

How do I create a client invoice to include vat/tax? (1)



1. Go to the Job Information window – **Menu > Job Cost > Creation > Job Information**
2. Click on the Binoculars to perform a search. Enter search criterion and click on the row of the job in question
3. Verify the following:
 - Make sure that the tax box is checked
 - Select the proper reporting code (select the proper tax code from the pull down menu).
4. Go to the Invoice Selection window for the job in question – **Menu > Job Cost > Invoicing > Invoice Selection**

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How do I create a client invoice to include vat/tax? (2)



5. Go to **Action > Rederive Tax Code** or press the **RTC** button
6. Go to **Action Approve Invoice Selection** or press the **AIS** button
7. Print a draft of the invoice (the tax should now appear).

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How do I create a client invoice to include vat/tax? (3)



To add Tax/Vat to a specific line in the itemized Invoice Selection window - **Menu > Job Cost > Invoicing > Itemized Invoice Selection.**

1. Highlight the line in question
2. Make sure that the tax code is filled in with the appropriate code in the table part of the window.
3. Go to the Action Menu and Rederive Tax Code – **Action > Rederive Tax Code** or press the **RTC** button
4. Go to the Action Menu and Approve Invoice Selection – **Action > Approve Invoice Selection** or press the **AIS** button
5. Print a draft invoice and confirm that the tax now appears.

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