



Tax Schedules

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Overview

SalesPad does *not* calculate sales tax, but recognizes tax schedules predefined within Dynamics GP. If a customer and/or an item have been set up in GP as taxable, based on tax schedule and details, sales tax will be calculated and appear on a SalesPad sales document. Sales tax calculations may also come from a supported 3rd party integration such as CCH or AvaTax.*

Note: If the Use Shipping Method When Selecting Default Tax Schedule setting (Company Setup Options) is not selected in Dynamics GP, it must also be False in SalesPad.

Note: Although in Dynamics GP you can quickly change whether an item is taxed as needed, items set up as non-taxable are *never* taxed in SalesPad. This cannot be changed on the sales document.

In SalesPad, tax amount appears in the Totals section on the sales document, after the document is saved. The field cannot be edited:

Totals	
Misc Charge:	0.00
Discounts:	0.00
Freight:	0.00
Tax:	126.00
Total:	1,925.95
Payment:	<u>0.00</u>

If the sales document's shipping method is a delivery type shipping method, tax is calculated based on the tax schedule on the Ship To address. If the shipping method is a pickup type shipping method, tax is calculated by the Site ID on the sales document header.

Tax Schedules in SalesPad

Tax schedules are configured in Dynamics GP. In SalesPad, users can change the Tax Schedule on the following screens:

1. On the sales document, the Tax Schedule column of the Line Items tab:

Whse:	WAREHOUSE	Created By:	test	Ship Complete			
Line Items Notes Adrs Holds User Fields Audit Related Documents Purchases Tracking Numbers							
New Delete Insert Item Number A100 Item Class Code							
Item	Description	DS	Qty	UoFM	xNew	Tax Schedule	Price
A100	Audio System	<input type="checkbox"/>	1	Each		USASTCITY-6*	39.95

If the Tax Schedule column is not visible, right-click anywhere on the column header and select Column Chooser. Drag-and-drop Tax Schedule onto the column header. To change the Tax Schedule, highlight the field to access the dropdown choices.

- On the customer contact card, the Tax Code field (Contact Addresses tab > select an address code to open the Contact card):

Electrical x Contact: PRIMARY/Bob Fitz x

Contact Information Contact Type: Phone 1: (425) 555-0101 Phone 2: Phone 3: Fax: (312) 555-0101 Email: erin@salespad.net Web Site:	Other Address Info Warehouse: Sales Rep: Sales Territory: Ship Method: LOCAL DELIVERY Tax Code: USASTCITY-6* <input type="checkbox"/> Do Not Mail <input type="checkbox"/> Do Not Email <input type="checkbox"/> Do Not Fax
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CANPQGSTQST+7*	QUEBEC GST/QST-Purcha...
CAPQGSTQST-7*	QUEBEC GST/QST on Sales
COMPANYPUR	ILL State Tax
COMPANYSALES	ILL State Sales Tax
CPEIGSTPST-7*	PEI GST/PST on Sales
ILLINOIS	Illinois Purchase Tax
ILLINOIS-S*	Sales Tax-IL Pickup
NEWGST+125	GST on Purchases-New Z...
NEWGST-125	GST on Sales-New Zealand
UKVAT+175	VAT on Purchases-UK
UKVAT-175	VAT on Sales-United King...
USALLEXMPT-0	USA-Exempt Sales
USASTCITY-6*	State Tax-USA
USAUSSTCITY+0	Exempt Purchases-USA
USAUSSTCITY+6*	US State/City Tax-Purcha...

Contact User Fields

To change the contact's tax schedule, click the Tax Code field to access the dropdown.

- On the sales document, the Tax Schedule field on the **Adrs** tab:

Line Items Notes Adrs Holds User Fields Audit Related Documents Purchases Tracking Numbers	Bill Ad
Ship To Address Address Code: WAREHOUSE Ship To Name: Aaron Fitz Electrical Ship To Contact: Bob Fitz Address: 11403 45 St. South City: Chicago State: IL Zip: 60603-0776 Country: USA	Other Information Phone 1: (312) 555-0102 Phone 2: (312) 555-0102 Phone 3: Fax: (312) 555-0102 UPS Zone: Tax Schedule: USASTCITY-6* Notification(s): Email:

ILLINOIS-S*
NEWGST+125
NEWGST-125
UKVAT+175
UKVAT-175
USALLEXMPT-0
USASTCITY-6*

To change the tax schedule, click on the field to access the dropdown.

Note: When changing the tax schedule, you must click off the field in order for the change to be recognized. (Example: Select a new schedule, then click inside the Phone field before closing.)

