

## 3.18 Equipment Asset Tax

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### Overview

Many times customers in the United States are required to pay personal property taxes. This is usually thought of as land and buildings but regularly includes vehicles and equipment. This is most often imposed as a local or state tax. Use the setup procedure below to establish the setup codes and apply them to customer records.

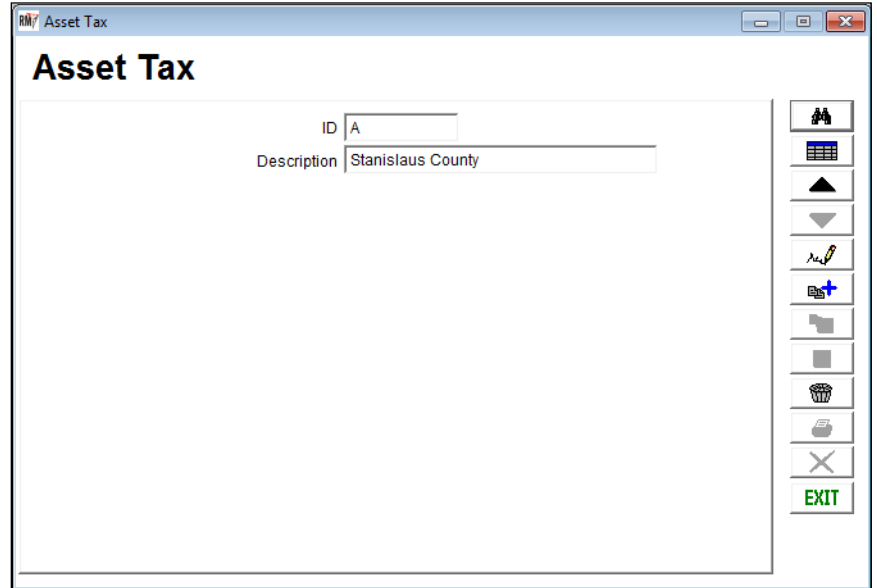
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### Asset Tax Setup

The *Asset Tax Code* is used to identify the location of each piece of equipment on a pre-determined date.

The asset tax code is established in *Lists > Accounting Setup*. The setup screen is shown below.

The two fields on the graphic below are to only provide the code identification and the local geographic area covered by this code. Each customer will be assigned an asset tax code on the *Route* tab of the Customer *Information* screen.



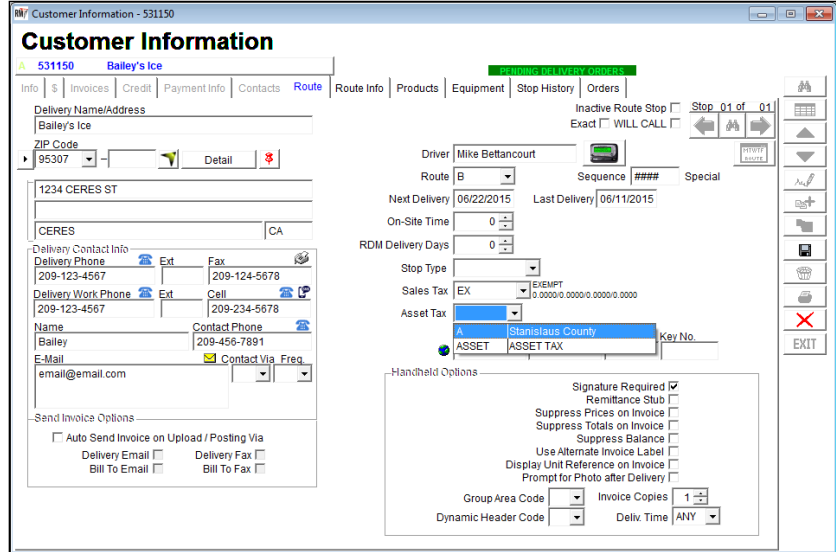
**Fields:**

**ID:** Enter up to two characters that will represent the *Asset Tax Code*.

**Description:** Enter a description for the *Asset Tax Code*. This is usually the description of the geographic area levying the tax.

## Customer Information

The required *Asset Tax Code* is assigned as shown in the right center of the screen below. Select the appropriate code from the drop down menu of asset tax codes made in the graphic above.



