

# Tax Code Update

Tax rates periodically change; therefore, you will need to make changes to PestPac to account for those updates. This document reviews the two options available to you, including:

- [OPTION 1: Automatic Update](#)
- [OPTION 2: Create a New Tax Code](#)

**\*IMPORTANT\*** The price of an invoice cannot be changed, so any changes to the tax rate will must be implemented prior to posting the desired service orders.

If invoices have been generated and an update has not been performed, the invoices will need to be voided and re-created after the tax code rate has been updated.

## Option 1: Automatic Update

PestPac has an automatic update feature for Service Orders and Setups if the tax rate is changed in the Tax Code lookup table.

Location: **1015** Bill-To: **1015** ©2018 WorkWave LLC  
Dora's Bakery Dora Walsh  
246 Boston Ave POBOX 0983  
Point Pleasant Beach, NJ 08742 Point Pleasant Beach, NJ 08742  
732-894-5670 732-894-5670  
jenw@marathondata.com

Past Due	Current	30 Days	60 Days
S2 - On Alert	10.00	0.00	0.00

Photo :: Calendar :: Map :: [Zillow.com](#) :: Directions :: Closest Techs :: Add Lead :: Add C

Tasks (0) Past Due: 0

Threshold Alerts (2) [Feed](#)

Service	Schedule	Bill To
SENTRICON	QFEB1WED	1015
PC-MONTHLY	M1FRI	1015
100	2TIMES	1015
(None)		1015
BEES		1015
I SENT MONITOR		1015
I (None)	M1SUN	1015

New Service Setup New Setup Group New Renewal New Program

Branch: Main Type: R  
Tax Code: **EXEMPT** Source: NJ/NY123  
Map Code: County: MONMOUTH COUNTY

On the Order, you will see the current tax.



Service	Description	Qty	Price	Prod. Value	Cost	Tax	Del	GL Code
PC-MONTHLY	Monthly Pest Control	1.00	65.00	65.00	0.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	PC
						<input type="checkbox"/>	<input type="checkbox"/>	
						<input type="checkbox"/>	<input type="checkbox"/>	

Attributes: (None) [Select Areas](#) [Associate Orders](#)  
 This order is linked to the service setup [PC-MONTHLY](#).

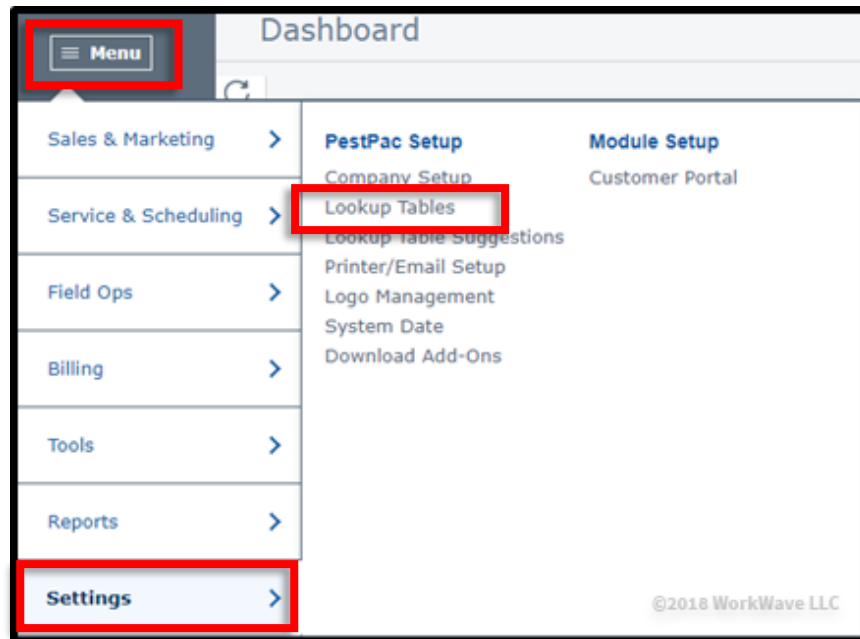
Tax: 0.00  
 Total: 65.00

Added by ADMIN on 09/22/15 11:41 AM  
 Updated by ADMIN on 09/22/15 11:41 AM  
 Original Work Date 10/04/15

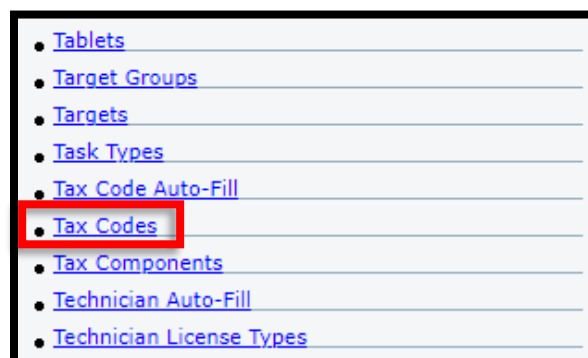
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To update your tax code, complete the following steps:

1. Go to *Menu > Settings > Lookup Tables*.



2. Select the *Tax Codes* lookup table.



3. Select the tax code that needs to be updated, and change the tax rate.

### Maintain Tax Codes

Tax Code:   Canadian Tax

Description:

**Tax Rate:**

Tax Component	Tax Rate
CITY	<input type="text" value="0.000000"/>
COUNTY	<input type="text" value="0.000000"/>
HST	<input type="text" value="0.000000"/>
<b>STATE</b>	<b><input type="text" value="0.071875"/></b>

- Click *OK* on the popup screen reminding you that updating the tax rate will change all Service Orders and Setups with that code.

app.pestpac.com says:

Updating the tax rate will change all Service Orders and setups with this tax code. Continue?

