organization

- Click on the Statutory Master Data menu button

Refresh

Statutory Reports

Database Path: E:\Billing Register - Koala Inc\Database_BR.accdb

Financial Year 2022-2023
01-07-2022 To 30-06-2023

Change Financial
Year

About



Search forms here

Statutory Master Data

Financial Years

Organization

Click on the
Tax Registration
Information
button

Holidays :

Holiday Name


Date

Refresh

Check Invalid Records

Events/Reminders

Statutory Reports

Tax Registration Name	GSTIN	Active	<input checked="" type="checkbox"/>
Tax Registration Number		Tax Office Name And Address	
Tax Type	Indirect		
Sort Order	100		
Value Check Rule			

Click here
to Unlock
the form

Tax Registration Name

GSTIN

IEC

STN

TIN

VAT No

Tax Registration Name

GSTIN

Tax Registration Number

Tax Type

Indirect

Sort Order

100

Active

☒

Tax Office Name And Address

Value Check Rule

Record: 1 of 5

No Filter

Search

All

Start Text

End Text

These are sample Tax types provided in Billing Register.

Let's enter information in GSTIN and delete the other tax types.

TAX REGISTRATION INFORMATION

Tax Registration Name

GSTIN

+
-
🗑️
📄
🔄

Tax Registration Name

GSTIN

Tax Registration Number

45846621087

Tax Type

Indirect

Sort Order

100

Active

☒

Tax Office Name And Address

20 Jones Road, Mount Ommaney,
Queensland, Australia

Value Check Rule

?

Now the setup of Tax Registration Information is complete. Let's set up the Sale Taxes.

Record: 1 of 1

No Filter

Search

All Start Text End Text

▼

Organization

Statutory Reports

Holiday Name	Date	Refresh

Search forms here

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Customers

Purchases

Suppliers

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Sale Taxes

Sale Types

Purchase Types

Tax Groups

Tax Registration Information

Multi Sale Book Management

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General Settings

General Master Data

Organization

Click on
Sale Taxes
button

Holidays :

Holiday Name	Date	Refresh
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Check Invalid Records

Events/Reminders

Statutory Reports

Click here to Unlock the form

Record: 141No FilterSearchAllStart TextEnd Text

Tax Registration Name

Sale Tax Name

Short Code

Active☒Default☐Input Credit Disallowed☐

Tax Type

☒Main☐Cess☐Surcharge

Note: Cess/Surcharge selected here is calculable on Considerable Value.

Default Charging MethodPercentage

Default Tax Rate (%)

Default Considerable Value (%)0

By Default Applies OnSale Price

Include in Sale Price for Subsequent Tax Calculation☐

Sort Order100

Post To Sale/Purchase Types

Quick Changes To Item Category

Quick Changes To Items

Quick Changes To Additional Charges

Tax On Tax (Cess / Surcharge)

Note: Cess/Surcharge selected here is calculable on Tax Value.

Cess / Surcharge Name	Short Code	Type	Percentage	Load On Main Item Category
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Note: For any kind of tax change, please update Unit List Price (With Taxes) at Item level as required.

Accounting Ledger (For Inventory/Accounting Purpose)

^ For Sale Tax		CL	Set
^ For Purchase Tax		CL	Set
^ For Sale Tax Exemption Refund		CL	Set
^ For Purchase Tax Exemption Refund		CL	Set

Create Sub-Ledger based on Tax Percentage☒

SALE TAXES

+

+

+

+

+

Record: 14<<>>>>No FilterSearch

SearchAllStart TextEnd Text

Tax Registration Name

Sale Tax Name

Short Code

Active

☒

Default

☐

Input Credit Disallowed

☐

Tax Type

☒ Main☐ Cess☐ Surcharge

Note: Cess/Surcharge selected here is calculable on Considerable Value.

Default Charging Method

Percentage

Default Tax Rate (%)

Default Considerable Value (%)

0

By Default Applies On

Sale Price

Include in Sale Price for Subsequent Tax Calculation

☐

Sort Order

100

- Post To Sale/Purchase Types
- Quick Changes To Item Category
- Quick Changes To Items
- Quick Changes To Additional Charges

Tax On Tax (Cess / Surcharge) Note: Cess/Surcharge selected here is calculable on Tax Value.

