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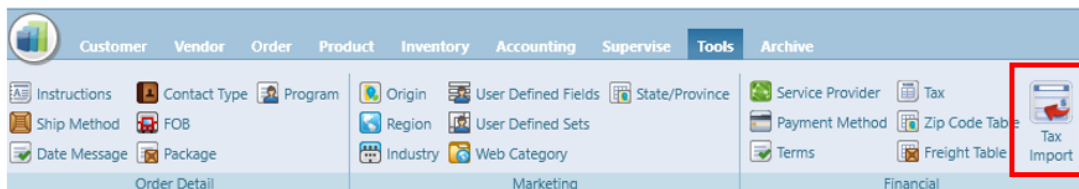
How Do You Import Zip2Tax™ Zip Code Table Updates?

Angie K - 2023-07-11 - in Tools & Controls

How Do You Import Zip2Tax™ Zip Code Table Updates?

The menu option and role manager option “Tax Import” allows updating the zip code table tax codes based on spreadsheet from Zip2Tax™. To purchase a Zip2Tax subscription, you may contact our support department, who will contact out Zip2Tax representative to make the referral.

This option is located under Tools - Financial - Tax Import

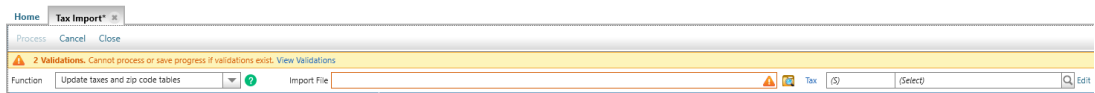


The menu option also contains functions that allow the updating of customers and contacts tax codes, based on their zip code, with the tax codes of the related zip code table record tax codes. The customer/contact functions can be utilized by anyone with zip code table records.

Tax import updates the various reporting codes within the tax resources. Since these codes are now stored within the new fields, they will no longer be contained within the tax resource description which is updated during the import. This makes the description easier to understand as it will only contain state, county, and city.

Code	<input type="text" value="29104"/>	Description	<input type="text" value="NC,Orange,Cedar Grove"/>
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Update taxes and zip code tables



Update taxes and zip code table allows batch updating of U.S. tax code tax rates and zip code table records by importing a Zip2Tax™ csv file.

The tax code you enter in the Tax field following the import file path will be used as the tax code in zip code table records, which are created to fill in zip code gaps that are not included in the file. After the import, zip code table records will exist for all zip codes between 00001 and 99999.

Each zip code in the file will have an individual zip code table record created. Each gap will have a record created for the zip code range in each gap.

Tax Codes - Based on the number in the csv z2t_ID column, tax codes will either be added or updated with a new tax rate record. IF a tax code is added, the code will be based on the z2t_ID and the description will be built using the state, county, city, and special district information from the file. As the description limit is 50 characters, some information may be truncated. If any csv records reporting code is empty or 0, that part of the description will be updated with 'NA'.

Before performing the upload, edit the file you downloaded from your Zip2Tax portal.

- Remove any rows for states you are not collecting sales tax.
- Add the following columns to the file:
 - Column R - GLAccount - This is the sales tax liability for this tax record.
 - Column S - VendorCode - This is the vendor code to be used to post the payable when invoicing customers.
 - Column T - EffectiveDate - The date (M/D/YYYY) the tax rate goes into effect. Usually, the first day of the month you downloaded (Ex: 10/1/2023).

R	S	T
GLAccount	VendorCode	EffectiveDate

Zip Code Table - Based on the csv zip code column, zip code table records will be created for each zip code in the file. During the process, all existing U.S. zip code table records are deleted and then added based on the records in the import file. Only records in the csv marked as Primary=1 will be imported.

NOTE: Before running this option, close any open Zip Code Table Tabs as

they will be inaccurate after processing. You can then reload the option after processing if you wish.

After clicking Search, any invalid general ledger accounts, states, or vendors will appear in the list. These must be added (or the csv edited) before processing can occur.

After processing, a status report will display a list of all tax codes added or updated.

NOTE: Additional fields have been added to the tax resource to store the various reporting codes contained in the Zip2Tax™ import file.

These include the import file fields for:

- ReportingCodeState
- ReportingCodeCounty
- ReportingCodeCity
- ReportingCodeSpecialDistrict

The screenshot shows a tax resource form with the following fields and values:

- Code: 29104
- Description: NC,Orange,Cedar Grove
- General Ledger: 228
- Sales Tax Payable: [Search] Edit
- Vendor: 3616
- NC Tax: [Search] Edit
- Freight or Shipping and Handling is taxable
- Country: UNITED STATES [Search]
- State/Province: NC [Search]
- County: Orange
- City: Cedar Grove
- Locality: HD School District
- Reporting Codes (highlighted in red):
 - State Reporting Code: 55
 - County Reporting Code: 68
 - City Reporting Code: 25
 - Special District Reporting Code: 68
- Rate: 7.5000%
- Effective Date: 1/1/2022
- Until: [Calendar]
- + Add rate

Update Customer Taxes

The screenshot shows a dialog box titled "Tax Import*" with the following elements:

- Buttons: Home, Process, Cancel, Close
- Function: Update customer taxes [Dropdown] [Help Icon]

Update customer taxes allows a batch updating of customer resource tax codes based on your zip code table records. All customers whose zip/postal code meets the following criteria will be updated.

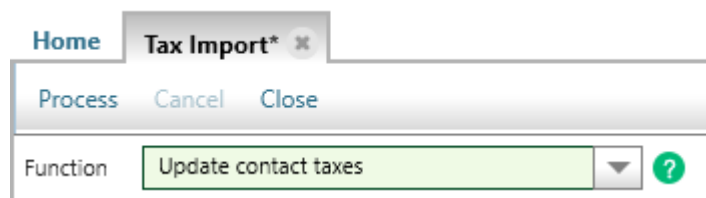
- Country must be United States.
- Zip code must contain exactly 5 digits with no characters or have the zip+4 format.
- There cannot be any tax-exempt certificates for the default address.

During the process, current tax codes for a customer will be deleted and updated based on a matching zip code table record, if one exists. If none exist, the customers tax codes will not be changed.

Note: Rename Columns Headers on Row 1 to the following:

- Column L should be renamed to State
- Column M should be renamed to State Code
- Column N should be renamed to County
- Column O should be renamed to County Code
- Column P should be renamed to City
- Column Q should be renamed to City Code
- Column R should be renamed to Locality Code

Update contact taxes



Update contact taxes allows batch updating of a customer's contact tax codes based on your zip code table records. All contacts whose zip/postal code meeting the following criteria will be updated.

- Country must be United States.
- Zip code must contain exactly 5 digits with no characters or have the zip+4 format.
- There cannot be any tax-exempt certificates for the default address.

During the process, current tax codes for a contact will be deleted and updated based on a matching zip code table record, if one exists. If none exist, the contacts tax codes will not change.