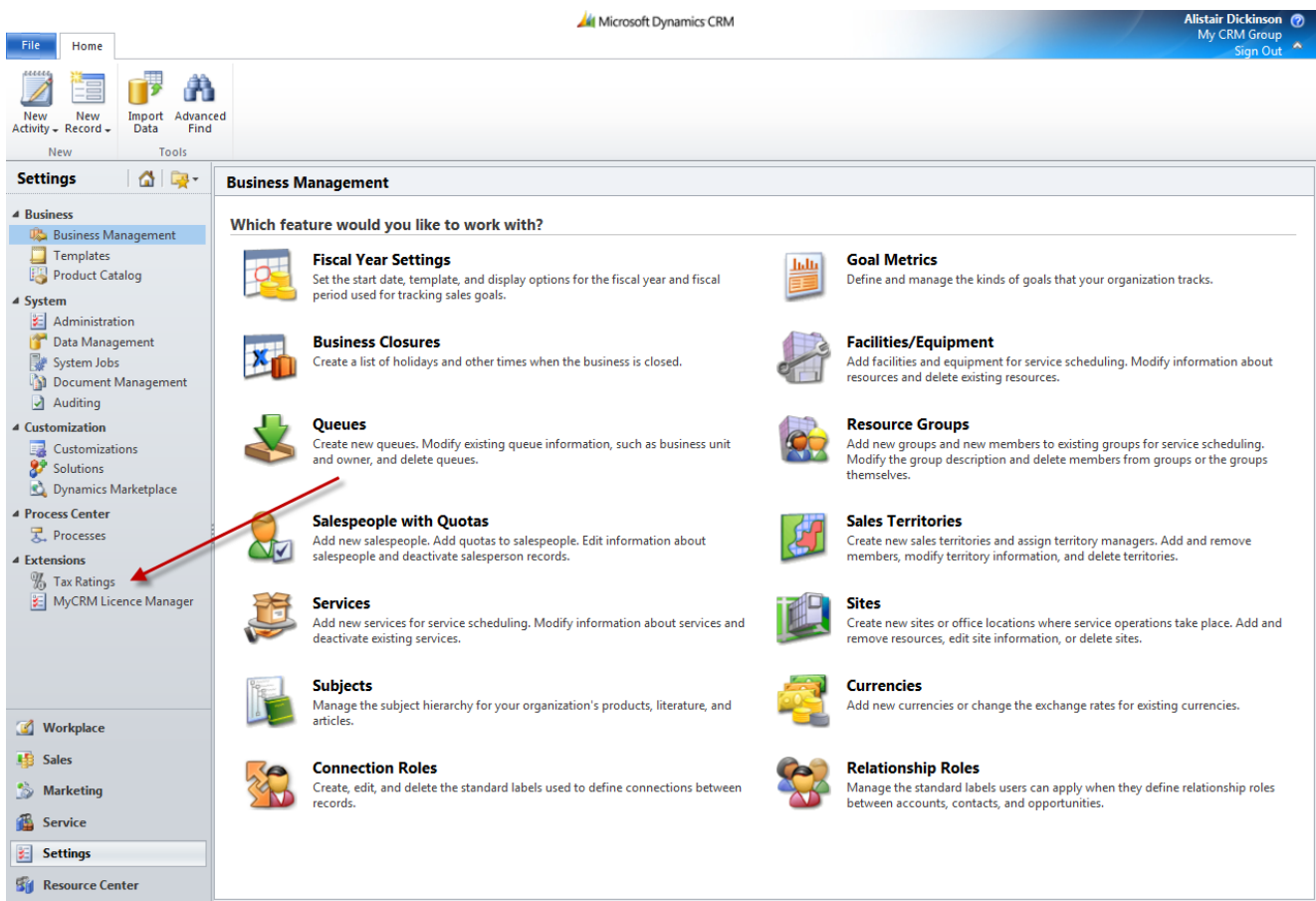


eTax 2011

Setting Up and Using eTax

After the eTax solution for Microsoft CRM has been installed all components will have automatically been published to the CRM solution. Under the setting area a new entity has been created called Tax Ratings. Select the Tax ratings and enter related Tax rates to use in the CRM system.

