

Tax Schedules in Series25 Pricing

[+ Click here to view related articles.](#)

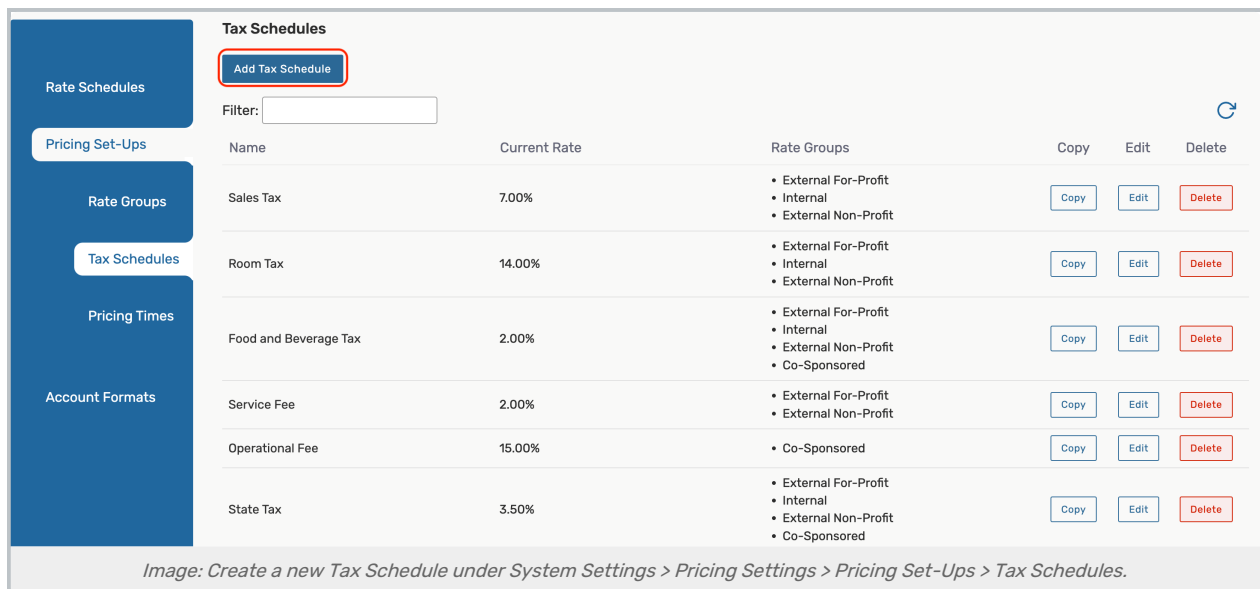
Tax schedules add extra fees to a line item on an invoice as a percentage of its value. By setting up multiple tax schedules, you can customize different rates based on the items included and the customers being billed.

Tax schedules can have multiple effective dates, so you can build in known tax increases ahead of time.

Once you've created a new tax schedule, it won't be immediately applied. You'll need to link it with specific [rate schedules](#) to see the effects. For example, you can choose to link a room tax with all your location rate schedules or a food tax with just your resource rate schedules that represent catering.

Adding and Editing Tax Schedules

1. In 25Live, use the **More** menu to navigate to **System Settings > Pricing Setting > Pricing Set-Ups > Tax Schedules**
2. Select the **Add Tax Schedule** button.



Tax Schedules

[Add Tax Schedule](#)

Filter:

Name	Current Rate	Rate Groups	Copy	Edit	Delete
Sales Tax	7.00%	<ul style="list-style-type: none"> External For-Profit Internal External Non-Profit 	Copy	Edit	Delete
Room Tax	14.00%	<ul style="list-style-type: none"> External For-Profit Internal External Non-Profit 	Copy	Edit	Delete
Food and Beverage Tax	2.00%	<ul style="list-style-type: none"> External For-Profit Internal External Non-Profit Co-Sponsored 	Copy	Edit	Delete
Service Fee	2.00%	<ul style="list-style-type: none"> External For-Profit External Non-Profit 	Copy	Edit	Delete
Operational Fee	15.00%	<ul style="list-style-type: none"> Co-Sponsored 	Copy	Edit	Delete
State Tax	3.50%	<ul style="list-style-type: none"> External For-Profit Internal External Non-Profit Co-Sponsored 	Copy	Edit	Delete

Image: Create a new Tax Schedule under System Settings > Pricing Settings > Pricing Set-Ups > Tax Schedules.

3. Enter a name for the tax schedule in the **Name** field.
4. Click **New Rate**
 - Enter a percentage value for the **Tax Rate** and a **Start Date** for this rate.
 - If you know the tax rate will change in the future, repeat this step to add a new rate and the date it should be effective.
5. Select the **Rate Groups** dropdown and tick the checkboxes of the [rate groups](#) that will be responsible for paying this tax. If you have any tax-exempt groups, leave them unselected. Click **Done**.
6. Click **Save**. A message will display confirming your success.

Create Tax Schedule

Name

Rates

×	Start Date	Tax Rate
	<input type="text" value="Fri Mar 24"/>	0.0%

[New Rate](#)

Rate Groups
Select Rate Group(s) associated with this tax schedule.

[Done](#)

[Save](#) [Cancel](#)

Image: Create Tax Schedule form

7. If you need to change any details of a tax schedule later on (such as adding a new rate) use the **Select a Tax Schedule** dropdown at the top of the form, make your changes, and save.

Video Walkthrough

Watch Andrea demonstrate how to set up your tax schedules in this short video.

PREVIOUS: [Rate Groups](#)

UP NEXT: [Rate Schedules](#)