

USER GUIDE

Created by MyCRM Ltd

MyTax Calculations

Setup and Configuration Guide

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MyCRM Ltd 6/4/2018



About This Guide

The purpose of this guide is to give a high-level overview of how to configure and setup MyTax 365 within your Microsoft Dynamics 365 environment.

Installation

MyTax 365 can be installed from either the MyCRM Download Centre or Microsoft AppSource as a full 14 day trial. The functionality is not restricted in anyway, and solution can be purchased either on subscription per user or as perpetual licence with annual support.

From Microsoft AppSource, the solution is installed along with the MyCRM Download Centre application, from the MyCRM Download Centre you will need to install the Download Centre application and then select the MyTax application from within your Microsoft Dynamics 365 environment.

Users will need role based security to be set to access the MyCRM licence as read only to make use of the solution. Your products will need to be configured on the product screen to enable taxation, and along with global configuration settings being set in the solution by an administrator.

Setup your defined tax rates under settings, an extension entity called Tax rate exists for you to have one or more tax rates.

Configuring MyTax

MyCRM MyTax 365 requires configuration before it can be used in production, the solution interacts with Opportunity, Quote, Order and Invoice records. Please note that the install should be planned as there are 4 key elements that need to be configured.

Setting up global configuration settings

The first step is to open the MyTax 365 (eTax) solution from the Microsoft Dynamics solutions area

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	Name	Display Name	Version	Installed On 4	Package T	Publisher	Description		T									Ö
8	etax	eras	2.0.0.2018	02/07/2010	Managed	MySKM Extended												
	#Survey	eSurvey	1.1.3.2017	08/06/2018	Managed	MyCRM Services												
	eWorkflow	eWorkflow	1.1.0.2017	06/06/2018	Managed	MyCRM Extended	A Worflow helpe	er solution from MyCRM	(
	ePlanner	ePlanner	2.0.3.2018	06/06/2010	Managed	MyCRM Extended												

Select and open the solution for MyTax 365 (eTax) and navigate to the Configuration page at the top of the solution Window.

	ov Dependencies 🍇 Actions •			0					
Solution: eTax.									
You cannot directly edit the com	ponents within a managed solution. If the managed properties for solution components are set to allo	e outomization, you can edit them in the Customizations area or from an	nother unmanaged solution.						
rtion eTax									
Information Configuration	eTax Configuration								
Components Institus Dotion Sets	Installing / Uninstalling Mappings BACKGROUND								
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Dashboards	Order Detail and Invoice Detail								
Reports	INSTALL MAPPINGS								
Article Templates	To install the Mappings required for eTax please click the Install button								
Contract Templates Crnail Templates	Install	Install additional							
Security Roles	Settings	(Decemberded)							
I* Routing Rule Sets	CRM SETTINGS	(Recommended)							
W, Record Creation and Upda	You can change the following settings by going to Settings > Administration > System Settings and going to the Sales tab. We've put them here for you to make things easier for you.								
RAS									
RAS	Set pricing calculation preference								
SLAs Apper Controls Controls Controls Controls	Set pricing calculation preference Use system pricing calculation		Yes (Use CRM to calculate prices)	~					
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SLAs Acce Acce Visual Ently Data Povices Visual Ently Data Sources	Set pricing calculation preterence Use system pricing calculation Set whether a discount is applied as a line item or per unit Discount calculation method	Select to use MyTax 365 (eTax) to perfrom	Ves (Use CRM to calculate prices) Line Item	×					
Baks Anne Controls Controls	Set pricing calculation preference Use system pricing calculation Set whether a discount is applied as a line item or per unit Discount calculation method ETAX SETTINGS	Select to use MyTax 365 (eTax) to perfrom calculations	Yes (Use CRM to calculate prices) Line Item	×					
Bake Bake Controls Controls	Set pricting calculation preference Use system pricing calculation Set whether a discount is applied as a line item or per unit Discount calculation method EFAX_SETTINGS C et al. Is not being used Preference above to No (Use eTax to cal	Select to use MyTax 365 (eTax) to perfrom calculations	Ves (Use CRM to calculate prices) Line Item	y v					

Additional relationship mappings are required to enable MyTax to function correctly. Select the Install button which will configure your Microsoft Dynamics 365.