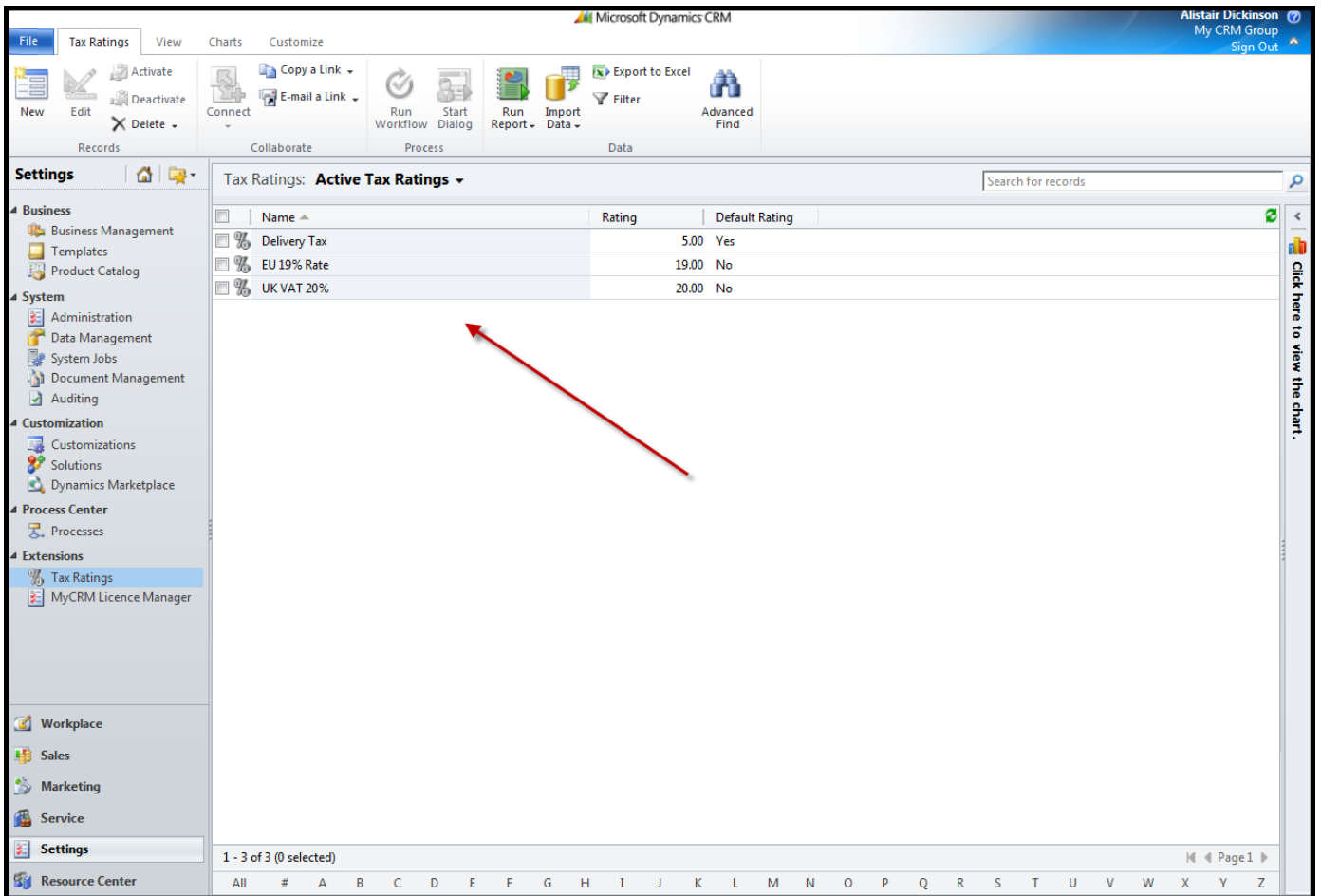


For Additional Information

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eTax 2011

Once you tax ratings have been created you will need to set your products in CRM to have a Tax rate



The screenshot shows the Microsoft Dynamics CRM interface for 'Tax Ratings'. The left-hand navigation pane is expanded to 'Settings' > 'Extensions' > 'Tax Ratings'. The main window displays a table of 'Active Tax Ratings' with the following data:

