HOW TO CREATE A TAX CATEGORY

Question

PLEASE REFER TO THE STEPS BELOW:

Answer

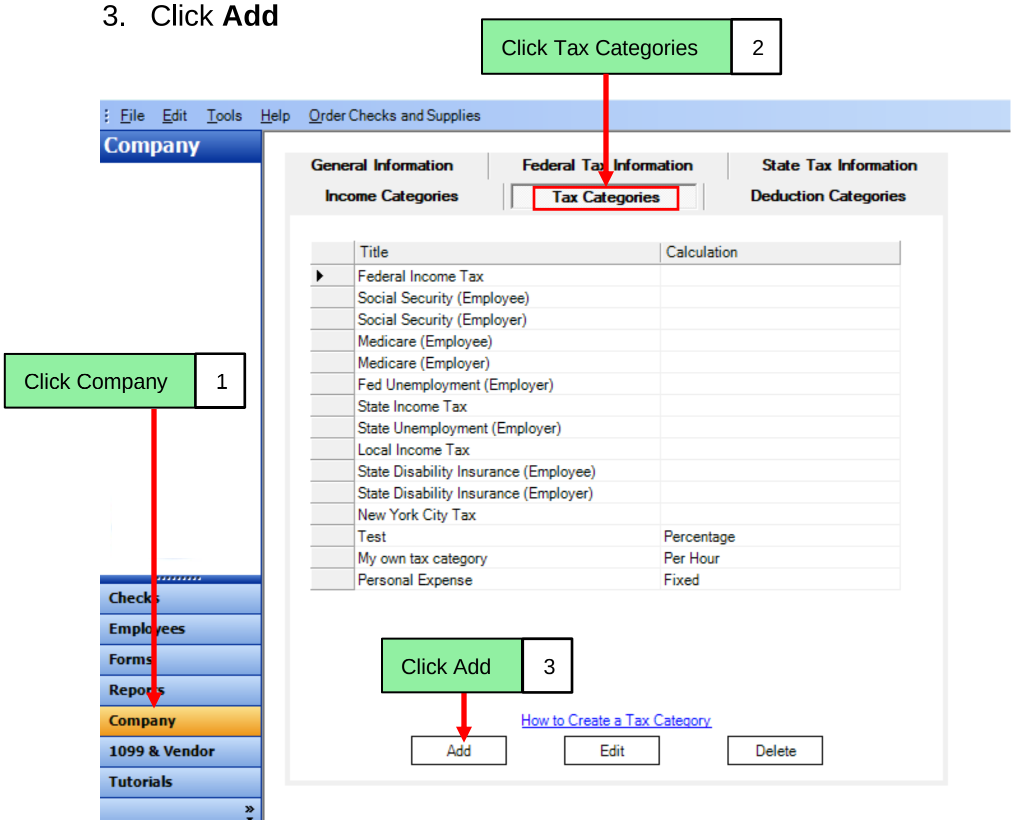
Payroll Mate gives users the ability to create a custom tax category if the tax category does not already exist in the software.

To create a tax category:

