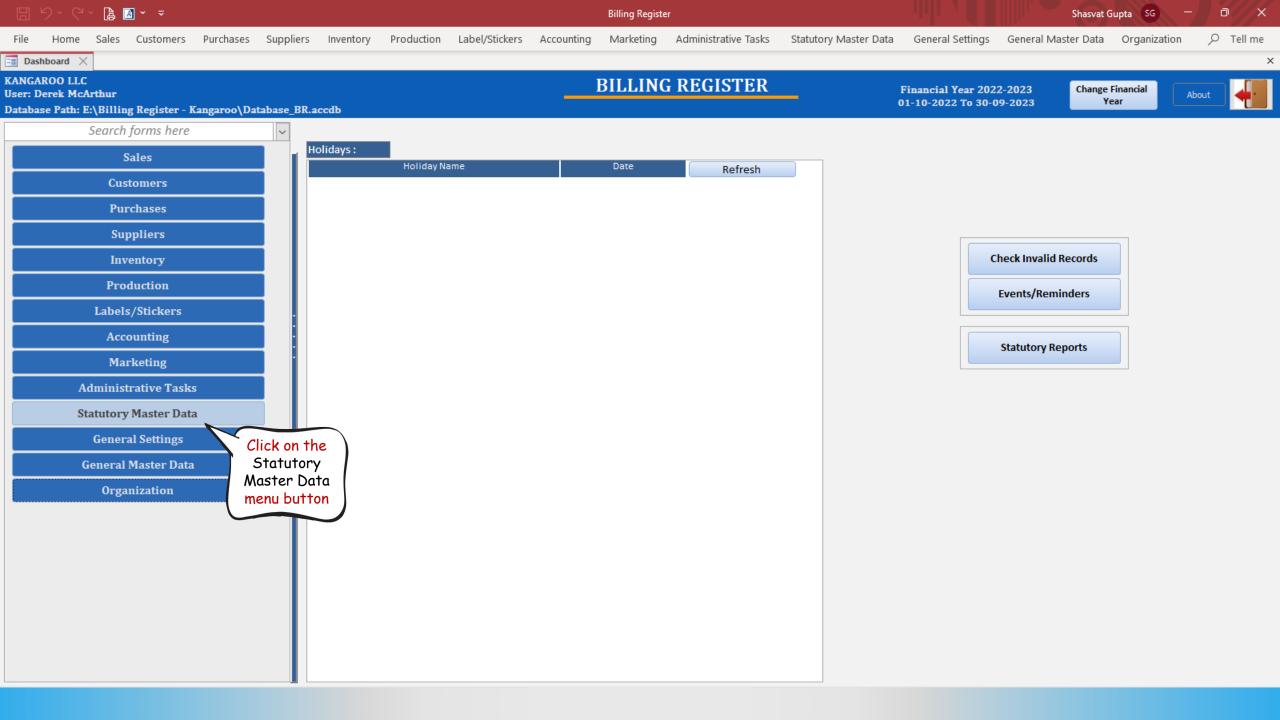# HOW TO SET UP SALES TAX IN BILLING REGISTER (IF YOU ARE IN THE USA)?

STEPS

Step 1: Set up Tax Registration Information

Step 2: Set Up Sale Taxes

Step 3: Set Up Sale Types

Shasvat Gupta   SG

Dashboard

KANGAROO LLC
User: Derek McArthur
Database Path: E:\Billing Register - Kangaroo\Database_BR.accdb

BILLING REGISTER

Financial Year 2022-2023
01-10-2022 To 30-09-2023

Change Financial Year

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| Inventory |
| Production |
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| Accounting |
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| Statutory Master Data |
| General Settings |
| General Master Data |
| Organization |

Holidays :

Holiday Name	Date	Refresh

Check Invalid Records

Events/Reminders

Statutory Reports

Click on the Statutory Master Data menu button

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Dashboard

KANGAROO LLC
User: Derek McArthur
Database Path: E:\Billing Register - Kangaroo\Database_BR.accdb

BILLING REGISTER

Financial Year 2022-2023
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Sale Taxes

Sale Types

Purchase Types

Tax Groups

Tax Registration Information

Multi Sale Book Management

Financial Years

General Settings

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Organization

Click on the Tax Registration Information button

TAX REGISTRATION INFORMATION

Tax Registration Name

GSTIN

Tax Registration Name	GSTIN
Tax Registration Number	
Tax Type	Indirect
Sort Order	100