Name	Rating	Default Rating
Delivery Tax	5.00	Yes
EU 19% Rate	19.00	No
UK VAT 20%	20.00	No

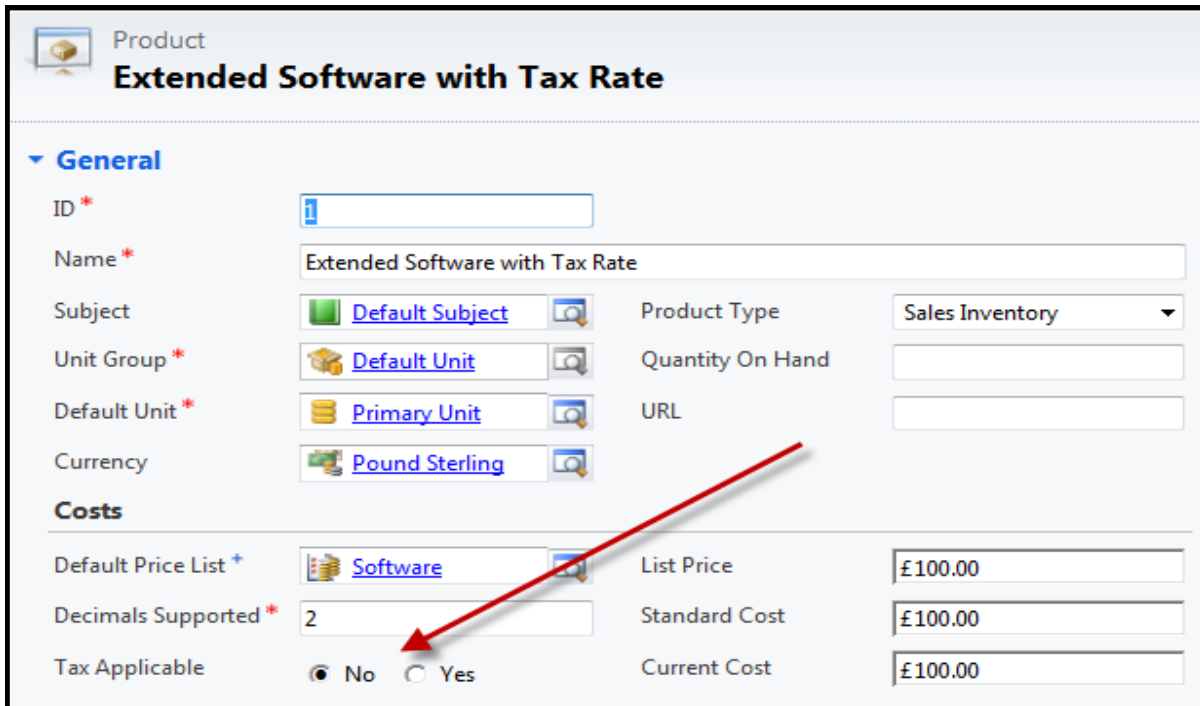
A red arrow points to the 'EU 19% Rate' row. The interface includes a ribbon with 'File', 'View', 'Charts', and 'Customize' tabs, and a search bar for records. The status bar at the bottom indicates '1 - 3 of 3 (0 selected)' and 'Page 1'.

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eTax 2011

On the product screen a new attribute has been created to enable a tax rate to apply to the product



