



### 3 SET-UP STEP 3

## ADJUST SETTINGS AND SALES TAX

Click the GEAR in the top right and select ACCOUNT AND SETTINGS. Working down the options in the left menu, we are going to adjust several settings. To edit each section, click the small pencil in the top right of that section. When finished with all, click DONE in the bottom right of the screen.

- COMPANY tab
  - Company name:
    - » *Company name:* **[Your Name]'s Quincy Bookstore**
    - » *Legal name:* Turn the checkmark on
    - » *EIN/SSN:* Select EIN and enter **46-6521446**
  - Contact info:
    - » *Company email:* Same email you used to set up the company
    - » *Customer-facing email:* Leave checked on
    - » *Company phone:* **314-555-9876**
    - » *Website:* Leave blank
  - Company address:
    - » Enter **1055 Quincy Street** and select ENTER MANUALLY at the bottom of the search window
    - » Complete the fields with **1055 Quincy Street, St. Louis, MO, 63111**
    - » If prompted, select **YES, IT'S CORRECT**
- SALES tab
  - Sales form content:
    - » *Discount:* Turn on
    - » *Tags:* Turn off
- ADVANCED tab
  - Chart of accounts:
    - » *Enable account numbers:* Turn on
    - » *Show account numbers:* Checkmark on



- Other preferences:
  - » *Sign me out if inactive for:* Set to 3 HOURS
- Set up *Sales Tax*:
  - From the Dashboard, click TAXES in the left menu and select SALES TAX.
  - Select USE AUTOMATIC SALES TAX
  - Verify the address is correct and click NEXT
  - *Do you need to collect sales tax outside of Missouri?* – Select NO and click NEXT
  - Click CREATE AN INVOICE
    - » In the bottom right of the invoice, pull down the menu with BASED ON LOCATION
    - » Select ADD A RATE
    - » Select SINGLE
    - » *Name:* MO Sales Tax
    - » *Agency:* Missouri Department of Revenue
    - » *Rate:* 8%
    - » In the bottom left of the Invoice window, click CANCEL and select YES to Do you want to leave without saving?
  - When asked about *Filing Frequency*, select YEARLY and SAVE

**NOTES**

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