

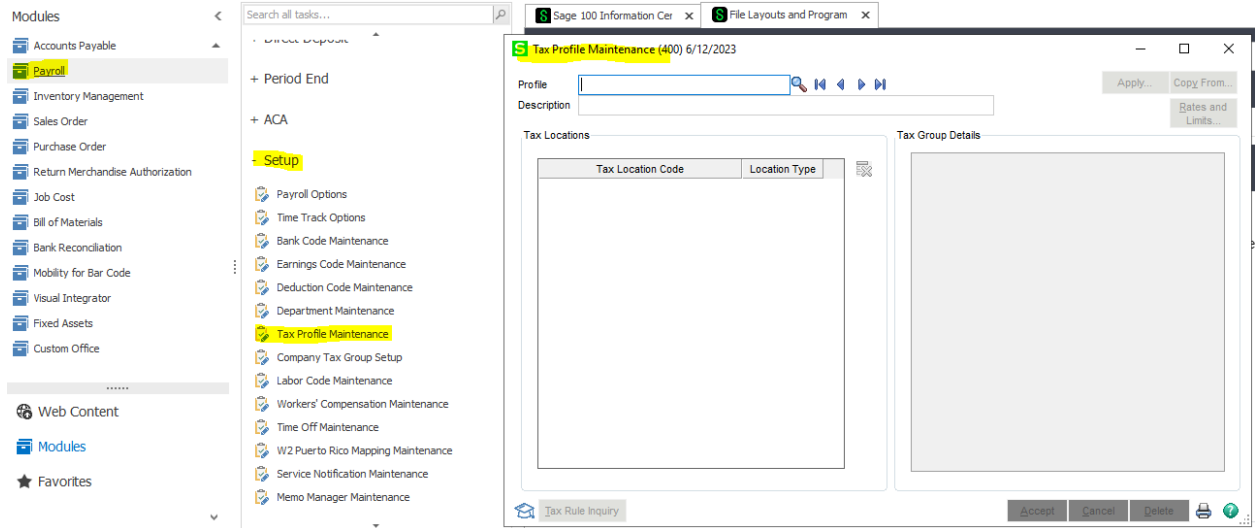


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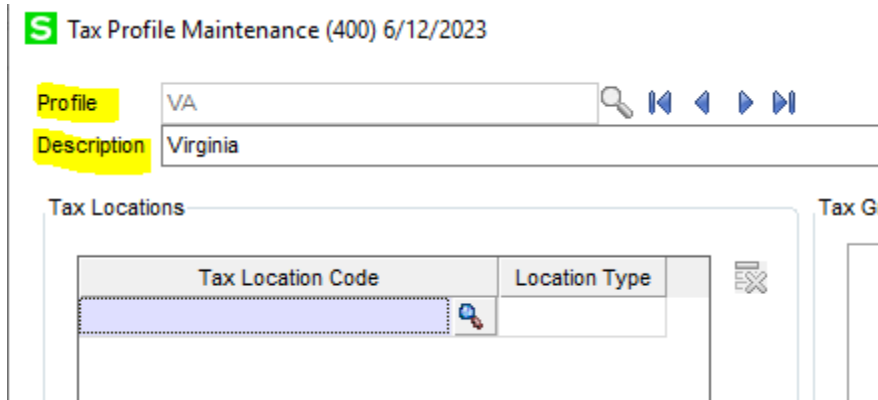
How To Setup Tax Profile and Company Tax Group in Sage 100 Payroll

****Please make sure all payroll entries are posted prior to creating a new tax profile or company tax group****

1. In Sage 100 Go To Payroll – Setup – Tax Profile Maintenance



2. Once the Tax Profile Maintenance is open, type in the name of the profile you are creating i.e. VA then you will type in the Description i.e. Virginia:



3. Tab through to the Tax Location and use the lookup to choose which location code applies, choose just a state or the state and city of where the employee either lives and works or just lives:



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S Tax Profile Maintenance (400) 6/12/2023

Profile 🔍 ⏪ ⏩

Description

Tax Locations

Tax Location Code	Location Type
VA-INDCT-SUFFOLK	<ul style="list-style-type: none">WorkResidenceBothNone