Product
Extended Software with Tax Rate

General

ID *

Name *

Subject Product Type

Unit Group * Quantity On Hand

Default Unit * URL

Currency

Costs

Default Price List * List Price

Decimals Supported * Standard Cost

Tax Applicable No Yes Current Cost

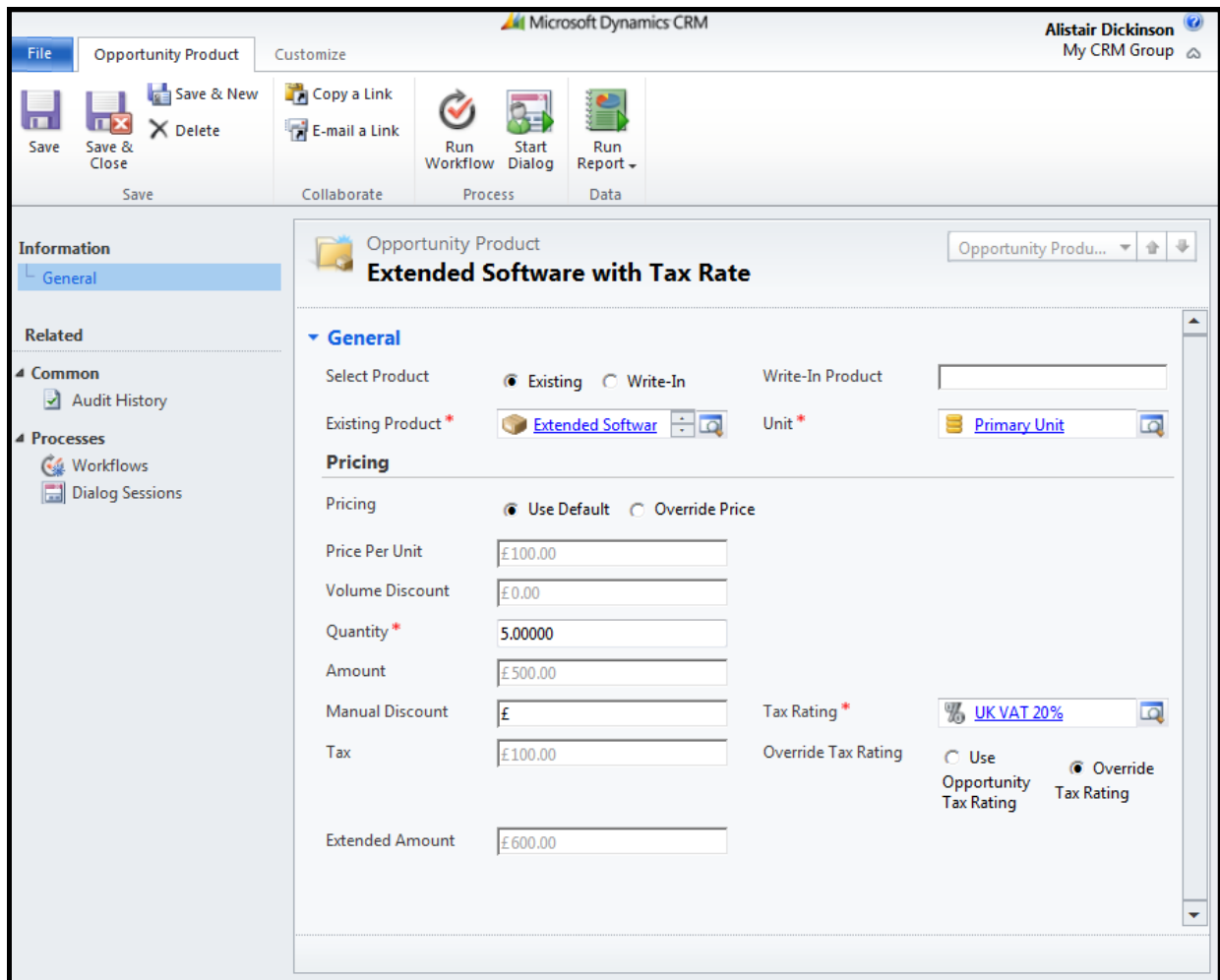
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eTax 2011

You can now use a tax rate against Opportunity, Quote, Order and Invoice in the screen shots below we use Opportunity to add a Tax Rate

