

Sales Tax in QuickBooks

Sync sales tax from FR Pilot to QuickBooks



Open QuickBooks

1. Create a **New Item** of type **Other Charge**
2. Under **Account**, select your sales tax account
 - o If you do not already have a sales tax account, create a new account of type **Other Current Liability**

The screenshot shows the 'New Item' dialog box with the following details:

- TYPE:** Other Charge (Use for miscellaneous labor, material, or part charges, such as delivery charges, setup fees, and service charges.)
- Item Name/Number:** Sales Tax
- Description:** Sales tax
- Amount or %:** 0.00
- Account:** Sales Tax

Log in to FR Pilot Sync Agent

1. Click the **Settings** tab on the left side of the window
2. Click **Load and Edit Settings**
3. Under **Invoice Sales Tax Item** select your sales tax **Item**
4. Click **Save**
5. Click the **Sync Invoices** tab on the left side of the window
6. **Load** and **Sync** invoices
7. Sales tax will now be shown as a line item on invoices

The screenshot shows an invoice with the following details:

- DATE:** 04/05/2018
- INVOICE #:** 118040049
- SHIP TO:** [Empty]
- SHIP DATE:** 04/05/2018

QUANTITY	ITEM CODE	DESCRIPTION	PRICE EACH	AMOUNT	TAX
10	BB Pastries:BB...	Double Chocolate BB	9.00	90.00	Tax
10	BB Pastries:BB...	Apple Butter Braid	9.00	90.00	Tax
10	BB Pastries:BB...	Blueberry Cream Cheese Butter Braid	9.00	90.00	Tax
10	BB Pastries:BB...	Cherry Butter Braid	9.00	90.00	Tax
1	Sales Tax	Total sales tax	26.78	26.78	Non

TOTAL: 386.78
PAYMENTS APPLIED: 0.00
BALANCE DUE: 386.78