

Created by MyCRM Ltd

MyTax Calculations

Setup and Configuration Guide

REF – MyTax.Configuration.Guide.pdf

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.

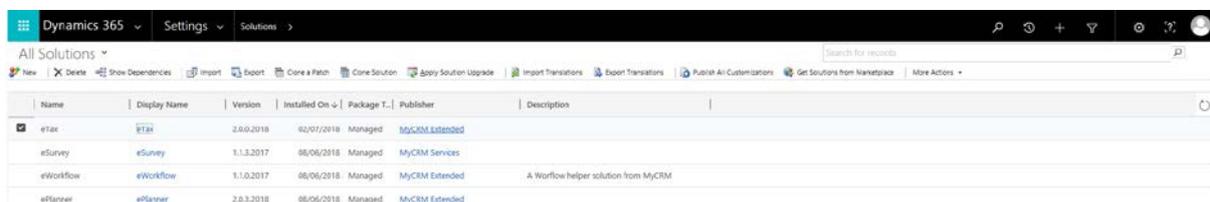
Setup your defined tax rates under settings, an extension entity called Tax rate exists for you to have one or more tax rates.

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.

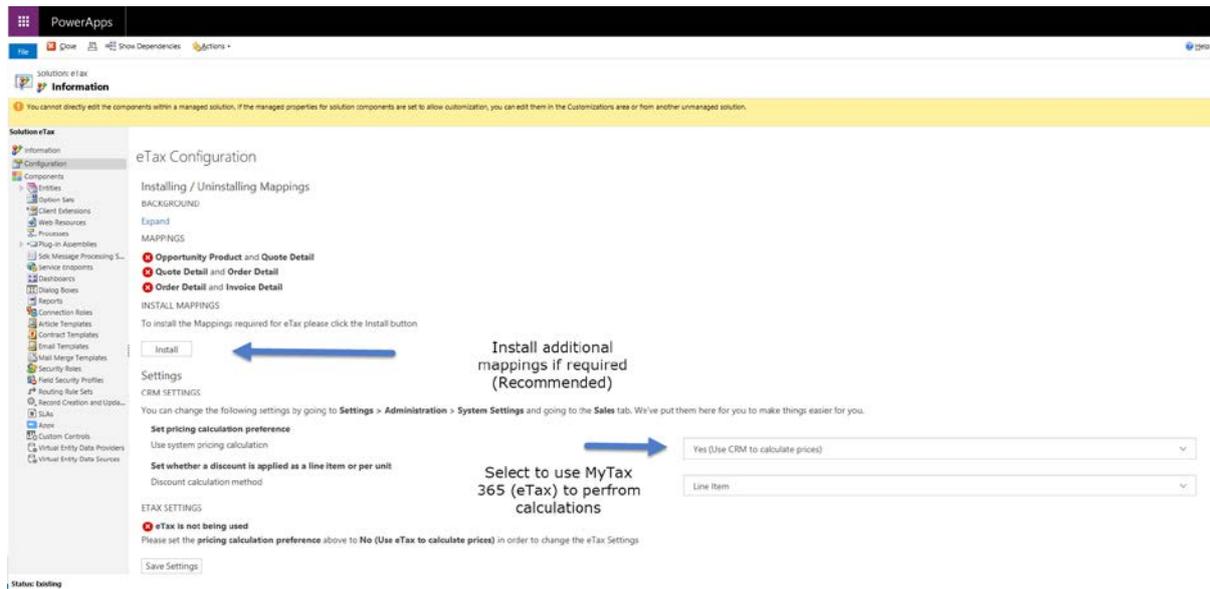
Setting up global configuration settings

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



Name	Display Name	Version	Installed On	Package T.	Publisher	Description
eTax	eTax	2.0.0.2018	02/07/2018	Managed	MyCRM Extended	
eSurvey	eSurvey	1.1.3.2017	08/06/2018	Managed	MyCRM Services	
eWorkflow	eWorkflow	1.1.0.2017	08/06/2018	Managed	MyCRM Extended	A Workflow helper solution from MyCRM
eScanner	eScanner	2.0.3.2018	08/06/2018	Managed	MyCRM Extended	