4. Then on the right-hand side, make sure the correct details are selected that apply:

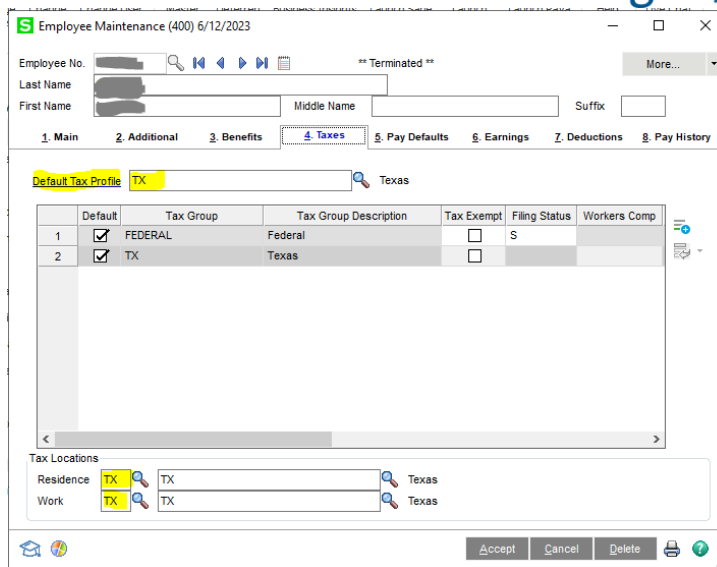
Tax Group Details

- VA
 - FEDERAL
 - Tip Income Federal Social Security Tax Employer Liability
 - FMED Excess GTL Coverage Tax Withholding
 - FMED Excess GTL Coverage Tax Employer Liability
 - FSOC Excess GTL Coverage Tax Withholding
 - FSOC Excess GTL Coverage Tax Employer Liability
 - Federal Regular Income Tax Withholding
 - Federal Supplemental Income Tax Withholding
 - Federal Regular Medicare Tax Employer Liability
 - Federal Regular Medicare Tax Withholding
 - Federal Regular Social Security Tax Employer Liability
 - Federal Regular Social Security Tax Withholding
 - Tip Income Federal Social Security Tax Withholding
 - Federal Unemployment Tax Employer Liability
 - Tip Income Federal Medicare Tax Withholding
 - Tip Income Federal Medicare Tax Employer Liability
 - *EXPIRED* Federal Social Security Tax EPSLS Withholding
 - *EXPIRED* Federal Social Security Tax EPSLS Employer Liability
 - *EXPIRED* Federal Social Security Tax EPFML Withholding
 - *EXPIRED* Federal Social Security Tax EPFML Employer Liability
 - *EXPIRED* Federal Medicare Tax EPSLS Withholding
 - *EXPIRED* Federal Medicare Tax EPSLS Employer Liability
 - *EXPIRED* Federal Medicare Tax EPFML Withholding
 - *EXPIRED* Federal Medicare Tax EPFML Employer Liability
 - *EXPIRED* Federal Social Security Tax EPSLO Withholding
 - *EXPIRED* Federal Social Security Tax EPSLO Employer Liability
 - *EXPIRED* Federal Medicare Tax EPSLO Withholding
 - *EXPIRED* Federal Medicare Tax EPSLO Employer Liability
 - VA
 - Virginia Regular IT Withholding
 - Virginia Unemployment Insurance Tax Employer Liability
 - Virginia Regular IT Withholding (NR)

5. Click Accept this would then be assigned under the Employee Maintenance Tab 4. Taxes Tab contains the Default Tax Profile Field:



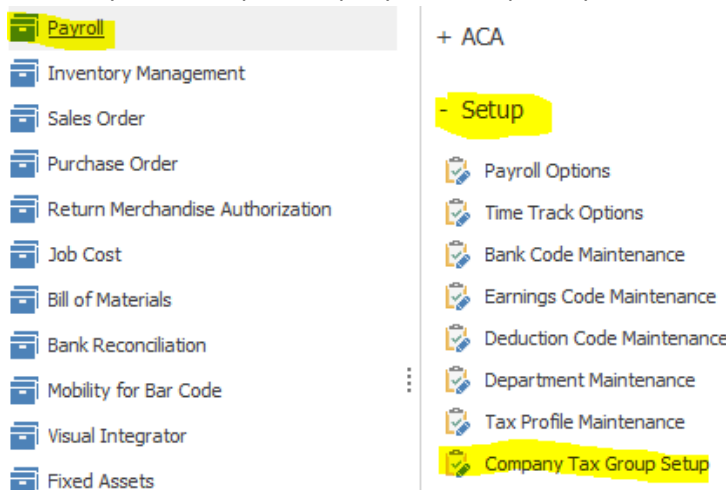
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Once the Tax Profile has been created, you then need to create a Company Tax Group that coincides with that Profile (the company tax group tells which GL accounts to apply withheld amounts to)

Confirm you have the correct GL Accounts created for Tax Withholding, Employee Unemployment, Employer Unemployment, and Employer's Workers' Comp prior to creating the company tax group:

1. Go to Payroll – Setup – Company Tax Group Setup



2. Company Tax Group needs to match exactly what your Tax Profile is set to. When you type the Tax Group your description should auto fill:



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Company Tax Group Setup (400) 6/12/2023

Tax Group: VA
Description: Virginia

1. Main | 2. Additional | 3. Tax Rates

Tax ID No. [] Round Withholding Tax Amount
Unemployment Tax ID No. []

G/L Accounts

Tax	G/L Account No.	G/L Account Description
Withholding		
Employee Unemployment		
Employer Unemployment		
Employer Workers' Comp		

Accept Cancel Delete

3. Then fill out the following:

- Tax ID No.
- Check if you want to Round Tax Amounts
- Unemployment Tax ID No.

Tax ID No. [] Round Withholding Tax Amount
Unemployment Tax ID No. []

G/L Accounts

d. Enter which GL Accounts for the different taxes withheld:

G/L Accounts

Tax	G/L Account No.	G/L Account Description
Withholding		
Employee Unemployment		
Employer Unemployment		
Employer Workers' Comp		

e. If Tax Rates are different, click on Tab 3 Tax Rates and enter the Rate Amount:

Company Tax Group Setup (400) 6/12/2023

Tax Group: VA
Description: Virginia

1. Main | 2. Additional | 3. Tax Rates

	Tax	Effective Date	Rate
1			0.00000 %

Accept Cancel Delete

f. Then Click Accept.