



Smart Rule - Customer must have a Tax Schedule Set

To ensure that all Customers within Sage Intacct have a Tax Schedule 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.TAXSCHEDULE!} != ''
```

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

Error message *

Customer must have a tax schedule applied

Step 2 a. Type **Select** Error | **b.** Events **Select** Add & Set | **c.** Condition **Enter** `{!CUSTOMER.DISPLAYCONTACT.TAXSCHEDULE!} != ''` | **d.** Error message **Enter** Customer must have a tax schedule 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_TAXSCHEDULE | **Click** Save