

# HLMSW: Making changes to the USA Tax Rates

Note this tutorial requires HLMSW version 3.6 or later.


## Step 1: Check Current Status

Before making any changes to a tax value, you should first check to see if you have any existing clients that require this tax rate.

The screenshot shows the 'Edit Window (F7)' with the 'Account' tab selected. The 'Detail' sub-tab is active. The 'City' field is set to 'La Mesa' and the 'State' field is set to 'CA'. The 'SEARCH MODE' label is visible on the left side of the window.

If NO Clients are found, create a NEW entry and enter the values in the City and State fields, otherwise select an existing client and EDIT it.

## Step 2: Enter the Select Tax Rate Screen

On the Detail tab click on the Tax Search Icon  to enter into the Select Tax Rate Screen (you may need to press it twice)

The screenshot shows the 'Edit Window (F7)' with the 'Detail' tab selected. The 'Tax Code' field is set to 'SAND=San Diego' and the 'Tax Number' field is set to '8.75%'. A 'Tax Search Icon' is visible next to the 'Tax Number' field.

### Step 3: Select the correct City and Rate

**Select Tax Rate**

Input Values  
 G. Schirmer Inc. U.S.A.  
 City: La Mesa CA Postcode: 92041

Tax Item Properties  
 Company: \*\*All Companies\*\*  
 Country: U.S.A.  
 City: La Mesa  
 State: CA  
 Postcode:

Tax Code Properties  
 Name: San Diego  
 Code: SAND Value: 8.750%

Oswego (Fulton) [N3551]  
 Otsego [N3621] 8.00%  
 PLACER [PLAC] 8.25%  
 Plumas [PLUMA] 8.25%  
 Putnam [N3711] 8.38%  
 Rensselaer [N3881] 8.00%  
 RIVERSIDE [RIVER] 8.75%  
 Rockland [N3911] 8.38%  
 Resno(Freedley) [PRESN]  
 Sacramento [SACRA] 8.75%  
 SAN BENITO [SANB] 8.25%  
 San Benito (San Juan Ba)  
 San Benito(hollister) [SAN]  
 SAN BERNARDINO [SAN]  
 SAN BERNARDINO(MON)  
 San Diego [SAND] 8.75%  
 San Diego (El Cajon) [SAN]

Buttons: Select Tax Rate, Cancel

If HLMSW can find the city (and there is only one), the screen will look like the above, otherwise a list of cities will be displayed.

**Select Tax Rate**

Input Values  
 G. Schirmer Inc. U.S.A.  
 City: La Mesa CA Postcode: 92041

Refresh List

Sort By Tax Code

Tax Item Properties  
 Company: \*\*All Companies\*\*  
 Country: U.S.A.  
 City: Lamont  
 State: CA  
 Postcode:

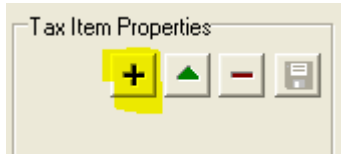
Tax Code Properties  
 Name: Kern  
 Code: KERN Value: 8.250%

Code	City	State	Postco
San Joaquin (8.75%)	Acampo	CA	
Los Angeles (9.25%)	Acton	CA	
SAN LUIS OBISPO (8.25%)	Adelaida	CA	
SAN BERNARDINO (8.75%)	Adelanto	CA	
Modoc (8.25%)	Adin	CA	
Los Angeles (9.25%)	Agoura Hills	CA	
SONOMA (9.00%)	Agua Caliente	CA	
San Diego (8.75%)	Agua Caliente Springs	CA	
Los Angeles (9.25%)	Agua Dulce	CA	
RIVERSIDE (8.75%)	Aguanga	CA	
Madera (8.75%)	Ahwahnee	CA	
El Dorado (8.25%)	Al Tahoe	CA	
Alameda (9.75%)	Alameda	CA	
Contra Costa (9.25%)	Alamo	CA	
Alameda (9.75%)	Alhambra	CA	

Buttons: Select Tax Rate, Select Tax Rate AND City, Cancel

## Step 4: Select or ADD the City Details


When a list is presented, you should either find the correct City in the list, and if you are sure it is not there, you can add a new **Tax Item** by selecting the ADD Button in the Tax Code Properties Screen

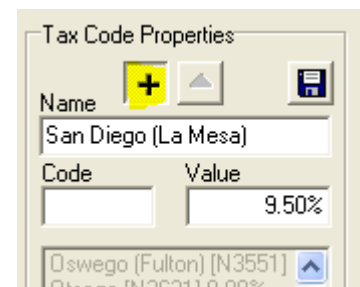



**NOTE: BEFORE YOU ADD A NEW TAX ITEM YOU SHOULD ADD THE TAX CODE FIRST IF IT IS NOT ALREADY IN THE SYSTEM**

## Step 5: ADD or EDIT the Tax Code (if required)



If the Tax Code you require is NOT in HLMSW, then select the ADD Tax Code button. Enter the Name, usually in the format *County (City)* and