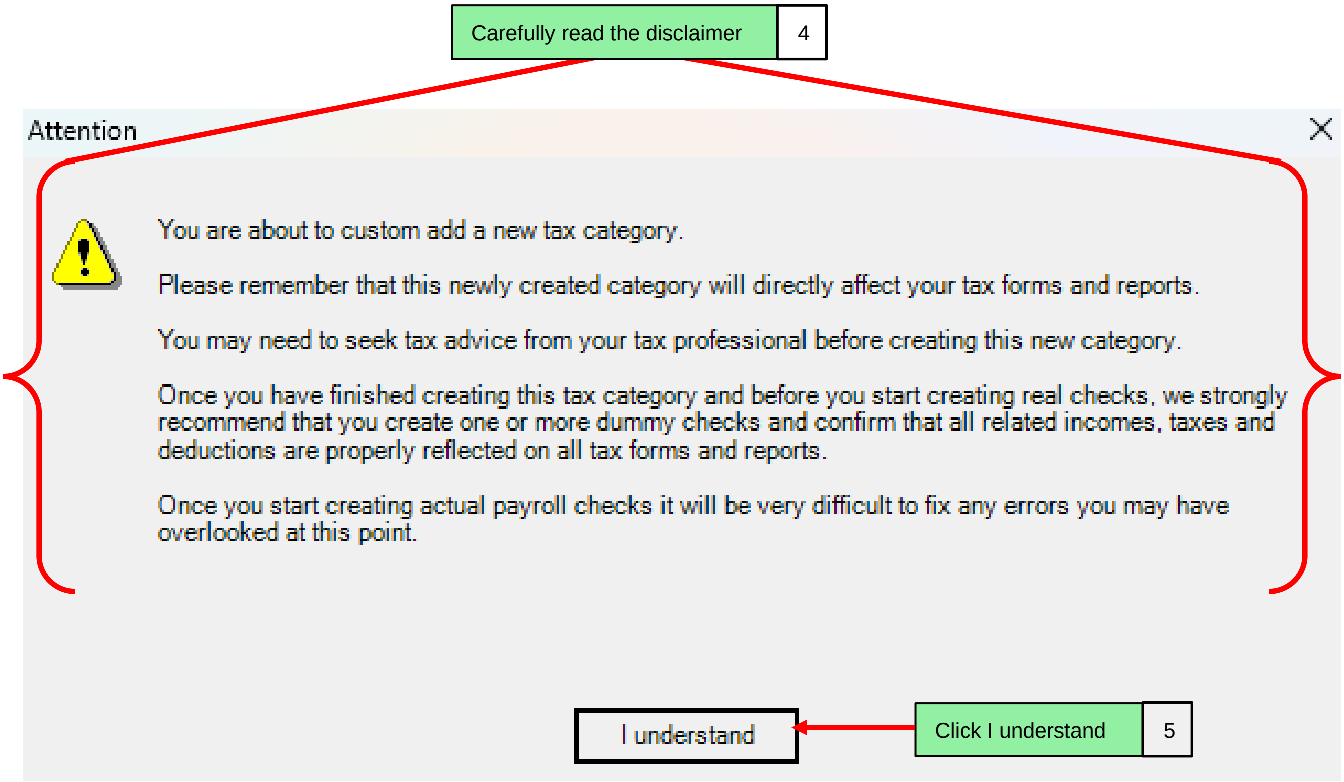
Make sure you have the correct company open.

The following is a step-by-step guide to adding a tax category:

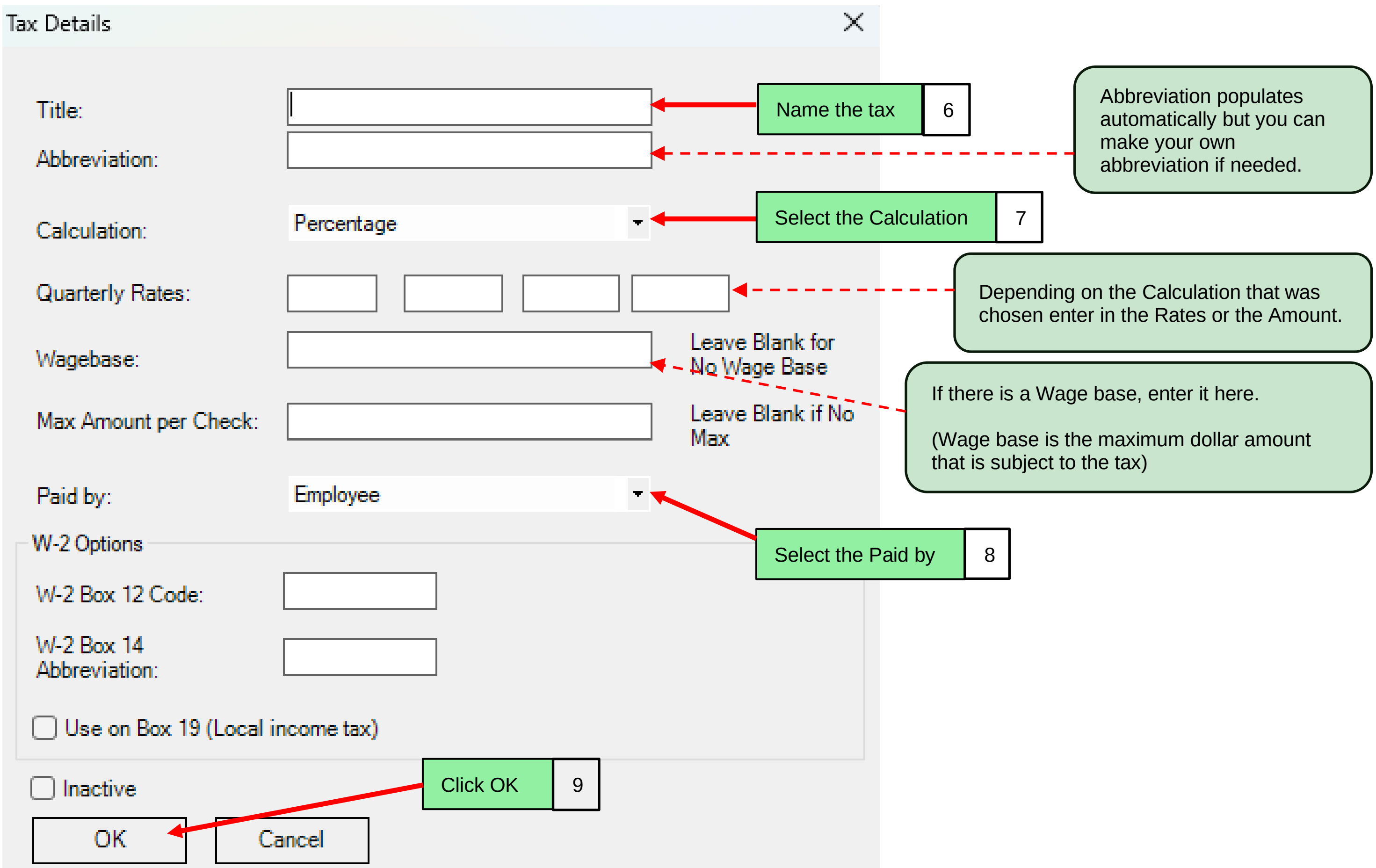
1. Click **Company**
2. Click **Tax Categories**
3. Click **Add**



