Taxes

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Purpose and when to use this record

Configure a tax rate, its liability account, and the tax-authority vendor used to track and remit collected tax.

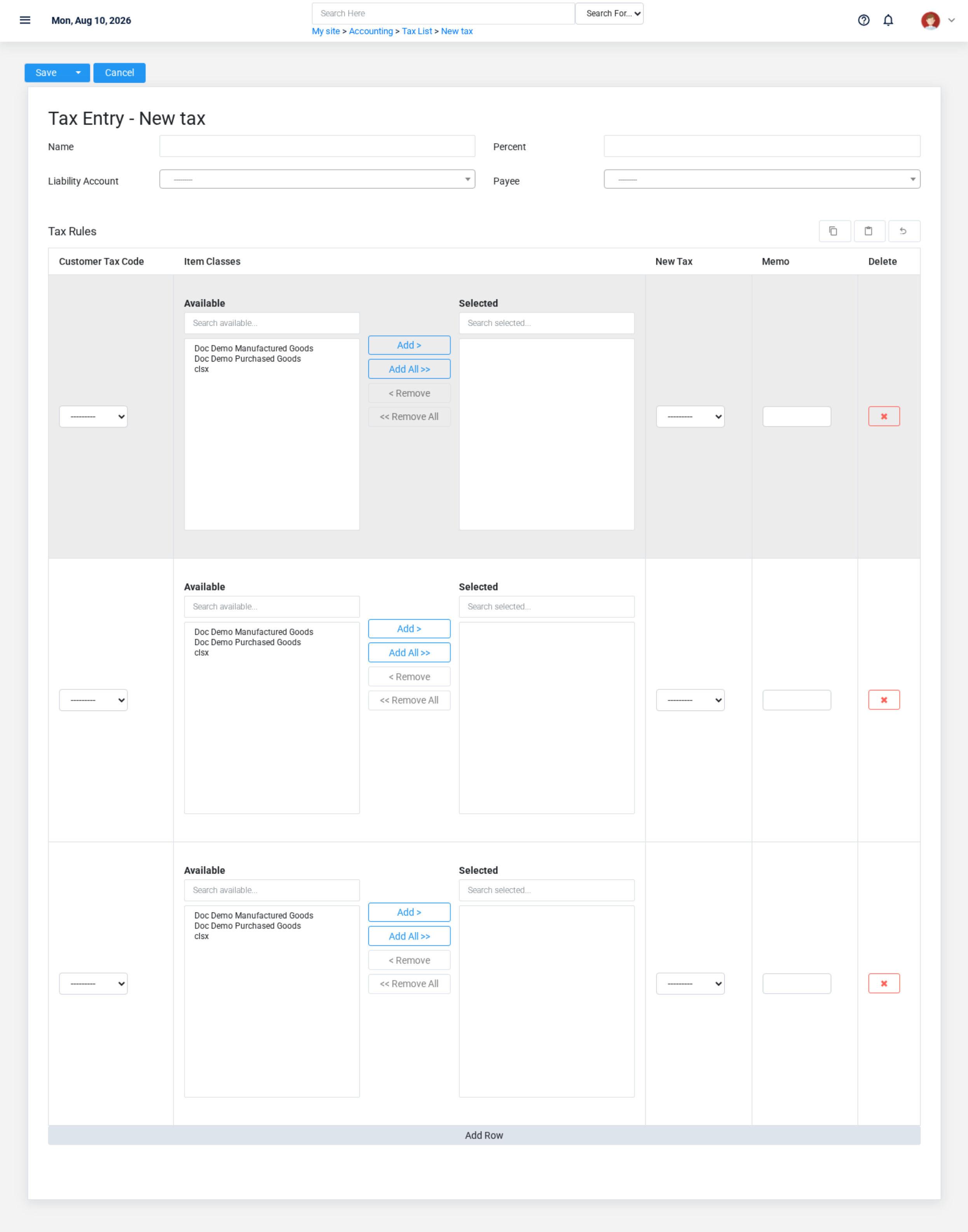
At a glance

- **Identify it by: Name**.
- **Check its business context: Liability Account**, and **Payee**.
- **Why care:** Dates, accounts, amounts, posting state, and period locks can change financial reports. Verify them against the source document before finalizing the record.