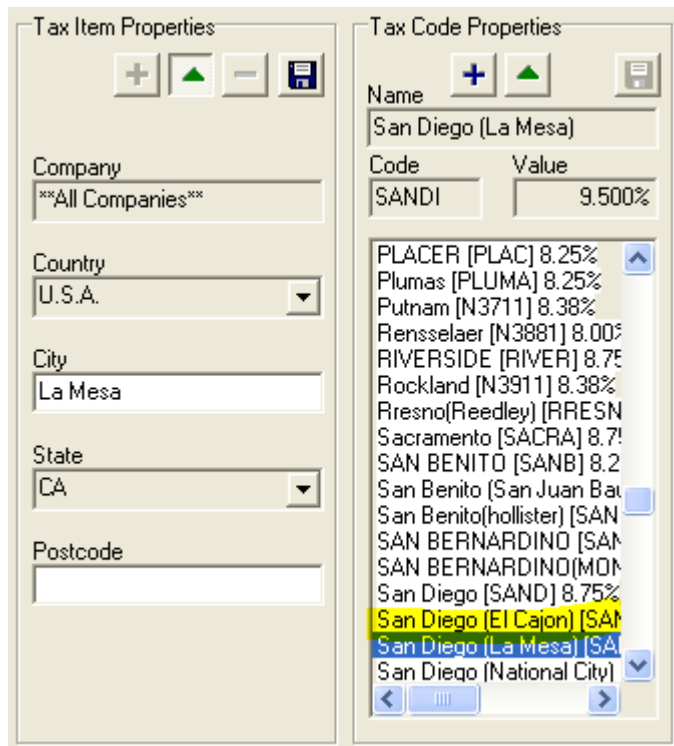
the new percentage Value followed by the save key . When prompted *Do you wish to associate this Tax Code with this Tax Item?* Answer YES.



If the Tax Code is already displayed, then you can edit the Details using the EDIT  key.



## Step 6: Change the Tax Code (if required)

If the WRONG tax code is displayed against a Tax Item, edit the Tax Item using the  key and select the correct tax code from the list and press the  key.



The image shows two side-by-side windows. The left window is titled 'Tax Item Properties' and contains the following fields: Company (\*\*\*All Companies\*\*), Country (U.S.A.), City (La Mesa), State (CA), and Postcode. The right window is titled 'Tax Code Properties' and contains: Name (San Diego (La Mesa)), Code (SANDI), and Value (9.500%). Below these fields is a list of tax codes with their respective values, including PLACER [PLAC] 8.25%, Plumas [PLUMA] 8.25%, Putnam [N3711] 8.38%, Rensselaer [N3881] 8.00%, RIVERSIDE [RIVER] 8.75%, Rockland [N3911] 8.38%, Resno(Reedley) [RRESN], Sacramento [SACRA] 8.75%, SAN BENITO [SANB] 8.25%, San Benito (San Juan Ba), San Benito(hollister) [SAN], SAN BERNARDINO [SAN], SAN BERNARDINO(MON), San Diego [SAND] 8.75%, San Diego (El Cajon) [SA], San Diego (La Mesa) [SA], and San Diego (National City). The 'San Diego (El Cajon) [SA]' entry is highlighted in yellow.

## Step 7: Save the Tax changes

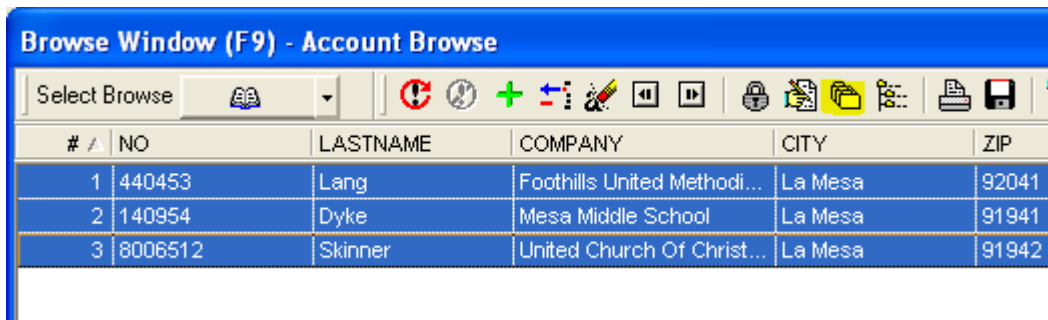
While the tax code changes have now been saved, use the  button to just select the tax rate, OR the  if you want also to correct the account's City entry to match the City entered in this screen.

If you are editing an existing account, then SAVE your changes, otherwise you may cancel the entry of the new account (the tax changes have already been saved).

