Linking Tax Profiles to Postal Codes

Last Modified on 11/01/2024 2:17 pm EDT

This guide explains how to link tax profiles to specific postal codes. It is intended for system administrators.

- 1. Navigate from Main Menu > System Admin > Postal Codes.
- 2. Use the <u>Quick Search bar (http://aace6.knowledgeowl.com/help/using-the-quick-search-bar)</u> to find the desired postal codes or click **Show All**.
- 3. Click Edit > Update Tax Profile for List.

• • • Postal Codes													۵		
											Edit	ns 🖈			
										Update Postal Format for List					
	Postal Codes											Update Tax Profile for List			
e													Update Sales Rep for List	a	-
-	Postal Code		City	County	State	Country	Country Cod	e	Postal Format	Tax	Profile Sales Re	p .	Update Account Manager for List		
	99501	*	Anchorage		AK	USA	US	>	American	> 00S			Update County for List	F	-
	99502	*	Anchorage		AK	USA	US	>	American	> 005			Update State for List	Ŧ	-
	99503	*	Anchorage		AK	USA	US	>	American	> 005			Update Country for List	Ŧ	-
	99504	*	Anchorage		AK	USA	US	>	American	> 005			Update Country Code for List	Ŧ	-
	99505	*	Fort Richardson		AK	USA	US	>	American	> 005				FR	-
	99506	*	Elmendorf Afb		AK	USA	US	>	American	> 005			Update City to Proper Case for List	R	- 15

- 4. At the confirmation dialog box, click **Select**.
- 5. Click the tax profile you want to associate with the selected postal codes.

Note: aACE will automatically update and return to the list view.

Tax Profile	Abbr	Start Date	End Date	Default	Use	EU	Status	
Profiles				Selected	Profiles			
Name		Abbr		Name				
California		CA	^	AvaTax				
New York		NY2022						
New York City		NYC						
New York State		NYS						
Out of State		OUT						
Use Tax		USE						
			~					