Active ☑

Tax Office Name And Address

Value Check Rule

Click here to Unlock the form

Record: 1 of 5   No Filter   Sea

Search   ● All   ○ Start Text   ○ End Text

File   Home   Sales   Customers   Purchases   Suppliers   Inventory   Production   Label/Stickers   Accounting   Marketing   Administrative Tasks   Statutory Master Data   General Settings   General Master Data   Organization   Tell me

Dashboard   Tax Registration Information

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Shasvat Gupta

TAX REGISTRATION INFORMATION

Tax Registration Name
GSTIN
IEC
STN
TIN
VAT No

Tax Registration Name	GSTIN

Active ☑

Tax Registration Number	

Tax Office Name And Address	

Tax Type	Indirect

Sort Order	100

Value Check Rule	

These are sample Tax types provided in Billing Register.
Let's rename STN to Sales Tax Number (for clarity), enter
information into it and delete the other tax types.

Record: 1 of 5   No Filter   Sear

Search   ● All   ○ Start Text   ○ End Text

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File   Home   Sales   Customers   Purchases   Suppliers   Inventory   Production   Label/Stickers   Accounting   Marketing   Administrative Tasks   Statutory Master Data   General Settings   General Master Data   Organization   Tell me

Dashboard   Tax Registration Information

TAX REGISTRATION INFORMATION

Tax Registration Name
GSTIN
IEC
STN
TIN
VAT No

Tax Registration Name	STN
Tax Registration Number	
Tax Type	Indirect
Sort Order	100

Active ☐

Tax Office Name And Address

Value Check Rule

Record: 3 of 5   No Filter   Sea

Search   ⦿ All   ○ Start Text   ○ End Text

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File | Home | Sales | Customers | Purchases | Suppliers | Inventory | Production | Label/Stickers | Accounting | Marketing | Administrative Tasks | Statutory Master Data | General Settings | General Master Data | Organization | Tell me

Dashboard   Tax Registration Information

TAX REGISTRATION INFORMATION

Tax Registration Name
GSTIN
IEC
Sales Tax Number
TIN
VAT No

Tax Registration Name	Sales Tax Number
Tax Registration Number	32027714172
Tax Type	Indirect
Sort Order	100

Active	☐
Tax Office Name And Address	1500 County Rd #1, Dunedin, Florida 34698, USA

Value Check Rule		?

Record: |◄ ◄ 3 of 5 ► ►| ►* | No Filter | Sear

Search | ● All ○ Start Text ○ End Text

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Dashboard   Tax Registration Information

TAX REGISTRATION INFORMATION

Tax Registration Name
Sales Tax Number

Tax Registration Name	Sales Tax Number
Tax Registration Number	32027714172
Tax Type	Indirect
Sort Order	100

Active	☑
Tax Office Name And Address	1500 County Rd #1, Dunedin, Florida 34698, USA

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   Sear

Search   ● All   ○ Start Text   ○ End Text

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BILLING REGISTER

KANGAROO LLC
User: Derek McArthur
Database Path: E:\Billing Register - Kangaroo\Database_BR.accdb

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Purchases

Suppliers

Inventory

Production

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Purchase Types

Tax Groups

Tax Registration Information

Multi Sale Book Management

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Click on Sale Taxes button

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File | Home | Sales | Customers | Purchases | Suppliers | Inventory | Production | Label/Stickers | Accounting | Marketing | Administrative Tasks | Statutory Master Data | General Settings | General Master Data | Organization | Tell me

Dashboard | Sale Taxes

SALE TAXES

Sale Tax	SC

Click here to Unlock the form

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.

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 ☑

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

Record: I◄ ◄ ► ►I ►* 🔲 No Filter Sea

Search ⦿ All ◯ Start Text ◯ End Text

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

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File   Home   Sales   Customers   Purchases   Suppliers   Inventory   Production   Label/Stickers   Accounting   Marketing   Administrative Tasks   Statutory Master Data   General Settings   General Master Data   Organization   Tell me

Dashboard   Sale Taxes

SALE TAXES

Sale Tax	SC

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.

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   ☑

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	☑	Post To Item Category	Set Accounting Ledger	Delete

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

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

Record: No Filter   Sear

Search   ● All   ○ Start Text   ○ End Text

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

SALE TAXES

Sale Tax	SC

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.

