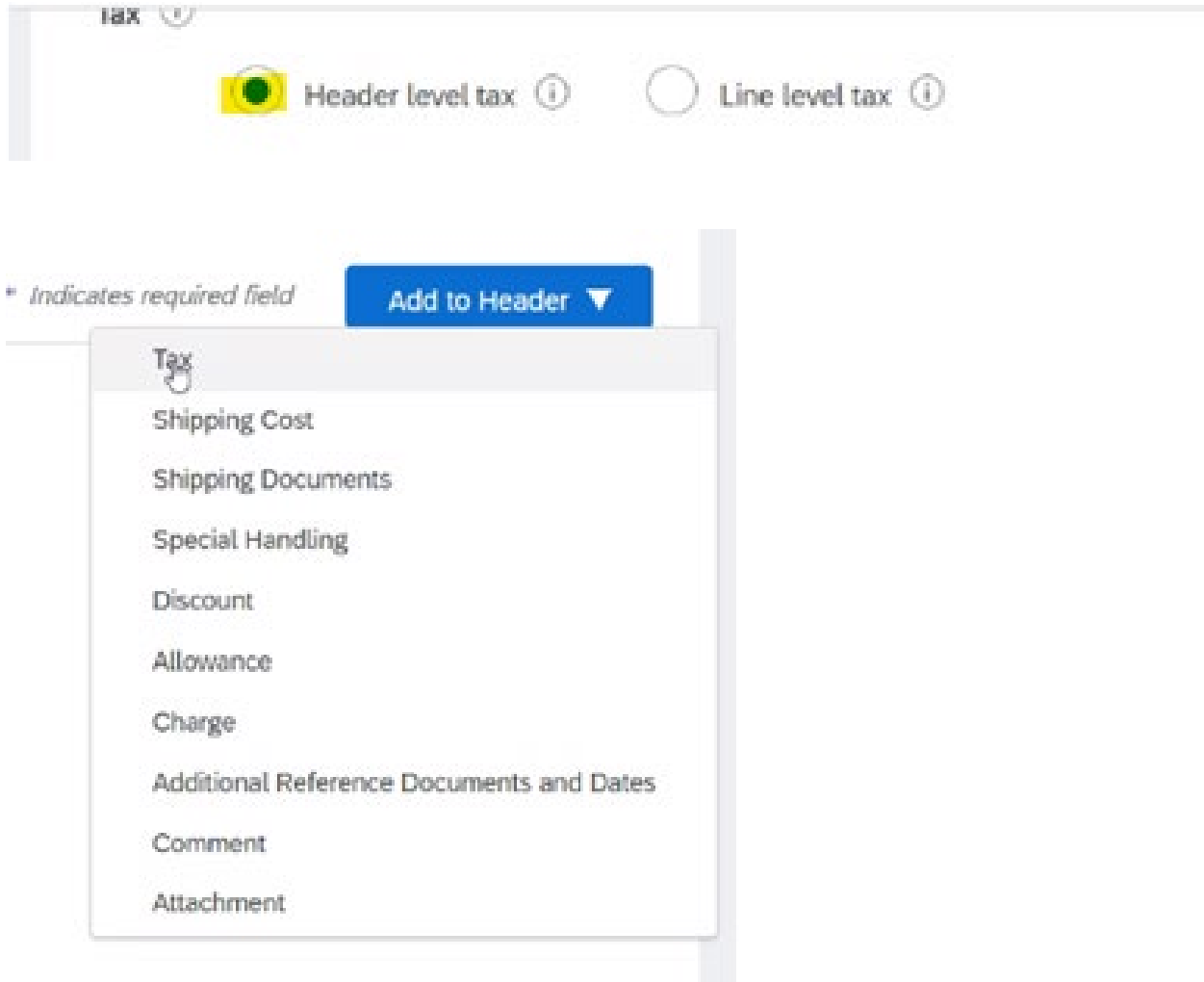In the tax section of the screen when loading the invoice, header level tax needs to first be selected before the tax option can be selected from the add to header drop down menu in the upper right of the screen.

Tax ⓘ

(●) Header level tax ⓘ   (○) Line level tax ⓘ

* Indicates required field   **Add to Header ▼**

Tax

Shipping Cost

Shipping Documents

Special Handling

Discount

Allowance

Charge

Additional Reference Documents and Dates

Comment

Attachment

This must be added and the tax amount completed or at least input as $0.00 even if there is not tax due.
The Tax Rate(%) needs be input as well even if 0.
The Taxable Amount field should autofill with your invoice amount as you complete your entry.

Category:*	Sales Tax		Taxable Amount:	$499.00 USD
Location:			Tax Rate Type:	
Description:			Rate(%):	0
Regime:			Tax Amount:	$0.00 USD

Always include one header tax line. If you have multiple please consolidate them into one.

Please contact WFA@Schwab.com if you need further assistance.