From an Opportunity add a new product line item



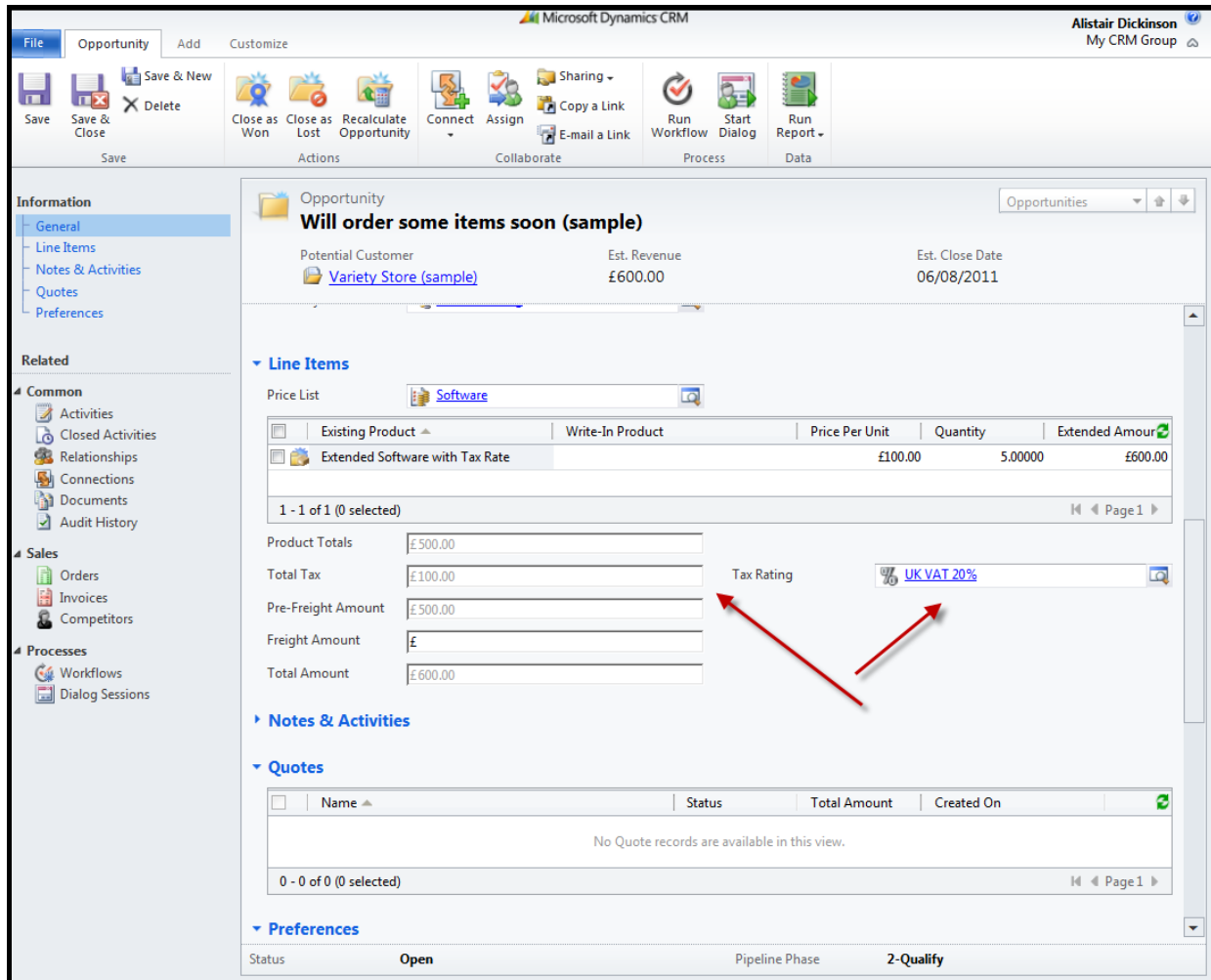
Notice that the Tax rate is applied to the line item as well and can either use the Tax rate from the opportunity or have its own independent tax rate.

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eTax 2011

From the opportunity screen now select to recalculate the value after adding product lines and you will see the Tax is automatically calculated for you



The screenshot shows the Microsoft Dynamics CRM interface for an Opportunity. The main area displays the following information:

- Opportunity:** Will order some items soon (sample)
- Potential Customer:** Variety Store (sample)
- Est. Revenue:** £600.00
- Est. Close Date:** 06/08/2011

The **Line Items** section shows a table with the following data:

Existing Product	Write-In Product	Price Per Unit	Quantity	Extended Amount
Extended Software with Tax Rate		£100.00	5.00000	£600.00

Below the table, the **Product Totals** are displayed:

Product Totals	£500.00
Total Tax	£100.00
Pre-Freight Amount	£500.00
Freight Amount	£
Total Amount	£600.00

The **Tax Rating** is set to **UK VAT 20%**. Two red arrows point from the 'Total Tax' and 'Total Amount' rows of the Product Totals table to the Tax Rating dropdown menu.

The **Quotes** section shows no records are available in this view.

The **Preferences** section shows the Status is **Open** and the Pipeline Phase is **2-Qualify**.

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