



## Smart Rule - Customer must have a Tax Group Set

**To ensure that all Customers within Sage Intacct have a Tax Group applied create the following Smart Rule**

Navigate to the Smart Rule Wizard either by Customisation Services or Platform Services > Smart Rules > Add

The wizard guides you through the process of designing your smart rule

Step 1 Choose object to extend Step 1 of 3 Select object Next >

Owner object  
Customer

\* Required

**Step 1** Choose object to extend **Select** Customer | **Click** Next

Step 2 Select rule properties Step 2 of 3 Select properties << Back Next >>

Type  
Error

Events \*  
Selected items (2) [Add or edit](#)  
Add ×  
Set ×

Condition \*  
{!CUSTOMER.DISPLAYCONTACT.TAXGROUP!} != ""

Note: Use the yyyy.mm.dd format for date values

Error message \*  
Customer must have a tax group applied

**Step 2 a.** Type **Select** Error | **b.** Events **Select** Add & Set | **c.** Condition **Enter** `{!CUSTOMER.DISPLAYCONTACT.TAXGROUP!} != ""` | **d.** Error message **Enter** Customer must have a tax group applied | **Click** Next



Step 3 Select deployment options Step 3 of 3 Save » « Back Done

Smart rule ID \*

Description

Status

\* Required

**Step 3** Smart rule ID **Enter** CUSTOMER\_TAXGROUP | **Click** Save