4. **Carefully read the disclaimer** to make sure you understand it.
5. Once you have carefully read and understand the disclaimer, click **I understand**



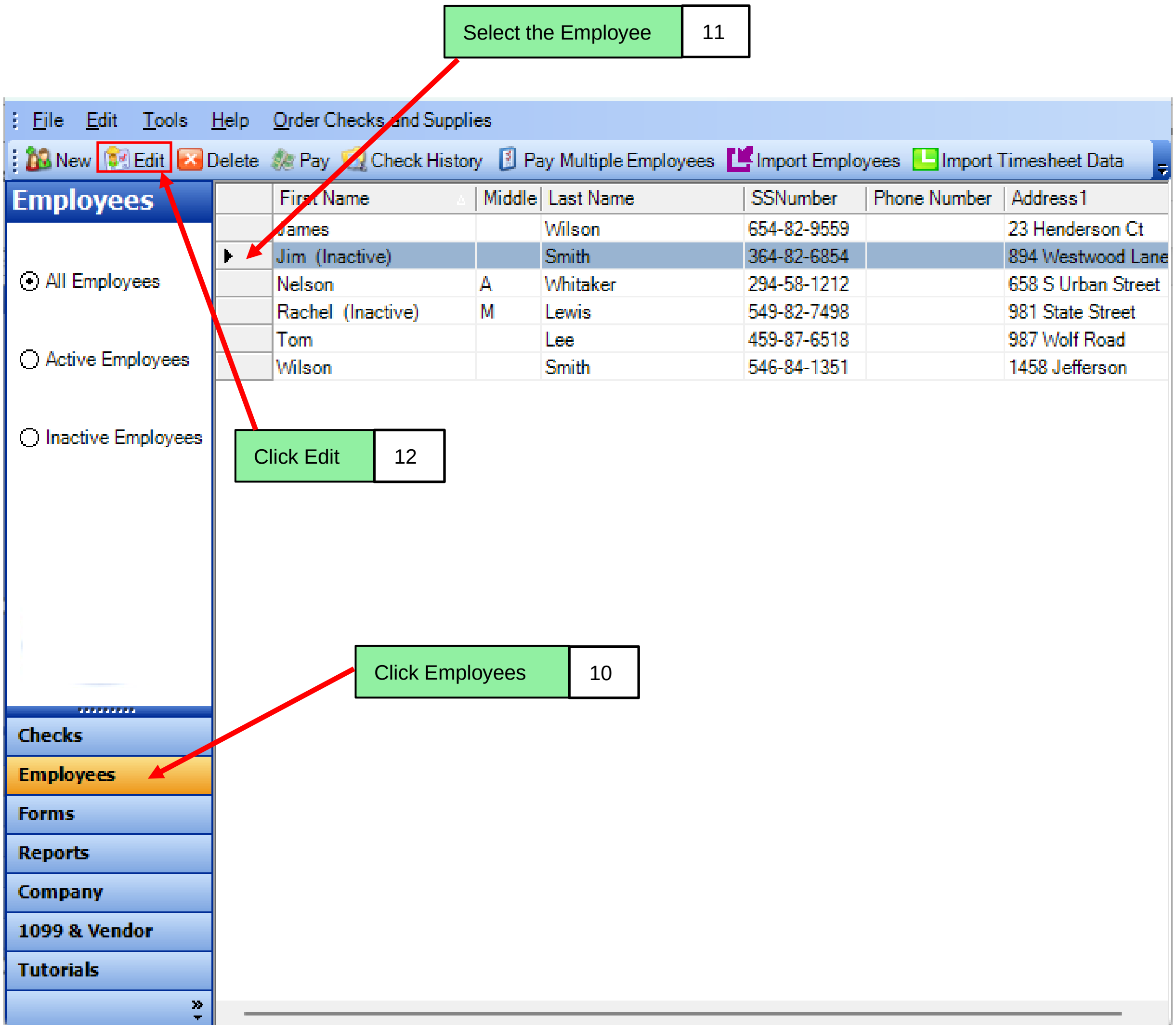
6. **Name the tax** that is being created
7. **Select the Calculation** you need from the dropdown
8. **Select the Paid by** you need form the dropdown (choose Employee or Employer)
9. Click **OK**