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 ☑

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	☑	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.

Record: No Filter Sear

Search ⦿ All ○ Start Text ○ End Text

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SALE TAXES

Sale Tax	SC

Tax Registration Name

Accounting Ledger (For Inventory/Accounting Purpose)

Sale Tax Name

Short Code

Active ☑   Default

Tax Type ◉ Main

Note: Cess/Surcharge selected here

CL Set
CL Set
CL Set
CL Set

☑

Default Charging Method

Default Tax Rate (%)

Default Considerable Value (%)

By Default Applies On

Include in Sale Price for Subseque

Sort Order

Post To Sale/Purchase Typ

Quick Changes To Additional Charges

Tax On Tax (Cess / Surcharge)

	Cess / Surcharge Name

ADD SALE TAX

Add Sale Tax   ✕

Field	Value
Tax Registration Name	⌄
Sale Tax Name	
Short Code	
Input Credit Disallowed	☐
Default Charging Method	Percentage ⌄
Default Tax Rate (%)	
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

Add   **Cancel**

Main ategory

Post To Item Category   Set Accounting Ledger   Delete

Record: No Filter   Sear

Search   ◉ All   ○ Start Text   ○ End Text

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

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Dashboard | Sale Taxes

SALE TAXES

Sale Tax	SC

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 Subseque

Sort Order

Post To Sale/Purchase Ty

Tax On Tax (Cess / Surcharge)

Cess / Surcharge Name

Accounting Ledger (For Inventory/Accounting Purpose)

CL Set
CL Set
CL Set
CL Set

tage ☑

Quick Changes To Additional Charges

Main ategory

Post To Item Category | Set Accounting Ledger | Delete

ADD SALE TAX

Add Sale Tax	✕

Tax Registration Name	Sales Tax Number ▾
Sale Tax Name	Sales Tax
Short Code	ST
Input Credit Disallowed	☐
Default Charging Method	Percentage ▾
Default Tax Rate (%)	8.81
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

Add | Cancel

Record: ◄ ◄ ► ►► No Filter Sear

Search ◉ All ○ Start Text ○ End Text

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

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File | Home | Sales | Customers | Purchases | Suppliers | Inventory | Production | Label/Stickers | Accounting | Marketing | Administrative Tasks | Statutory Master Data | General Settings | General Master Data | Organization | Tell me

Dashboard | Sale Taxes

SALE TAXES

Sale Tax	SC
Sales Tax	ST

Tax Registration Name	Sales Tax ▾
Sale Tax Name	Sales Tax
Short Code	ST
Active	☑	Default	☐	Input Credit Disallowed	☐
Tax Type	⦿ Main ◯ Cess ◯ Surcharge

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

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 ☑

Default Charging Method	Percentage ▾
Default Tax Rate (%)	8.81
Default Considerable Value (%)	100
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	☑	Post To Item Category	Set Accounting Ledger	Delete

Record: ⏮ ◀ 1 of 1 ▶ ⏭ ⛒ No Filter | Sea

Search ⦿ All ◯ Start Text ◯ End Text

Sale Taxes are now set up. Let's set up Sale Types now.