	Cess / Surcharge Name	Short Code	Type	Percentage	Load On Main Item Category	
*			Cess	0	<input checked="" type="checkbox"/>	<div>Post To Item CategorySet Accounting LedgerDelete</div>

Accounting Ledger (For Inventory/Accounting Purpose)

^ For Sale Tax

CLSet

^ For Purchase Tax

CLSet

^ For Sale Tax Exemption Refund

CLSet

^ For Purchase Tax Exemption Refund

CLSet

Create Sub-Ledger based on Tax Percentage

☒

Set up whichever tax type is applicable for your region/country.

For this demo, we will add a new Sale Tax named 'GST' and configure it.

Note: For any kind of tax change, please update Unit List Price (With Taxes) at Item level as required.

Sale Tax	SC
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Create Sub-Ledger based on Tax Percentage ☒

Default Charging Method	Percentage	▼
Default Tax Rate (%)		
Default Considerable Value (%)		0
By Default Applies On	Sale Price	▼

Post To Sale/Purchase Types	Quick Changes To Item Category	Quick Changes To Items	Quick Changes To Additional Charges
-----------------------------	--------------------------------	------------------------	-------------------------------------

Note: Cess/Surcharge selected here is calculable on Tax Value.

Post To Item Category Set Accounting Ledger Delete

Note: For any kind of tax change, please update Unit List Price (With Taxes) at Item level as required.

SALE TAXES

+

+

+

+

+

+

Record: 141No FilterSearchAllStart TextEnd Text

Sale TaxSC

Tax Registration Name

Sale Tax Name

Short Code

Active☒Default

Tax Type☒Main

Note: Cess/Surcharge selected here

Default Charging Method

Default Tax Rate (%)

Default Considerable Value (%)

By Default Applies On

Include in Sale Price for Subsequent Sales

Sort Order

Post To Sale/Purchase Type

Tax On Tax (Cess / Surcharge)

Cess / Surcharge Name

Accounting Ledger (For Inventory/Accounting Purpose)

CLSet

CLSet

CLSet

CLSet

CLSet

CLSet

Quick Changes To Additional Charges

Post To Item Category

Set Accounting Ledger

Delete

Add Sale Tax

ADD SALE TAX

Tax Registration Name

Sale Tax Name

Short Code

Input Credit Disallowed☐

Default Charging MethodPercentage

Default Tax Rate (%)

Default Considerable Value (%)100

By Default Applies OnSale Price

Post tax value into existing Item Categories/Items☐

Post tax value into existing Additional Charges☐

Applicable for Sale/Purchase Types

>Select

☐Cash Sale to Business

☒Cash Sale to Consumer

☐Credit Sale to Business

☐Credit Sale to Consumer

AddCancel

Note: For any kind of tax change, please update Unit List Price (With Taxes) at Item level as required.

SALE TAXES

The screenshot shows the 'ADD SALE TAX' dialog box in the software. The dialog box is titled 'ADD SALE TAX' and contains the following fields and options:

- Tax Registration Name:** GSTIN
- Sale Tax Name:** GST
- Short Code:** GST
- Input Credit Disallowed:** ☐
- Default Charging Method:** Percentage
- Default Tax Rate (%):** 10
- Default Considerable Value (%):** 100
- By Default Applies On:** Sale Price
- Post tax value into existing Item Categories/Items:** ☐
- Post tax value into existing Additional Charges:** ☐
- Applicable for Sale/Purchase Types:**
 - >Select Sale/Purchase Type
 - ☐ Cash Sale to Business
 - ☒ Cash Sale to Consumer
 - ☐ Credit Sale to Business
 - ☒ Credit Sale to Consumer

The 'Add' button is highlighted with a red arrow.

Note: For any kind of tax change, please update Unit List Price (With Taxes) at Item level as required.