Before you begin

You need the Brisk permission for the action you are taking on taxes. If a Create, Edit, or Delete control is absent, do not work around it with another user’s account; ask an administrator to review your role.

Create a tax



The Taxes create screen in the Brisk documentation demo.

Create a tax after searching for the person, organization, item, location, or resource under alternate names and identifiers. Merge or correct an existing master record instead of creating a duplicate.

1. Select the business context first: **Liability Account**, and **Payee**.
2. Enter the required identifying and operational values: **Name**, and **Percent**.

3. Review the identifying information shown on the screen against the source document or approved setup decision.
4. Save the tax, then confirm **Name** on its detail page before continuing.

After saving: Verify this tax in **Commodity Items**, **Item Rows**, **Items**, and **Order Line Items**, plus the remaining screen fields before staff build new activity on it; correct ownership, classification, and active state now rather than after transactions accumulate.

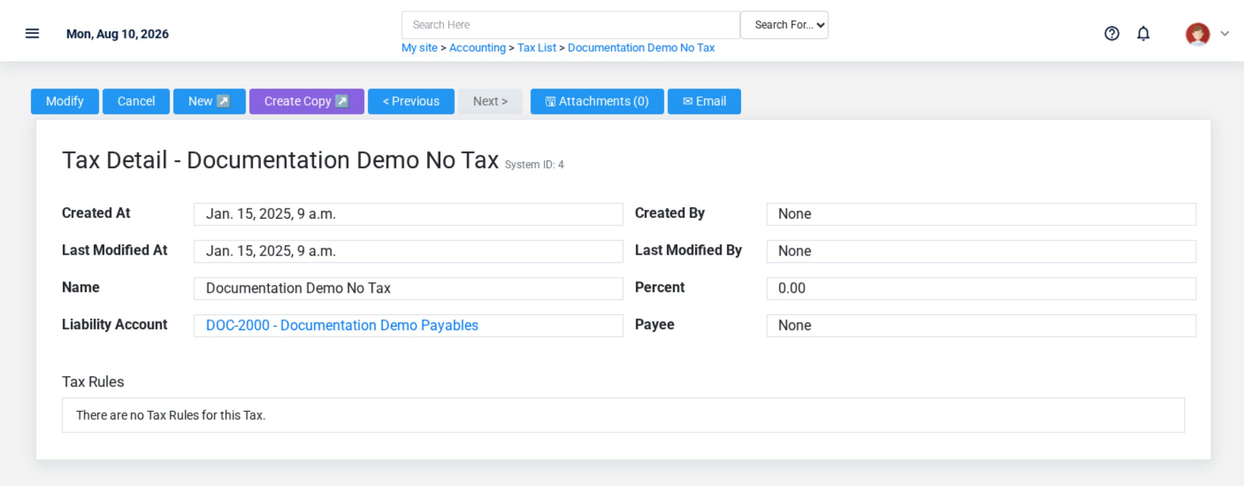
Delete a tax

Delete this tax only if it is an unused duplicate or setup mistake. Once other records refer to it, preserve that history and make the value inactive when the screen provides that option.

Before confirming, check for related **Commodity Items**, **Item Rows**, **Items**, **Order Line Items**, and **Quote Rows**, plus the remaining screen fields. Brisk may refuse deletion when another record depends on this one; resolve the duplicate or use the supported correction workflow instead of breaking the trail.

On the confirmation page, verify **Name**. After confirmation, return to the Taxes list and make sure only the intended tax was removed.

Review tax details



The Taxes detail screen in the Brisk documentation demo.

Use the detail page as the shared record of what this tax currently means. Verify **Name**, **Percent**, **Liability Account**, and **Payee** before relying on it for a decision.

Follow **Liability Account**, and **Payee** to determine whether the issue is on this tax or on one of those linked records.