Prevent this page from creating additional dialogs.

- After selecting *OK*, the tax will be recalculated on all existing Service Setups / Orders:

Service	Description	Qty	Price	Prod. Value	Cost	Tax	Del	GL Code
LCA 1	fertilization with crabgrass	1.00	53.00	0.00	0.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	LAWN
						<b>Tax: 3.63</b>		
						<b>Total: 56.63</b>		

Attributes: (None) [Select Areas](#) [Associate Orders](#)  
This order is linked to the program **GOLD LAWN**.  
Added by ADMN on 02/22/16 12:31 PM  
Updated by N/A on 02/22/16 12:31 PM  
Original Work Date N/A

## Option 2: Create a New Tax Code

You can also create a new tax code in the Tax Code lookup table. Doing so requires a data update to be performed for Service Orders and Locations to change them to the new tax code that was added.

Note: Updating the Location will automatically update the Setup as well.

This option could be used if a subset of customers needs to be updated instead of all customers across the database.

1. Perform an Advanced Search of all customers by clicking the *Advanced Search* link under the *Quick Search* and leaving all fields of the Location tab within Search as blank, and click the *magnifying glass*.

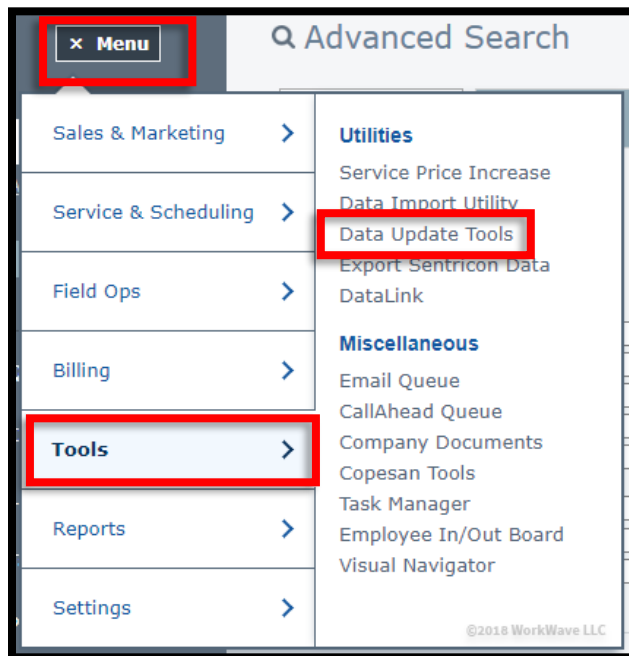
In this example, we are going to create a list so that we can update a specific branch.

The screenshot shows the 'Advanced Search' window with the 'Location' tab active. It contains various search criteria fields such as Account #, Copesan #, Order #, Copesan Ticket #, Company, Last Name, Street, City, State, Phone, E-Mail, Country, Case #, Bill-To #, Corporation #, Invoice #, Company Search, First Name, Street Search, Zip Code, Branch (set to North Brunswick), Region, and Sub-Region.

1. Name the list, and choose the type of list (Dynamic or Static), and click *OK*.

The 'New List' dialog box is shown. It has a 'List Name' input field, radio buttons for 'Dynamic' (selected) and 'Static', and a section for 'Date Ranges' with dropdown menus for 'Contact', 'Entered', and 'Last Stage Change', all set to 'All'. 'Ok' and 'Cancel' buttons are at the bottom.

2. Go to *Menu > Tools > Data Update Tools*.



3. Select *Data Update Utility*.

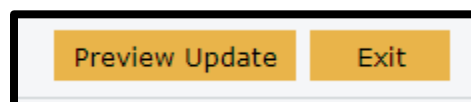


4. For Selection Criteria, choose the relevant Location List and Data Table. For Update Data, select the relevant options.

Note: You will need to run the utility twice: once for the *Locations* Data Table and again for the *Service Orders* data table.

In this example, we have selected the *Locations* Data Table. Select the *Tax Code* Data Field, and Match Old Value on *Specified*. Enter the old and new values.

5. Click the *Preview Update* button, and click the blue link to review the data.



6. The file will download to your computer where you can open it to view or save it for reference. After you have reviewed the file, click the *Update Data* button.

7. Click *OK* in the popup.

8. When finished, the screen will refresh and show that the update has been completed.

REMEMBER: For additional setup, training, and usage resources for FREE, including live webinars and a robust video library, please visit [PestPac University](#).