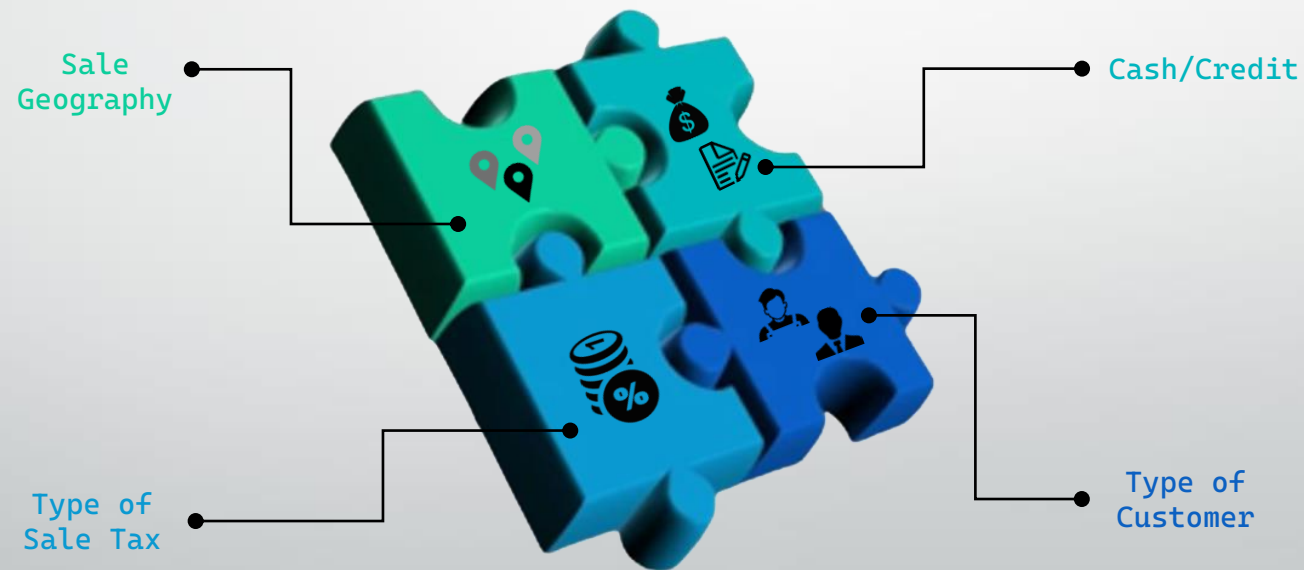
SIGNIFICANCE OF SALE TYPES IN BILLING REGISTER

Sale Types form a very crucial component of Billing Register.

A Sale Type acts as a bridge between Sale Geography, Cash/Credit, Type of Customer, and Type of Sale Tax.

It combines multiple factors in determining invoice format, contents of the invoice, paper size of the invoice and taxes to be applied on a sale.

Hence, it is important that you set up Sale Types before using Billing Register to make a sale.



Organization

Click on the
Statutory
Master Data
menu button

Statutory Reports

Search forms here

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Customers

Purchases

Suppliers

Inventory

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Holidays :

Holiday Name	Date	Refresh
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Check Invalid Records

Events/Reminders

Statutory Reports

Click on the
Sale Types
button

SALE TYPES

Click here to Unlock the form

Sale Type

Cash Sale to Consumer

Cash Sale to Consumer

Cash Sale to Consumer

Cash Sale to Consumer

Export

Basic Details

Miscellaneous

Report Options

Report Header/Footer

Report Additional Texts

Sale Type

Cash Sale to Consumer

Short Code

Cash B2C

Active

☒

Default

☒

Sort Order

100

Sale Geography

Local (Intra-Country)

Enable Special Geography

☐

Payment Method

☒ Cash Sale

☐ Credit Sale

Buyer Info. Required

☐

Sale To Registered Dealer

☐

Buyer Tax Info. Required

☐

Default Place of Supply For Tax Calculation

☒ Shipping/Service Address (When available). Except when Bill-To Ship-To Transaction

☐ Billing Address

Default Business Section

Required Licenses / Certificates

Name

Sale Item Level Primary Note

Internal Note

Supply Type

Supply

Payment Term

Default Sale Order Validity

Days

Create Sale Sub-Ledger based on Sale Type

☒

Prefix For Ledger Creation

Suffix For Ledger Creation

(Local Cash Sale To Consumer)

Applicable Taxes On Sale

^ Tax Name

GST

Delete

Taxes Are Subjected To Reverse Charge

☐

Taxes Are Subjected To Exemption

☐

Only taxes matching between Item and Sale Type will load in Sales.

Primary Pricing

☐ Inclusive Of All Taxes

☒ Exclusive Of All Taxes

Show Tax Summary On Report

☒

Tax Format

General

Record: 1 of 5

No Filter

Search

Search

All

Start Text

End Text

Sale Type



You may refer to the Help Docs section of our website for detailed instructions on 'How to Set Up Sale Types in Billing Register?'