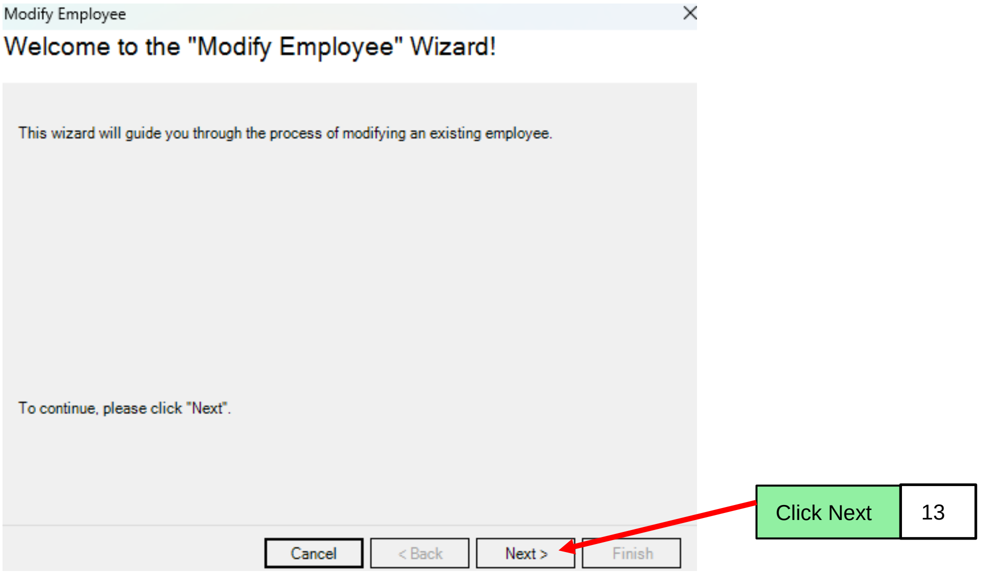
You have now created your custom tax category.

After creating the custom tax category, you may now apply it to your employee(s).

10. Click **Employees**
11. **Select the Employee** you need to add the newly created custom tax category to.
12. Click **Edit**