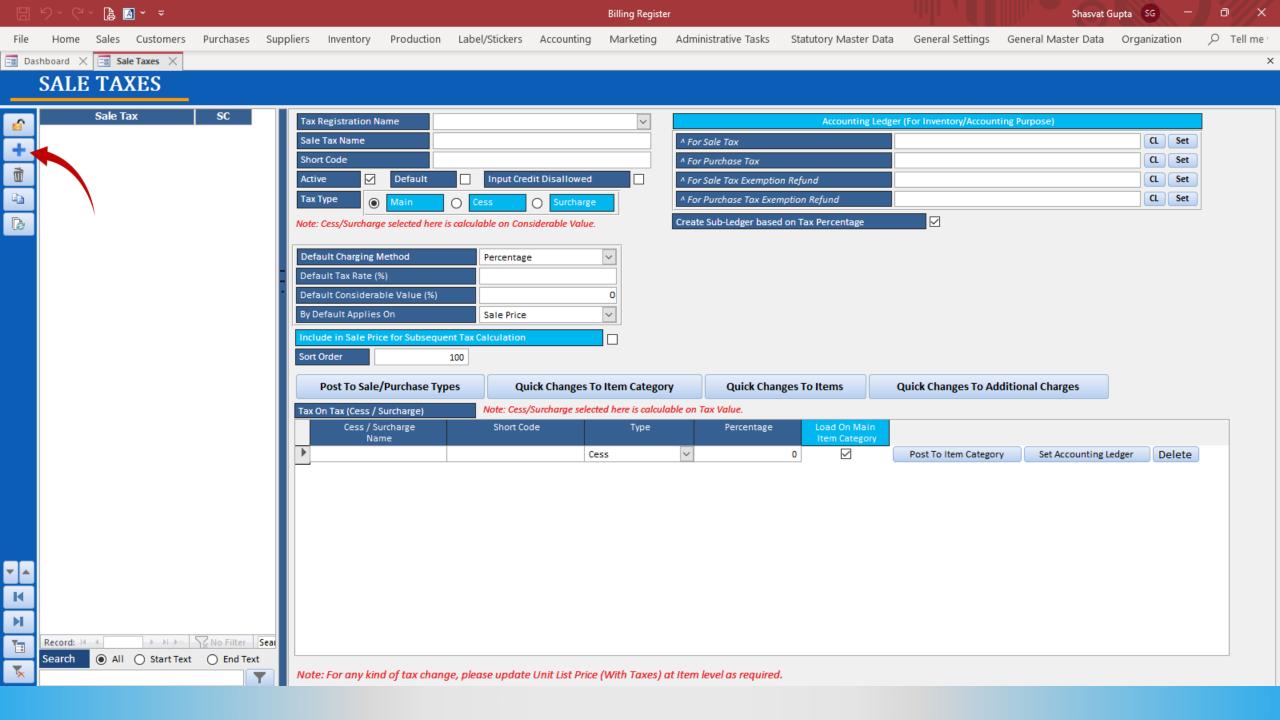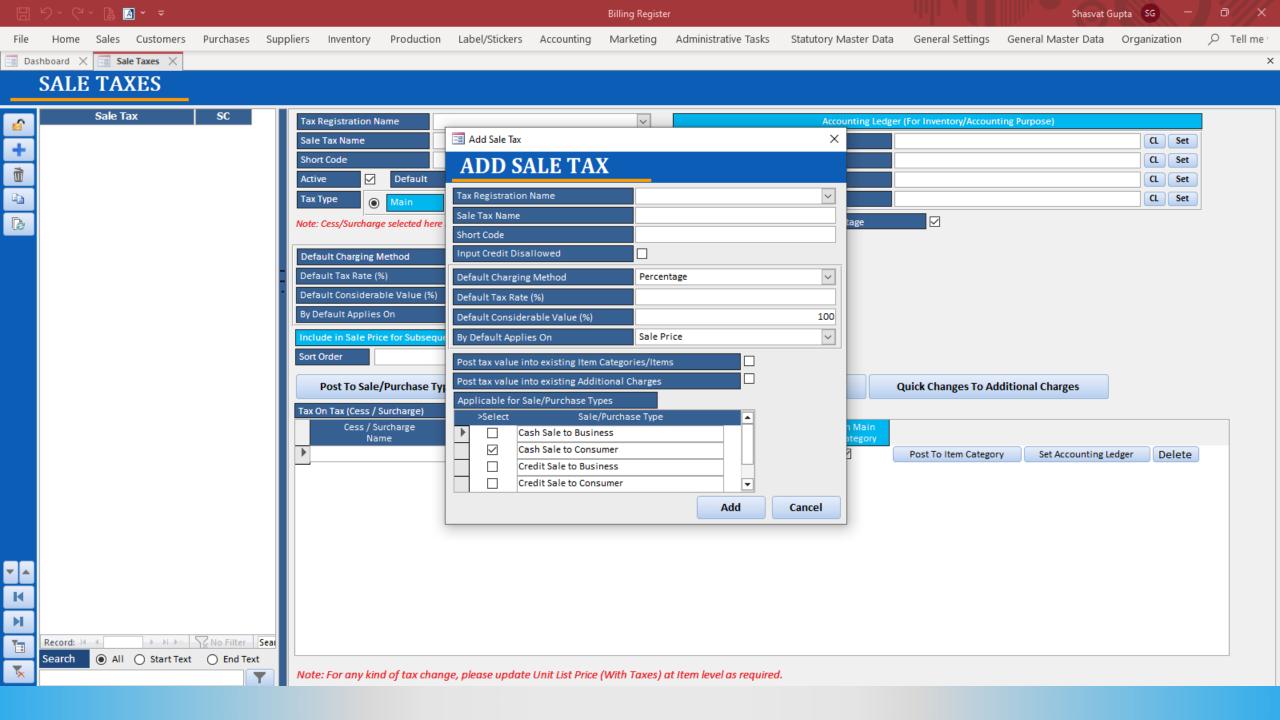*Note: For any kind of tax change, please update Unit List Price (With Taxes) at Item level as required.*