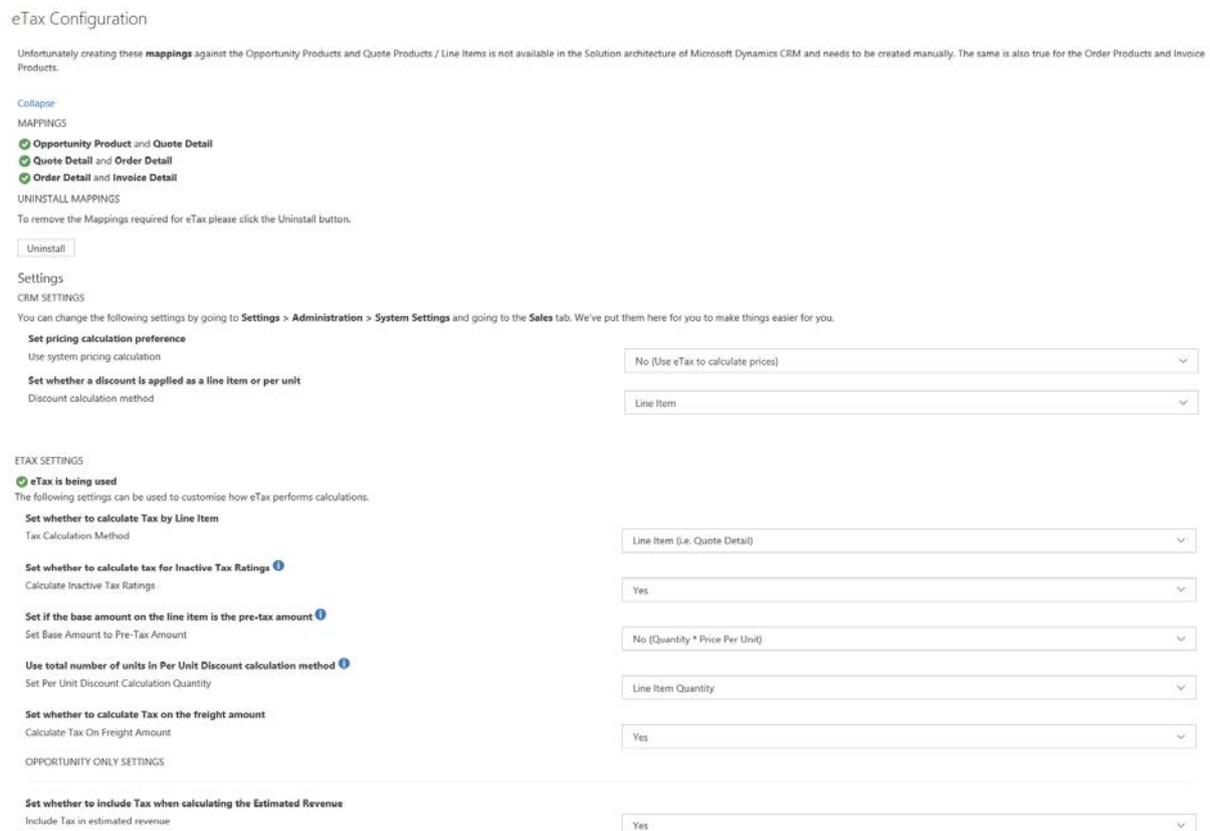
Select and open the solution for MyTax 365 (eTax) and navigate to the Configuration page at the top of the solution Window.



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:



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.

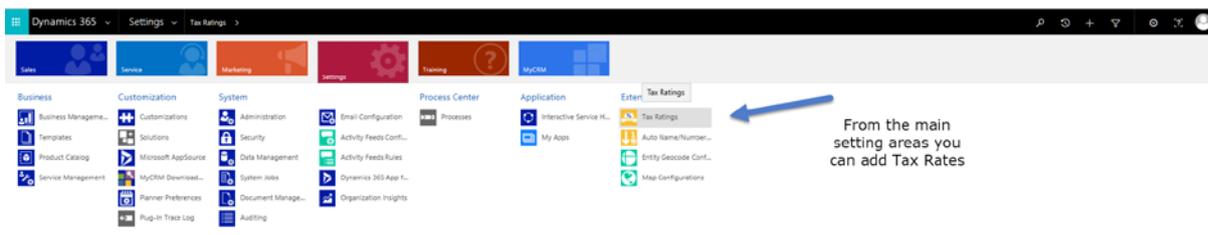
The tax on a record can be set to calculate at the top level or at the line item level. You will have the option to use just active tax rates or all. As an administrator you will have access to tax options and be able to set the “Base Amount Field” so that it is populated with or without the discount.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