Next check: Verify this tax in **Commodity Items**, **Item Rows**, **Items**, and **Order Line Items**, plus the remaining screen fields before staff build new activity on it; correct ownership, classification, and active state now rather than after transactions accumulate.

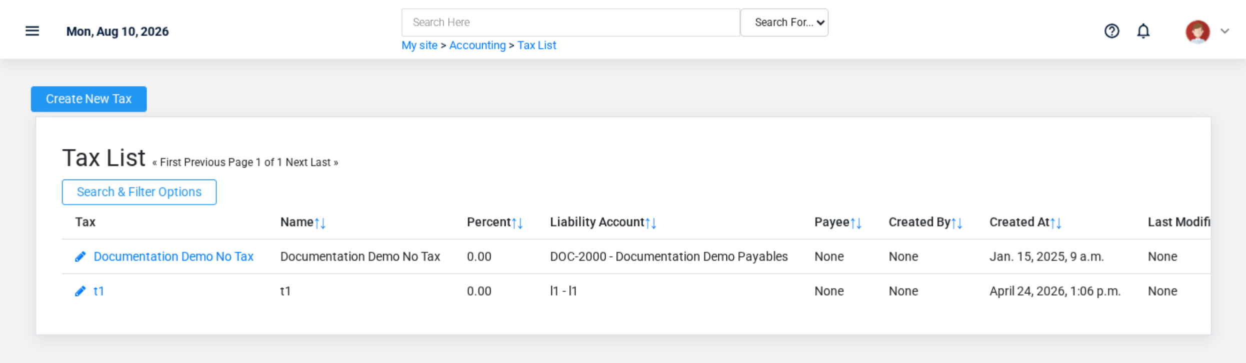
Edit an existing tax

Edit this tax to keep the same real-world party, item, location, or resource accurate. Do not repurpose it for a different entity after activity is attached.

1. Open the detail page. Compare **Liability Account**, and **Payee** with the supporting document or approved request.
2. Recheck **Liability Account**. These values are most likely to change account balances, financial periods, and statement results.
3. Save the change, return to the list, and confirm that the tax now appears under the expected **Name**.

After the change: Verify this tax in **Commodity Items**, **Item Rows**, **Items**, and **Order Line Items**, plus the remaining screen fields before staff build new activity on it; correct ownership, classification, and active state now rather than after transactions accumulate.

Find and review taxes



The Taxes list screen in the Brisk documentation demo.

Use the Taxes list to find the correct record before opening or changing it. Compare **Name**. Records with similar names or numbers can still belong to different **Liability Account**, and **Payee**.

- The initial order emphasizes **Name**. Select a column heading when you need a different comparison.

Open the tax whose **Name** match the task. If it is missing, clear the list filters and recheck the identifying information shown on the screen rather than creating a replacement immediately.

Fields and business rules

Brisk stores 4 user-relevant fields for this tax, including 2 linked-record selections and 0 controlled-choice fields. Create and edit screens may hide calculated or workflow-managed values from this full reference.

Field	Required	What it controls
Name	Yes	Set an easily understandable name for this tax.
Percent	Yes	Use this field to set the tax rate. For example, if you need to collect a 6 percent sales tax, this field should be set to 6.0.
Liability Account	No	Sets the GL account that tracks sales tax transactions.
Payee	No	For taxes with rates above 0, create a vendor in the system for the tax authority. This allows Brisk to keep track of your tax liabilities.

What happens next

Verify this tax in **Commodity Items**, **Item Rows**, **Items**, and **Order Line Items**, plus the remaining screen fields before staff build new activity on it; correct ownership, classification, and active state now rather than after transactions accumulate.

Common mistakes and troubleshooting

- **The record will not save:** Recheck **Name**, and **Percent** and any message beside the field. A required related record may also be inactive or unavailable to your role.
- **The values look right but the result is wrong:** Open **Liability Account**, and **Payee** from the detail page. Correct the specific relationship that is wrong instead of forcing a total or status to compensate for it.

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