

User Manual

January 19, 2006

Tax by Tax Table – v1.0 For Retail Pro® v8.51 and Above

Overview

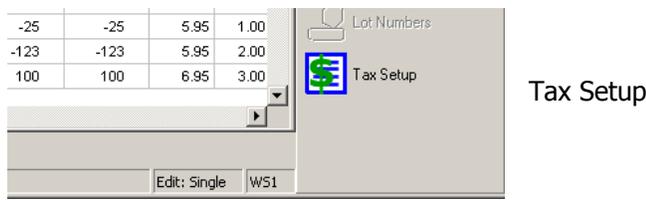
M&M's Tax by Tax Table modification uses a tax table for calculating sales tax rather than the internal RPro tax calculation.

The modification should be installed at the Main and/or any Remote where sales tax by table is required.

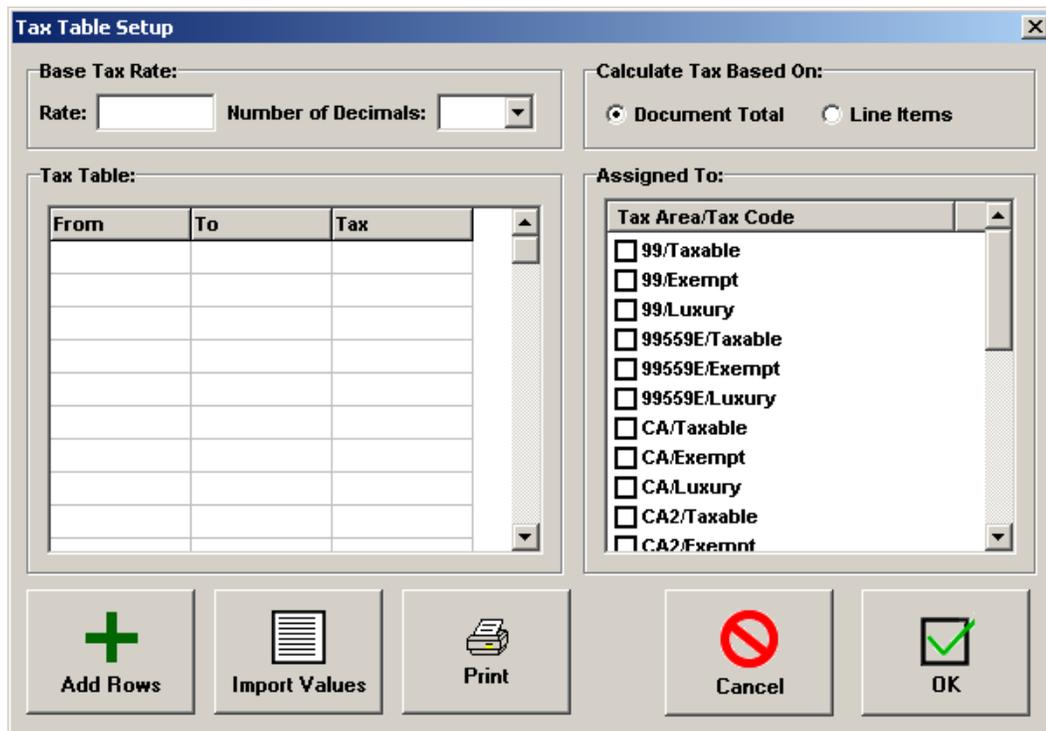
Tax Table Setup

Setting up the tax table must be done at each store (Main and all Remotes) where the modification will be used.

To set up the tax table, go to Merchandise>Inventory in Retail Pro and click the Tax Setup button:



The Tax Table Setup screen will be displayed:



This screen is used to enter all of the information needed to use tax by table.

Base Tax Rate

Enter the base tax rate in the text box. This should be entered as the rate plus any decimals. For example, 6-1/4% tax would be entered as 6.25.

Select the number of decimals that should be displayed for the tax rate. (Note that this only applies to the tax rate display).

Calculate Tax Based On

Select Document Total or Line Items.

If Document Total is selected, then the total tax for the Receipt or Sales Order is based on the taxable total of the document and the tax table. If Line Items is selected, then the tax is set for each line item based on the tax table.

Selecting Tax Areas/Tax Codes

A list of all of the Tax Area/Tax Code combinations in your Retail Pro setup is displayed in the right hand panel. Check each Tax Areas/Tax Code combination that should use the tax table for calculating tax.

Do NOT select a Tax Area/Tax Code combination if that combination is tax exempt.

If a Tax Area/Tax Code combination is NOT selected, then tax will be calculated using the standard Retail Pro routines.

Setting the Tax Table

The grid in the left hand panel will contain the Tax Table values.

Enter a From, To and Tax Amount in each row of the grid. These should all be numeric values. Blank rows have no effect.

If you need to add more rows to the grid, click the Add Rows button.

Blank rows will not be stored.

IMPORTANT: The maximum "To" value in the table is VERY important. The modification will use the maximum "To" value as the cut-off point to determine where the table value no longer apply and a straight tax percent should be used.

For example, the Base Rate of the table is 6% and the maximum "To" value is 10.00. The tax amount on a sale of \$22.54 would be calculated as 6% of 20.00 plus the tax amount from the table for 2.54.

Importing the Tax Table Values

You can also import the tax table data from a text file with comma-separated values. The file should have one line for each row of the grid. Each line of the file should be in the format:

FromValue,ToValue,TaxAmount

For example:

0.01,0.10,0.00
0.11,0.17,0.01
0.18,0.34,0.02
etc.

To import the tax table data, click the Import Values button and enter or browse for the import file. The grid values will be imported from the file. The imported values will replace any values in the grid.

Printing the Tax Table

Click the Print button to print the tax table data.

Tax Table Example

Here is a screen shot of a completed tax table:

Tax Table Setup

Base Tax Rate:
Rate: Number of Decimals:

Calculate Tax Based On:
 Document Total Line Items

Tax Table:

From	To	Tax
8.51	8.67	0.52
8.68	8.84	0.53
8.85	9.10	0.54
9.11	9.17	0.55
9.18	9.34	0.56
9.35	9.50	0.57
9.51	9.67	0.58
9.68	9.84	0.59
9.85	10.00	0.60

Assigned To:

- 99/Taxable
- 99/Exempt
- 99/Luxury
- 99559E/Taxable
- 99559E/Exempt
- 99559E/Luxury
- CA/Taxable
- CA/Exempt
- CA/Luxury
- CA2/Taxable
- CA2/Exemnt

Buttons: Add Rows, Import Values, Print, Cancel, OK

Operation at POS

With the custom fields correctly setup for the Receipt and Sales Order screens and document designs, operation at POS is transparent to the Cashier.

As items are placed on the Receipt or Sales Order, the correct tax amounts are calculated.

Note that if the Tax % field is included in the item grids, this field is NOT going to show the tax percent associated with the Tax Area for the Receipt.