

Adding Tax Rates

You can enter all the tax rates you need to charge for your services.

You can specify a default tax rate for a service plan. When you add a service to a client's account it includes the default taxes established in the service plan, and provides the option to enable or disable any of them for each individual service. When that service is invoiced, Ubersmith automatically adds a line item for each applicable tax rate.

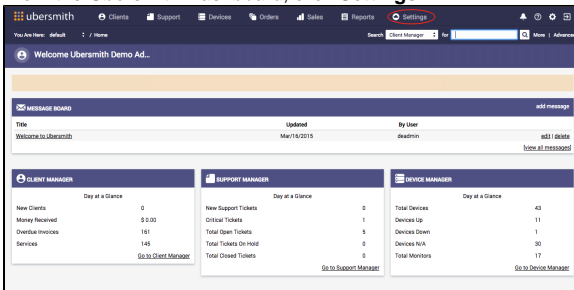


Note

[SureTax tax engine](#) is available to automatically create all your tax rates. Tax rates billed through third-party integrations are automatically added.

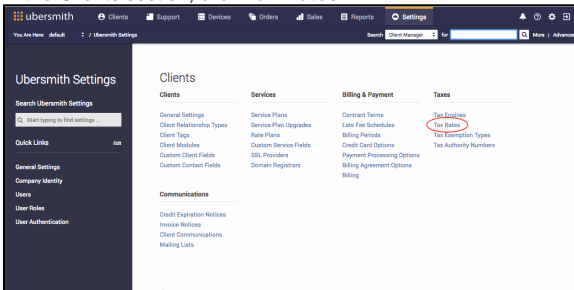
Access the Tax Rates Page

1. From the *Ubersmith Dashboard*, click **Settings**.



The *Ubersmith Settings* page appears.

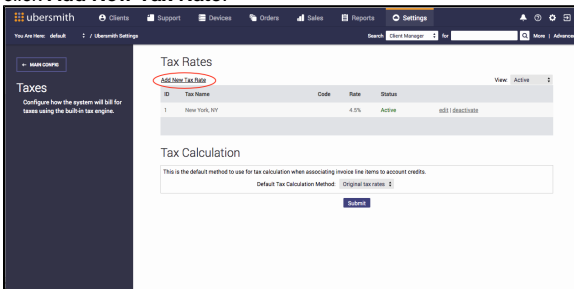
2. In the *Clients* section, click **Tax Rates**.



The *Tax Rates and Tax Calculation* page appears.

Complete the Add Tax rate Page

1. [Access the Tax Rates page](#).
2. click **Add New Tax Rate**.



The *Add Tax Rate* page appears.

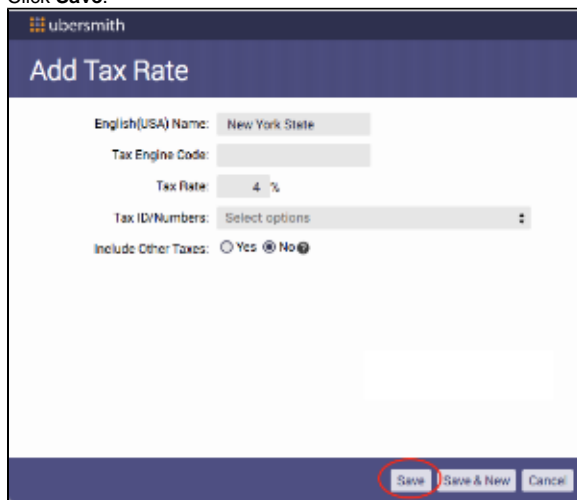
3. In the **Name** field, enter the name of your tax rate.
4. In the **Tax Engine Code** field, enter the code from your third-party tax engine.
5. In the **Tax Rate** field, enter the appropriate tax rate.
6. In the **Tax ID/Numbers** field, [select the appropriate tax authority number](#).
7. In the **Include Other Taxes** select either Yes to include all other tax rates being billed in the invoice total or No.

On this page:

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8. Click **Save**.



The screenshot shows the 'Add Tax Rate' form in the 'ubersmith' application. The form has a dark blue header with the 'ubersmith' logo and the title 'Add Tax Rate'. Below the header, there are several input fields: 'English(USA) Name' with the value 'New York State', 'Tax Engine Code' (empty), 'Tax Rate' with the value '4 %', and 'Tax ID/Numbers' with a dropdown menu showing 'Select options'. At the bottom of the form, there is a radio button group for 'Include Other Taxes' with 'Yes' and 'No' options, where 'No' is selected. At the very bottom of the form, there are three buttons: 'Save', 'Save & New', and 'Cancel'. The 'Save' button is circled in red.

Related Topics

[Adding Tax Engines](#)

[Adding Tax Exemption Types](#)

[Adding Tax Authority Numbers](#)

[Managing Tax Engines](#)

[Managing Tax Rates](#)

[Managing Tax Exemption Types](#)

[Managing Tax Authority Numbers](#)

[Setting the Default Tax Calculation Method](#)