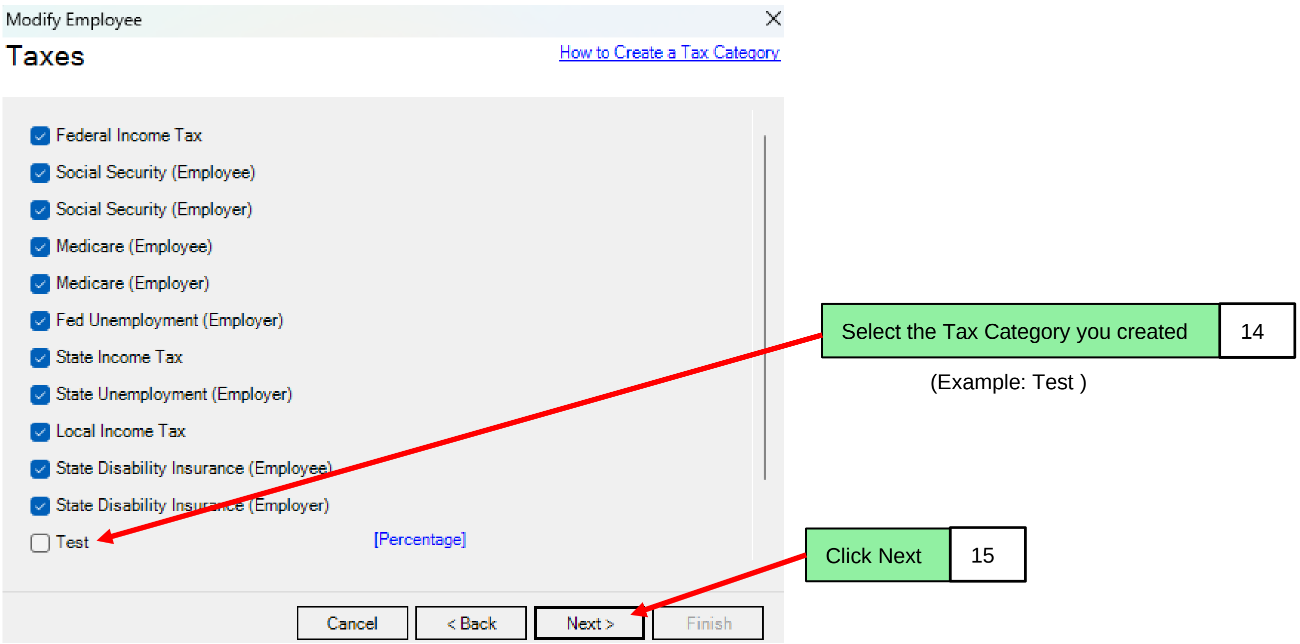


13. The Welcome to the Modify Employee Wizard will appear, click **Next**



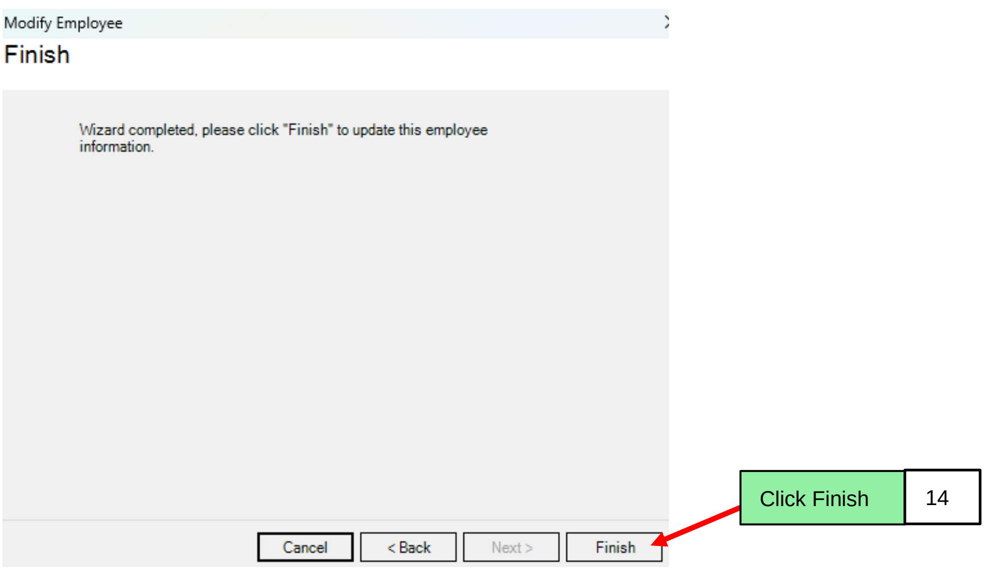
Continue to click next until you reach the **Taxes** screen

14. **Select the Tax Category** you just created (Example: Test)
15. Click **Next**



<u>Continue to click next</u> until you reach the **Finish** screen

16. Click **Finish**



You have now applied your newly created custom tax category to that one employee.

You may proceed with applying it other employees, if needed.