Created by MyCRM Ltd

# MyTax Calculations

**User Guide**

REF – MyTax.User.Guide.pdf

MyCRM Ltd
6/4/2018

## About This Guide

The purpose of this guide is to give a high-level overview of how to make use of the extended functionality from the MyCRM MyTax 365 calculations solution, enabling your organisation to auto calculate Sales Tax in Dynamics 365.
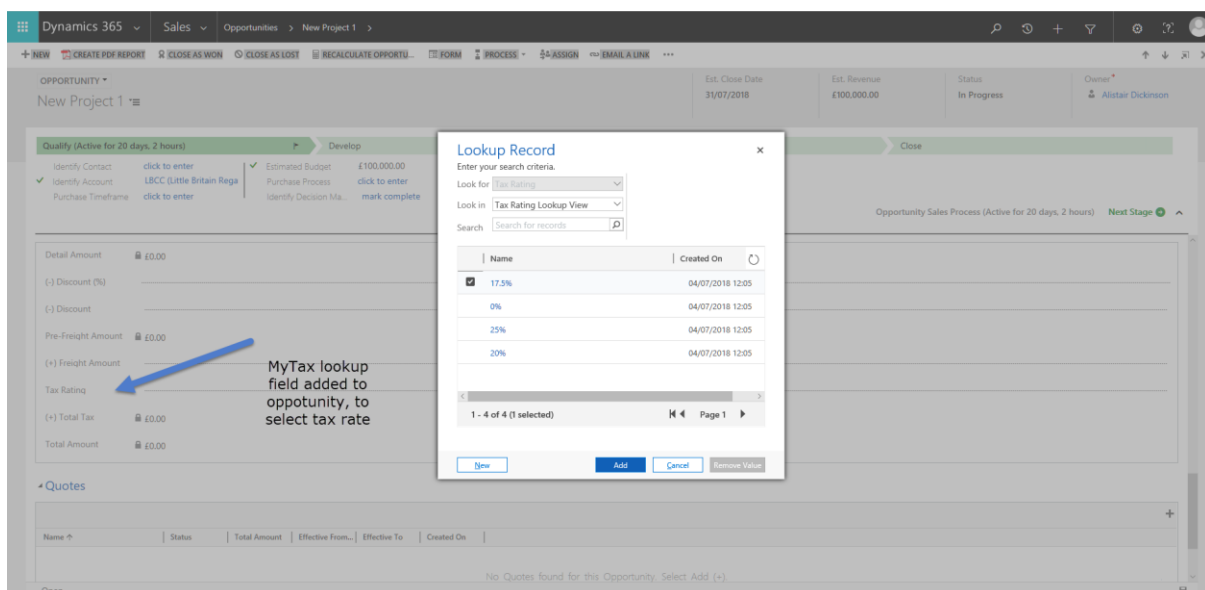
## Installation

Please refer to the separate MyTax 365 Installation and Configuration guide for instructions. This guide assumes that MyTax has been installed and the setup of the configuration has been completed

## Working with MyTax

MyCRM MyTax 365 is a downloadable solution for Microsoft Dynamics 365, MyTax extends the way Opportunity, Quote, Order and Invoice records calculate sales tax or VAT and allows an end user to select a tax rate for the particular record as it is being created.

As part of the 365 release MyTax has been extended and made more configurable, but in this user guide we cover the day to day use, using an opportunity record in Dynamics 365.



On selecting a tax rating at this level and based on the configurations for MyTax 365 that have been set, the tax will automatically calculate on the opportunity or related record.

You can see that on the product lines that have been added to the opportunity, the tax is calculated based on the tax rate selected.
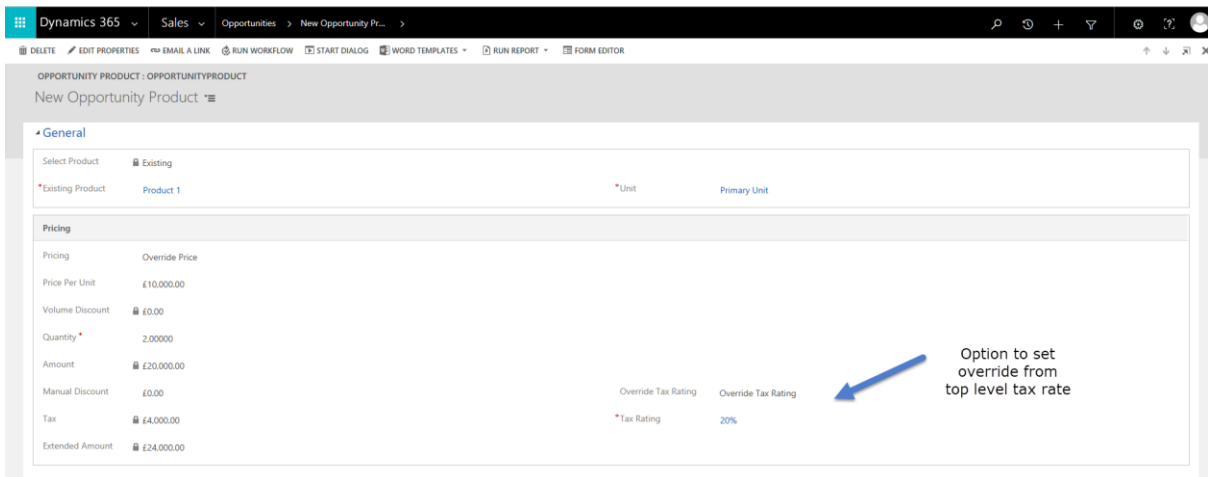


The tax rate can be selected on the main form, using a standard CRM lookup, an extension entity under setting is available to create tax rates.

Should you need to change the tax rating on the individual line items this is possible by opening the individual line items and selecting the override tax option.
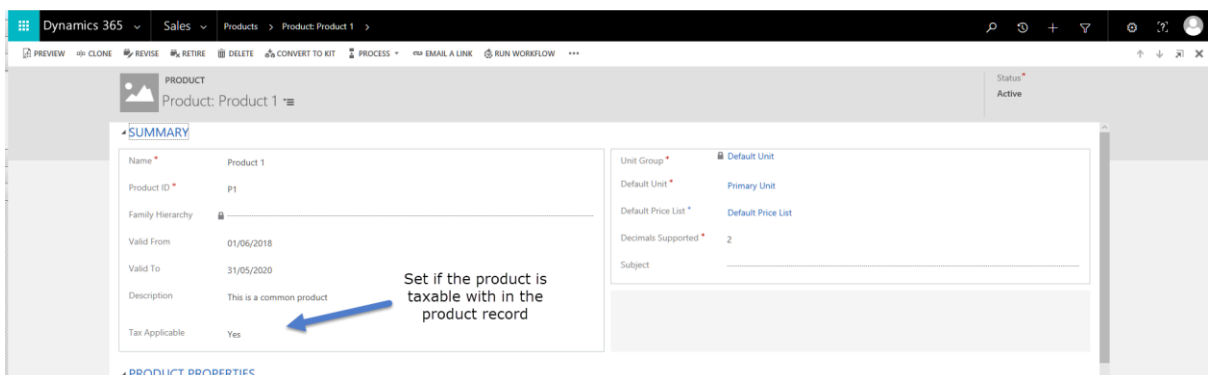


MyTax 365 also includes the flexibility to set products as a taxable, the calculation of tax will only be performed if the product is configured with Tax Applicable = yes.  If installing MyTax 365 into an existing environment, products will need to be configured accordingly.

For Additional Information

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