Then select the calculation preference dropdown and set to "Use MyTax (eTax) to calculate prices"

The configuration page will display as the following:

eTax Configuration		
Unfortunately creating these mappings against the Opportunity Products and Quote Products / Line Items Products.	is not available in the Solution architecture of Microsoft Dynamics CRM and needs to be created manually. The	same is also true for the Order Products and Invoice
Collapse		
MAPPINGS		
Opportunity Product and Quote Detail Quote Detail Order Detail Order Detail		
UNINSTALL MAPPINGS		
To remove the Mappings required for eTax please click the Uninstall button.		
Uninstall		
Settings		
CRM SETTINGS		
You can change the following settings by going to Settings > Administration > System Settings and going	ig to the Sales tab. We've put them here for you to make things easier for you.	
Set pricing calculation preference		
Use system pricing calculation	No (Use eTax to calculate prices)	
Set whether a discount is applied as a line item or per unit		
Discount calculation method	Line Item	~
ETAX SETTINGS © cTax is being used The following settings can be used to customise how eTax performs calculations.		
Sat substhee to calculate Tay by Line Item		
Tax Calculation Method	The second s	
	Line item (i.e. Quote Detait)	
Set whether to calculate tax for Inactive Tax Ratinga 🕕		
Calculate Inactive Tax Ratings	Yes	×.
Set if the base amount on the line item is the pre-tax amount 0		
Set Base Amount to Pre-Tax Amount	No (Quantity * Price Per Unit)	×
Use total number of units in Per Unit Discount calculation method 0		
Set Per Unit Discount Calculation Quantity	Line Item Quantity	×
Set whether to calculate Tax on the freight amount		
Calculate Tax On Freight Amount	Yes	~
OPPORTUNITY ONLY SETTINGS		
Set whether to include Tax when calculating the Estimated Revenue		
Include Tax in estimated revenue	Yes	v

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Set whether to include Freight when calculating the Estimated Revenue Include Freight in estimated revenue

Save Settings

There are a number of options to define how MyTax 365 (eTax) works within your Microsoft Dynamics 365 environment.

Yes

The tax on a record can be set to calculate at the top level or at the line item level. You will have the option to use just active tax rates or all. As an administrator you will have access to tax options and be able to set the "Base Amount Field" so that it is populated with or without the discount. You will have the option to set the discounts at the line level or at the total unit's level.

MyTax 365 also provides settings for calculating the Tax on the freight amount, calculating tax on the estimated revenue if required, and settings to calculate the estimated revenue with or without freight.

MyTax 365 has been designed to give the maximum level of configuration and flexibility when calculating tax rate amounts on the Microsoft Dynamics Opportunity, Quote, Order and Invoice record types.

Setting up Tax Rates

MyTax 365, comes with an extension entity so that it is easy to create active Tax Rates which have different values.



A tax rate record only has 3 fields that need to be completed, as these are setup, they will become available as a lookup on related entities.

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	TAX RATING INFORMATION					
	20% =					
	«General					
	Name 20%					
	Ruting* 25.00 Defuils Rating Yes					

There is no limitation to the number of Tax rates that can be created, however, we recommend that you do not have duplicated values.

Configuring Products

For MyTax 365 to calculate tax on product prices and work with products that have been defined in your Microsoft Dynamics 365, you will need to set up products individually as being taxable or enabling the tax calculation to be applied.

Each product that requires tax to be applied will need to be set and this is a very simple update. From within your Microsoft Dynamics 365 open the individual product screens:



III Dynamics 365 - Sales - Products > Pr	roduct: Product 1 >				+ 7	0	2
PREVIEW 40 CLONE W REVISE K RETRE 1 DELETE 5 CON	NVERT TO KIT 🚦 PROCESS - 🚥 EMAIL A LINE 💰 RUN WORKFLOW 🚥					÷.	XRA
PRODUCT Product: Product 1 =	=			Statur* Active			
- SUMMARY					í		
Name Product 1 Product 10 P1 Family Herarchy Valid From 01/06/2018 Valid To 31/05/2020 Description This is a commo Tax Applicable Yes PRODUCT PROPERTIES	Set if the product is taxable with in the product record	Unt Group * Detault Unt * Detault Price List * Decimals Supported * Subject	Default Unit Primary Unit Default Priore Exit 2				

Update and save the record, from this point forward the tax will be calculated on this product and no further action is required.

Confirming User Access

All of the MyCRM extension solutions are licenced in the same way and use the MyCRM Download Centre to do this. Users that need to make use of one or more of the MyCRM solutions including MyTax 365 will need to have user permission updated.

etails Core Records Marketing	Sales	Service Bu	siness Management	Servic	e Management	Customization	Missir	ng Entities	Business Process Flows Custom Entiti
ntity	Create	Read	Write	Delete	Append	Append To	Assign	Share	
to Name/Number Rule	0	0	0	0	0	0			
tity Geocode Configuration	0	•	0	0	0	0			
ter	0	0	0	0	0	0	0	0	
st Name	0	0	0	0	0	0			
breakersconfig	0	0	0	0	0	0	0	0	
ap Configuration	0	•	0	0	0	0	0	0	
ap Layer	0	•	0	0	0	0			
ap Pivot Rule	0	٠	0	0	0	0			
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otes analysis Config	0	0	0	0	0	0	0	0	Set Dynamics
Data v4 Data Source	0	0	0	0	0	0			365 Security
gInsights User Dashboard Definition	0	0	0	0	0	0	0	0	role under
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For Additional Information

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