Dynamics GP Tax Schedule Settings

1. Open the **Microsoft Dynamics GP** dropdown and then go to Tools > Setup > Company > Tax Schedules to open the Tax Schedule Maintenance window where you can enter new tax schedules or edit current schedules

Tax Schedule Maintenance

File Edit Tools Help sa Fabrikam, Inc. 4/12/2017

Save Delete

Tax Schedule ID [Lookup Icon]

Description


Available Tax Detail IDs

Description
AUSSTE+PS0N0
AUSSTE+PS20N0
AUSSTE+PS20N0
CANABPST+PS6N0
CANABPST+PS6N0
CANGST+PS7N0
CANGST+PS7T0
CANGST+TIP7N0
CANGST+TIP7T0
CANGST+PS7N0
CANGST+PS7T0
CANGST+TIP7N0
CANGST+TIP7T0
CANONPST+PS8N0
CANONPST+PS8N0
CANPQQST+PS8N0

Insert >> Remove Copy

Selected Tax Detail IDs

Description

2. Click the **Lookup** icon () by the Tax Schedule ID field to open the "Tax Schedules" window where all available GP tax schedules and details are visible. These are all incorporated within SalesPad:

Tax Schedules sa Fabrikam, Inc. 4/12/2017

File Edit Tools Help

Find by Tax Schedule ID New Open

View: All Tax Schedules; by Tax Schedule ID

Tax Schedule ID	Description
AUSNSWST+0	Exempt Purchases-Australia
AUSNSWST+20	20% Purchase Tax-Australia
AUSNSWST-20	Sales Tax-Australia
CANALLGST+7	GST on Purchases-Canada
CANALLGST-7	GST on Sales-Canada
CANALLZR+0	Zero-Rated Purchase-Canada
CANGSTINC+7	GST Inc in Price-Ontario Can
CANGSTINC-7	GST Included in Price-Canada
CANONGSTPST+7*	GST/PST on Purchase-Canada
CANPQGSTQST+7*	QUEBEC GST/QST-Purchases
CAPQGSTQST-7*	QUEBEC GST/QST on Sales
COMPANYPUR	ILL State Tax

Select Cancel

Dynamics GP Inventory Site Tax Settings

1. Go to Cards > Inventory > Site to open the "Site Maintenance" window.

Site Maintenance sa Fabrikam, Inc. 4/12/2017

File Edit Tools Help

Save Clear Delete

Site ID

Description

Address

City

State

ZIP Code

Country Code

Country

Account Segment ID:
Segment1

Phone 1

Phone 2


Phone 3

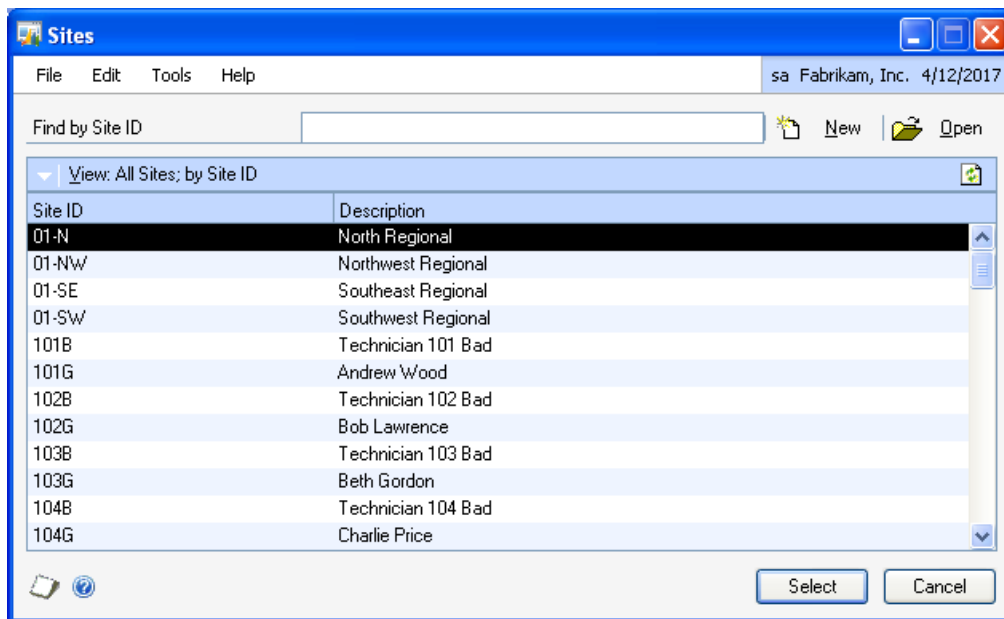
Fax

Tax Schedule ID:
[Sales](#)
[Purchases](#)

Bins Planning Assign

by Site ID

2. Click on the **Lookup** icon , located to the far right in the Site ID field, to open the Sites screen.



- Click on the desired site ID. This will return you to the "Site Maintenance" window, with the appropriate fields populated with your selection. The Tax Schedule ID column should now be populated.
- Click on the **Lookup** icon (it looks like a magnifying glass) on the far right of the Sales line to display more in depth tax scheduling information on the Tax Schedules window.

Site ID	Description
01-N	North Regional

Address: 1750 North Kingbury St

City: Chicago

State: IL

ZIP Code: 60614

Country Code:

Country:

Account Segment ID: 999

Division: 999

Phone 1: (312) 664-3500 Ext. 0000

Phone 2: (312) 664-2340 Ext. 0000

Phone 3:

Fax: (000) 000-0000 Ext. 0000

Tax Schedule ID: ALL DETAILS

Sales ALL DETAILS

Purchases

Bins Planning Assign

- Highlight a Tax Schedule and click **Select** to select the desired Tax Schedule ID for that that site

***Note:** While available as part of the standard Settings and Security in SalesPad, interfaces with third party products were created on a custom basis for a specific customer configuration. Please contact SalesPad to confirm versions of SalesPad and these third party products in which this interface is currently supported. If you need functionality beyond the features outlined in this document, please contact your SalesPad Partner or SalesPad Solutions to receive a quote on support for the desired version or functionality.