New Automated Sales Tax Center

The new Sales Tax Center's features include:

Accounting Method

The Automated Sales Tax (AST) center now displays your tax liability in either Accrual or Cash basis accounting. The taxes are displayed based on the accounting method you have chosen in your company settings.

Breakout of Taxes Due

Taxes are separated into three sections:

- Due This Month: All taxes that require more immediate action.
- Upcoming: Tax amounts being accrued for the following period.
- Past Due: Taxes in which the due date has passed, and no tax payment has been recorded within the QuickBooks account.

Note: You can view monthly return dues by using the Filter. Select the start and end of the month to see the transactions.

Return Summary and Recording Tax Payments

Each tax listed has a Start Return button next to it. Selecting this button takes you to a Return summary for this particular tax.

This summary gives you the information you'll need to file a tax form directly with the tax agency. This includes total sales, taxable sales, non-taxable sales, and tax amounts due.

The Return summary also lets you add a tax adjustment (if needed):

1. From the dropdown menu, choose the reason for the adjustment.
2. Select the account to apply the adjustment from a dropdown menu that will change based on the reason selected.
3. Add the amount of the adjustment.
4. Select Record payment.

Note: This allows you to enter the payment amount, date and account for the payment to be applied to this particular return.

Review the final summary, then close the window. This will remove the return screen and add it to the History tab.

Note: This action only records the payment in QuickBooks and updates your liability account. But it doesn't make a payment or transfer any money anywhere. You'll need to make the payment directly to the tax agency.

Need to record tax adjustment in old tax center? If you are an Accounting Analytics clients, contact us to record tax adjustment in the old tax center.

History Tab: View and Delete Prior Returns and Payments

On the top right of the tax page, you can find the History link. Select it to review any returns previously marked as paid or filed using the Automated Sales Tax.

Note: To see tax payments made before migrating to this system, view your Transactions List Report and filter by Sales Tax Payments to see all payments made for a given time period.

Delete prior returns and payments:

1. Select View Return next to the period in which you need to delete the payment.
2. Choose the payment date for the payment you wish to delete
3. Select Delete.
4. Choose Delete again on the confirmation screen.

Note: Your tax return for the payment will no longer appear on the History tab but will instead be moved back to the Sales Taxes Due.

Sales Tax Settings

On the top right of the sales tax screen, you'll see Sales Tax Settings link. This lets you view and edit any tax agencies you have set up within your QuickBooks account and also lets you add new agencies.

Select the Edit button to update tax agencies.

Reports

On the top right of the sales tax screen, you'll see Reports link. This lets you view the Sales Tax Liability Report and the Taxable Customers Reports.

You still find all other reports by selecting the Reports tab from the left menu.

Email Reminders

- If you're the Master Administrator and Automated Sales Tax is turned on, you'll receive an email reminding you of the upcoming taxes.

- Reminders are sent out based on the filing frequency (monthly, quarterly, annual) for the associated sales tax.
- The first reminder is emailed out on the first of the month in which a tax is due.
- You'll get another reminder on the fifth of the month, if you haven't recorded the payment yet or filed your return.