## Step 8: Change other accounts

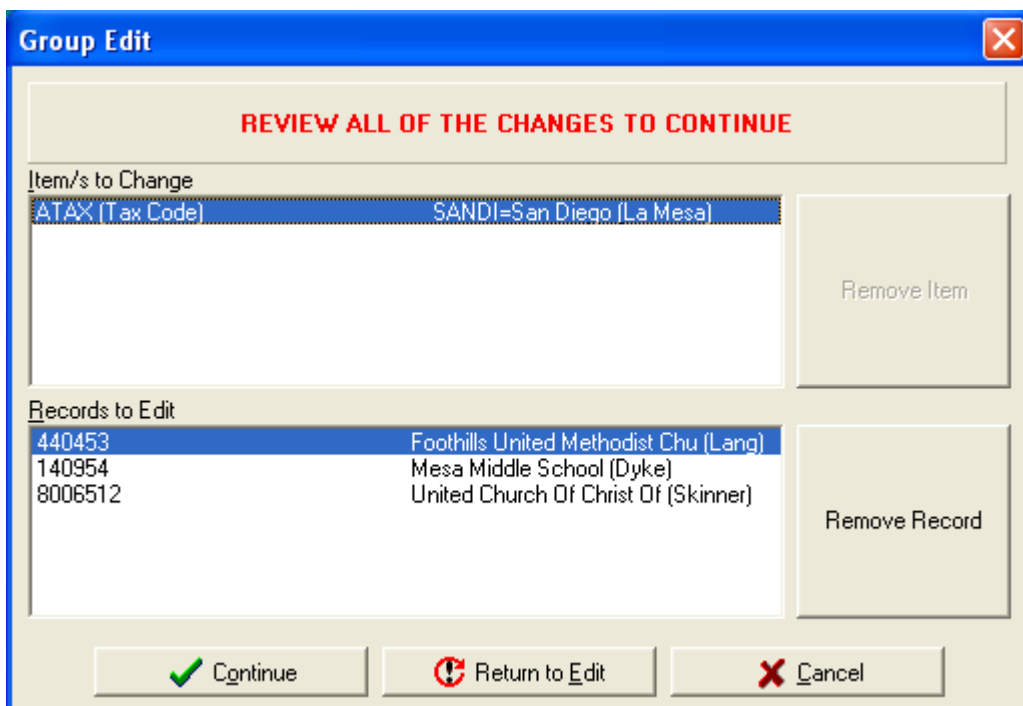
If only the tax rate was changed, all accounts will now reflect the new tax rate. If you added a NEW tax rate, then you should also now change all of the accounts from the same locale to the new tax rate. The easiest way to do this is with the Group Edit feature using the items found in Step 1.

Select all of the accounts to change by holding the Control Key while selecting the browse lines (or with the SHIFT key to select a range of items) and press the Group Edit button.



#	NO	LASTNAME	COMPANY	CITY	ZIP
1	440453	Lang	Foothills United Methodi...	La Mesa	92041
2	140954	Dyke	Mesa Middle School	La Mesa	91941
3	8006512	Skinner	United Church Of Christ...	La Mesa	91942

Select the correct Tax code from the list (it helps if you can remember the 5-digit code) and press F10 to save the changes.



**Group Edit**

**REVIEW ALL OF THE CHANGES TO CONTINUE**

Item/s to Change

ATAX (Tax Code)	SANDI=San Diego (La Mesa)
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Remove Item

Records to Edit

440453	Foothills United Methodist Chu (Lang)
140954	Mesa Middle School (Dyke)
8006512	United Church Of Christ Of (Skinner)

Remove Record

Continue     Return to Edit     Cancel



If the Group Edit screen, make sure that the correct Tax Code and Records are displayed and press on the Continue button and the Yes to All to save the changes to all accounts.

## How to Make Multiple Tax Rate changes

Follow the steps 1 and 2.

When the Tax Rate window is displayed, CLEAR any value in the CITY column and check the *Sort by Tax Code* option and the screen should look like this:

Code	City	State	Postcode
Alameda (9.75%)	Alameda	CA	
Alameda (9.75%)	Albany	CA	
Alameda (9.75%)	Army Terminal	CA	
Alameda (9.75%)	Ashland	CA	
Alameda (9.75%)	Berkeley	CA	
Alameda (9.75%)	Bradford	CA	
Alameda (9.75%)	Castro Valley	CA	
Alameda (9.75%)	Cresta Blanca	CA	
Alameda (9.75%)	Dublin	CA	
Alameda (9.75%)	Elmwood	CA	
Alameda (9.75%)	Emeryville	CA	
Alameda (9.75%)	Fremont	CA	
Alameda (9.75%)	Government Island	CA	
Alameda (9.75%)	Hayward	CA	
Alameda (9.75%)	Haver	CA	

Now scroll through the list and when you come across a Tax Code that must be edited, on the *Tax Code Properties* screen click on the Edit Button  to edit, enter the new rate and click on the save Button  to commit the changes. Repeat the process for all of the rates and when finished, exit from this screen (the tax changes have already been made).

Name	Code	Value
Alameda	ALAME	9.750%

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Last Updated: Saturday, 16 May 2009