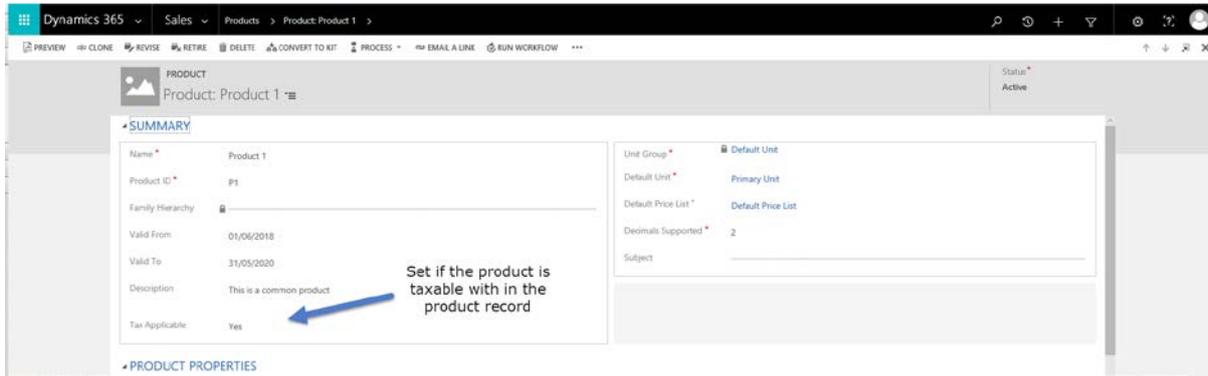
There is no limitation to the number of Tax rates that can be created, however, we recommend that you do not have duplicated values.

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:

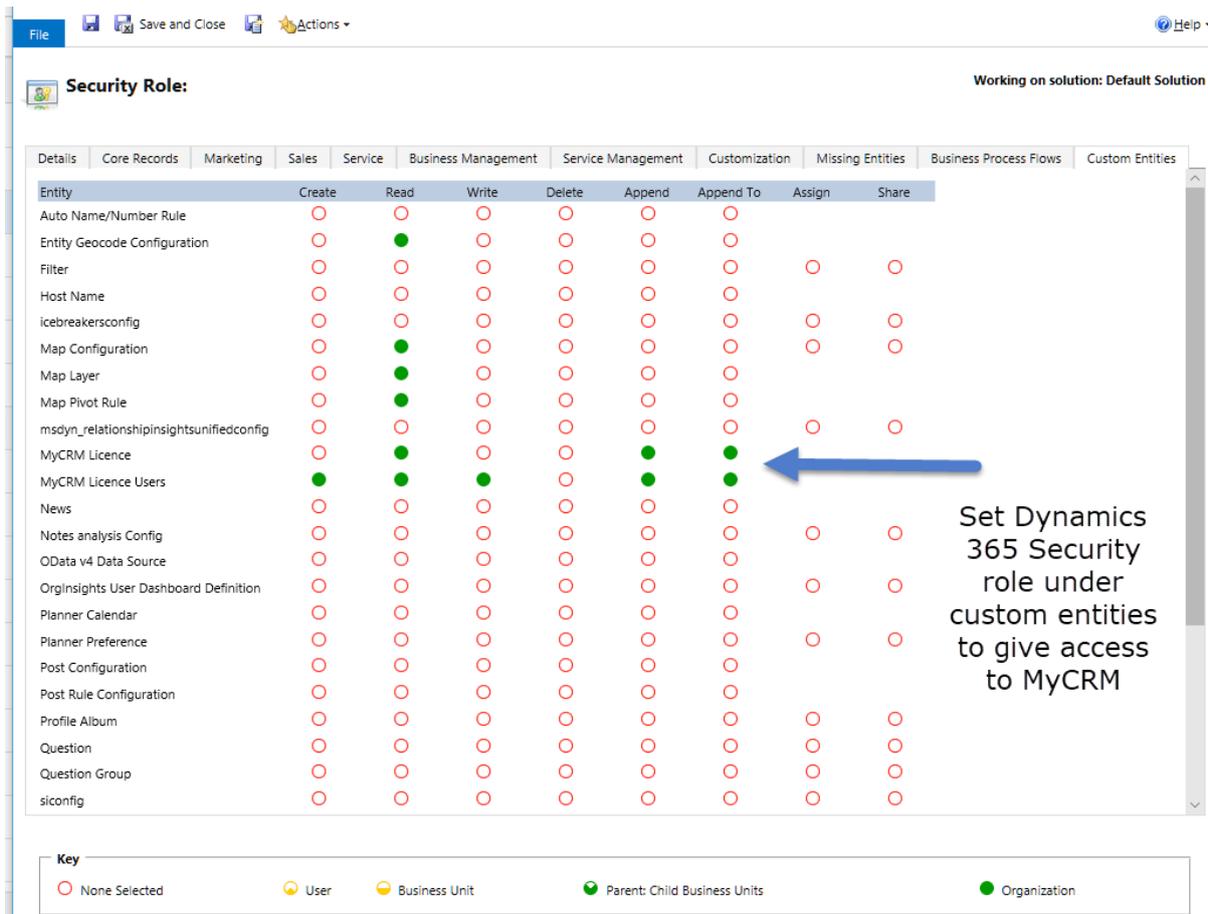




Update and save the record, from this point forward the tax will be calculated on this product and no further action is required.

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.



For Additional Information

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