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.

Sale Geography

Cash/Credit

Type of Sale Tax

Type of Customer

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BILLING REGISTER

KANGAROO LLC
User: Derek McArthur
Database Path: E:\Billing Register - Kangaroo\Database_BR.accdb

Financial Year 2022-2023
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Holidays :

Holiday Name	Date	Refresh

Check Invalid Records

Events/Reminders

Statutory Reports

Click on the Statutory Master Data menu button

BILLING REGISTER

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Holidays :

Holiday Name	Date	Refresh

Check Invalid Records

Events/Reminders

Statutory Reports

Click on the Sale Types button

Shasvat Gupta   SG

File   Home   Sales   Customers   Purchases   Suppliers   Inventory   Production   Label/Stickers   Accounting   Marketing   Administrative Tasks   Statutory Master Data   General Settings   General Master Data   Organization   🔍 Tell me

Dashboard   Sale Types

SALE TYPES

Sale Type
Cash Sale to Consumer

Click here to Unlock the form

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
Sales Tax

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   Show Tax Summary On Report ☑
◉ Exclusive Of All Taxes   Tax Format   General

Record: 1 of 5   No Filter   Search

Search   ◉ All   ○ Start Text   ○ End Text

Shasvat Gupta SG

Dashboard   Sale Types

SALE TYPES

Sale Type

Sale Type
Cash Sale to Consumer
Cash Sale to Business
Credit Sale to Business
Credit Sale to Consumer
Export

This is the default list of Sale Types in Billing Register. This list is specific for your country and type of business.

| 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

Supply Type | Supply
Payment Term |
Default Sale Order Validity | | Days

Sale Geography
Local (Intra-Country)
Enable Special Geography ☐

Payment Method
◉ Cash Sale
○ Credit Sale
Buyer Info. Required ☐

Create Sale Sub-Ledger based on Sale Type ☑
Prefix For Ledger Creation |
Suffix For Ledger Creation | (Local Cash Sale To Consumer)

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 |
| * | | Delete |

Sale Item Level Primary Note | Internal Note

Applicable Taxes On Sale

^ Tax Name	
▶ Sales Tax	Delete
*	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   Show Tax Summary On Report ☑
◉ Exclusive Of All Taxes   Tax Format | General

Record: |◀ ◀ 1 of 5 ▶ ▶| ▶*   No Filter   Search
Search   ◉ All   ○ Start Text   ○ End Text

File | Home | Sales | Customers | Purchases | Suppliers | Inventory | Production | Label/Stickers | Accounting | Marketing | Administrative Tasks | Statutory Master Data | General Settings | General Master Data | Organization | Tell me

Dashboard | Sale Types

SALE TYPES

Sale Type

Sale Type
Cash Sale to Consumer
Cash Sale to Business
Credit Sale to Business
Credit Sale to Consumer
Export

| Basic Details | Miscellaneous | Report Options | Report Header/Footer | Report Additional Texts |

Basic Details

Sale Type: Cash Sale to Consumer
Short Code: Cash B2C
Active: ☑   Default: ☑   Sort Order: 100

Sale Geography
Local (Intra-Country)
Enable Special Geography ☐

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
*
Delete

Sale Item Level Primary Note: Internal Note

Payment Method
◉ Cash Sale
○ Credit Sale
Buyer Info. Required ☐

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	
▶ Sales Tax	Delete
*	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   Show Tax Summary On Report ☑
◉ Exclusive Of All Taxes   Tax Format: General

Please configure the Sale Types as per your specific needs.

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

Record: 1 of 5   No Filter   Search
Search   ◉ All   ○ Start Text   ○ End Text