

Unit Financial Systems

User Guide

Adding and Updating Tax Rate

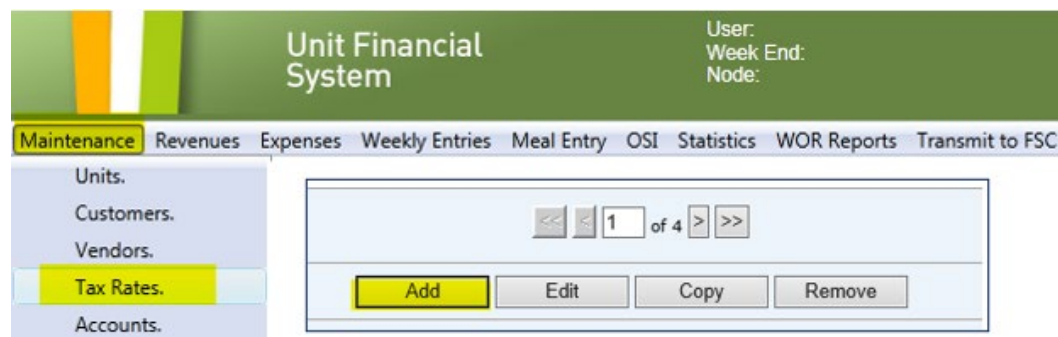
Please note: this instruction is for US units only and can be used for new and/or existing Nodes. If you are setting up a new node ID in Web UFS, you will need to follow the instructions in this guide.

What is a node ID? Web UFS requires units to be set up and organized with a node ID. A node ID (think databases) is linked to a primary unit number and can contain many units and/or subunits. Units in each node ID will share data related to vendors, customers, cashiers, where applicable. Web UFS users must request access to each node via access forms on [SoUnified](#). Note: if you need to request a new node ID, please complete the Web UFS New Node ID request, under the Finance section of the Information Security Access Request Form.

Adding a Tax Rate

Tax rate information is used to calculate the sales tax on the Register Worksheet Reports and on the appropriate lines for each billing invoice. If your Tax Rate changes, you will need to update this and apply changes to Register Model Worksheets and Billing Templates.

Navigate to Maintenance > Tax Rates



Click the **“Add”** button on the bottom of the page and the following screen will appear:

Maintenance->Tax Rates.

Tax Code:

Tax Description:

Tax Rate %:

Tax Acct No.:

- **Enter the following information in the text fields:**
 - Tax Code (a number between 1 and 999)
 - Tax Description
 - Tax Rate (enter the actual tax rate. For example, enter 8.25 not .825)
 - Enter Tax Account Number or click account lookup.
 - In the account lookup screen, select the tax distribution account number and click OK. Account Description automatically populates.
- **Click Save.**

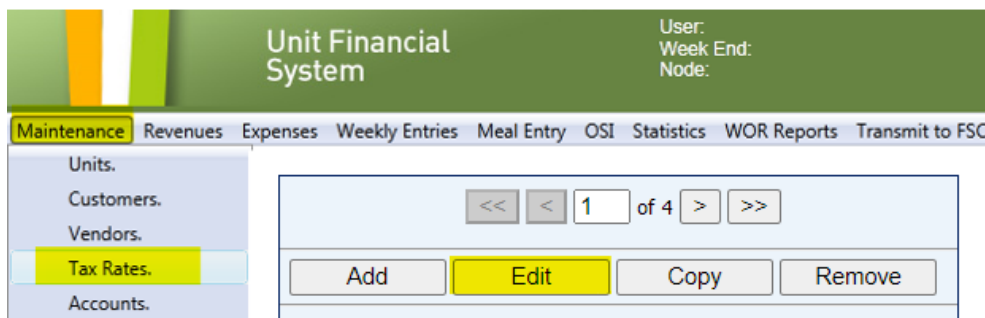
Note: Work with Operations Accounting or your Finance Director if you need assistance in determining the tax GL account number

Editing a Tax Rate

Remember, if your Tax Rate changes, you will need to update this and **apply changes to Register Setup and Billing Templates**. Visit the [UFS Training](#) Sodexo_Net page for user guides to help you edit the cash and billing templates.

Navigate to Maintenance > Tax Rates

- Select the tax rate and click **Edit**.
- Enter the required changes to the information.
- Tax Description
- Tax Rate (enter the actual tax rate. For example, enter 8.25 not .825)
- Click Save.



For UFS technical support:

- Submit a help ticket by clicking Generic Incident on [Self Service Mobile](#)
- You may also email for support at Helpdeskufssupport.Noram@sodexo.com, or
- If **urgent**, please call the UFS Service Desk at 1-888-667-9111, options. 1, 2, 1.

For General UFS Questions

- Please use [SoFinance](#) to request support from the UFS Team.