**Customer Information**  
A 531150 Bailey's Ice

Info | Invoices | Credit | Payment Info | Contacts | **Route** | Route Info | Products | Equipment | Stop History | Orders

Delivery Name/Address: Bailey's Ice  
 ZIP Code: 95307  
 1234 CERES ST  
 CERES CA

Delivery Contact Info:  
 Delivery Phone: 209-123-4567 Ext: Fax: 209-124-5678  
 Delivery Work Phone: 209-123-4567 Ext: Cell: 209-234-5678  
 Name: Bailey Contact Phone: 209-456-7891  
 E-Mail: email@email.com Contact Via: Freq:

Send Invoice Options:  
 Auto Send Invoice on Upload / Posting Via  
 Delivery Email  Delivery Fax   
 Bill To Email  Bill To Fax

Driver: Mike Bettancourt  
 Route: B Sequence: ### Special  
 Next Delivery: 06/22/2015 Last Delivery: 06/11/2015  
 On-Site Time: 0 RDM Delivery Days: 0  
 Stop Type: Sales Tax: EX (0.0000/0.0000/0.0000/0.0000)  
 Asset Tax: **A Stanislaus County** Key No.  
 ASSET ASSET TAX

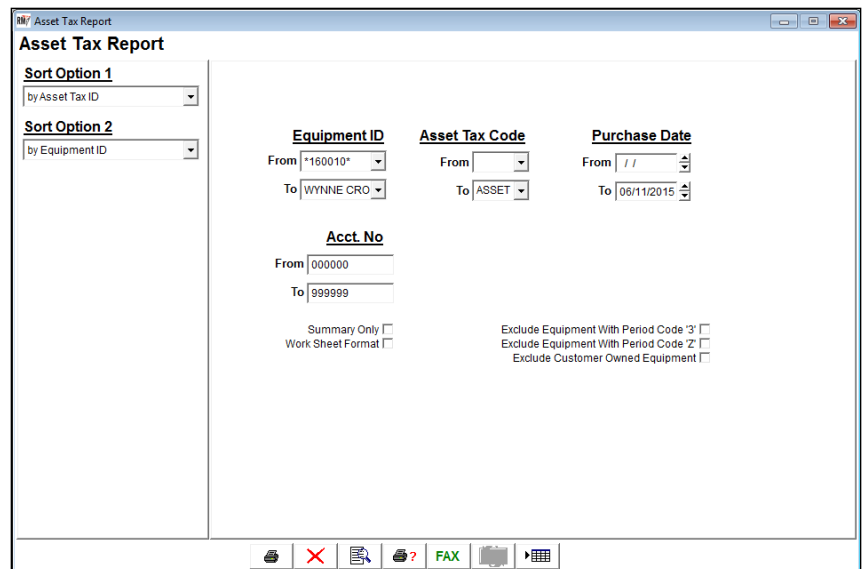
Handheld Options:  
 Signature Required  
 Remittance Stub  
 Suppress Prices on Invoice  
 Suppress Totals on Invoice  
 Suppress Balance  
 Use Alternate Invoice Label  
 Display Unit Reference on Invoice  
 Prompt for Photo after Delivery  
 Group Area Code: Invoice Copies: 1  
 Dynamic Header Code: Deliv Time: ANY

*Asset Tax Codes* are not normally assigned to a piece of equipment because equipment can be moved to different taxing jurisdictions. Equipment valuation is established under *Lists > Equipment > Equipment Master List*.

## Reports

The *Asset Tax Report* is provided by ARS so the location of each piece of equipment subject taxation is properly identified. The equipment owned by your company is subject to this taxation.

Note the exclusions for equipment with *Period Codes* 2 and 3. *Period Code 2* is for special rental agreements. *Period Code 3* is for sold equipment. If special help is needed in this area, contact Advantage Route Systems.



The screenshot shows the 'Asset Tax Report' window. On the left, there are two 'Sort Option' dropdown menus: 'Sort Option 1' set to 'by Asset Tax ID' and 'Sort Option 2' set to 'by Equipment ID'. The main area contains three columns of filters: 'Equipment ID' (From: \*160010\*, To: WYNNNE CRO), 'Asset Tax Code' (From: [blank], To: ASSET), and 'Purchase Date' (From: / /, To: 06/11/2015). Below these is an 'Acct. No' section with 'From: 000000' and 'To: 999999'. At the bottom right, there are three checkboxes: 'Summary Only' (unchecked), 'Work Sheet Format' (unchecked), and 'Exclude Equipment With Period Code 3' (unchecked). Below that are 'Exclude Equipment With Period Code 2' (unchecked) and 'Exclude Customer Owned Equipment' (unchecked). A toolbar at the bottom includes icons for print, close, help, and other functions.

## Summary

The Asset Tax option is required in many taxing authorities. The process described above makes it possible to keep accurate records of taxable assets. We hope the information presented above will be useful for you as well.

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