

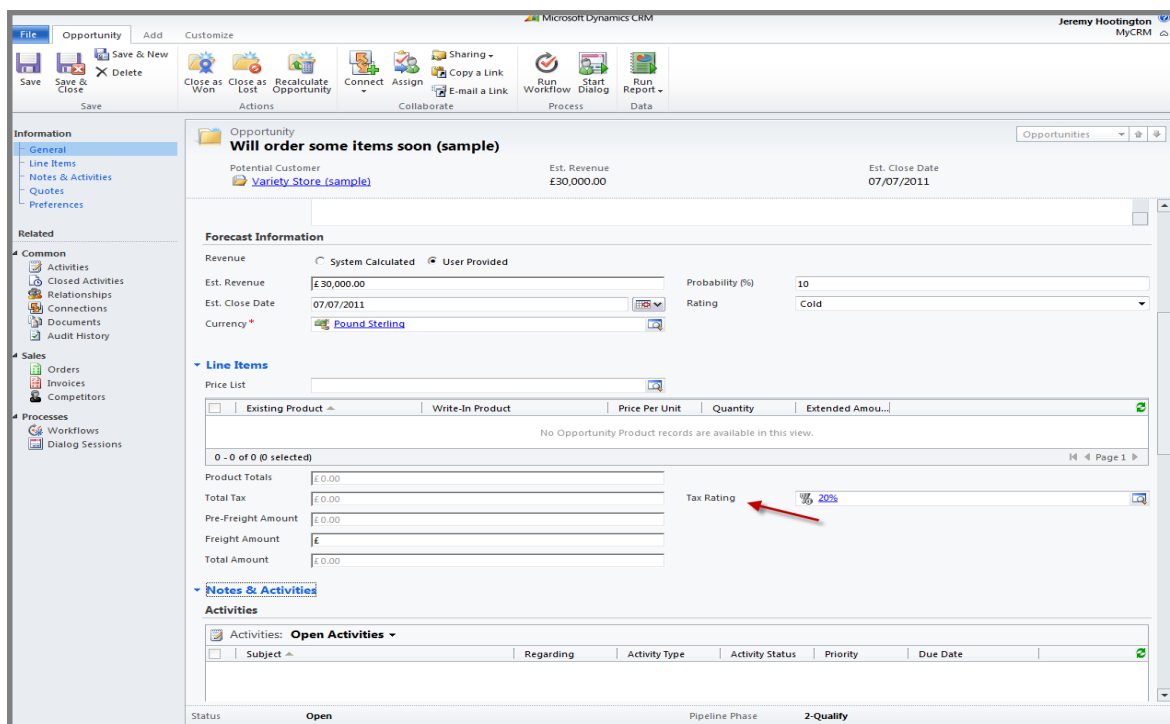
# eTax 2011

## eTax 2011

The MyCRM eTax 2011 solution is an add-on for Microsoft CRM 2011 On-Premise, MyCRM Partner Hosted and Microsoft CRM Online

eTax is an extension to the way Opportunity, Quote, Order and Invoice records calculate sales tax or VAT and allows an end user to select a VAT or Tax Rate for the particular Opportunity, Quote, Order or Invoice record as it is being created.

The only change to the Opportunity, Quote, Order or Invoice screen is the addition of a look up field for the appropriate VAT or Tax Rate.



When the VAT or Tax Rate is selected the value of products on the related line items will use the tax rating and update the sales tax element of the record by the rate specified. At each product line the default parent tax rating can also be over ridden.

A further advantage is that the related product line items for Opportunity, Quote, Order and Invoice also have an override feature to allow the product line item to have no tax or a independent VAT or Tax Rating.

For Additional Information

Contact : [Alistair Dickinson](#)

Email : [sales@mycrmgroup.com](mailto:sales@mycrmgroup.com)

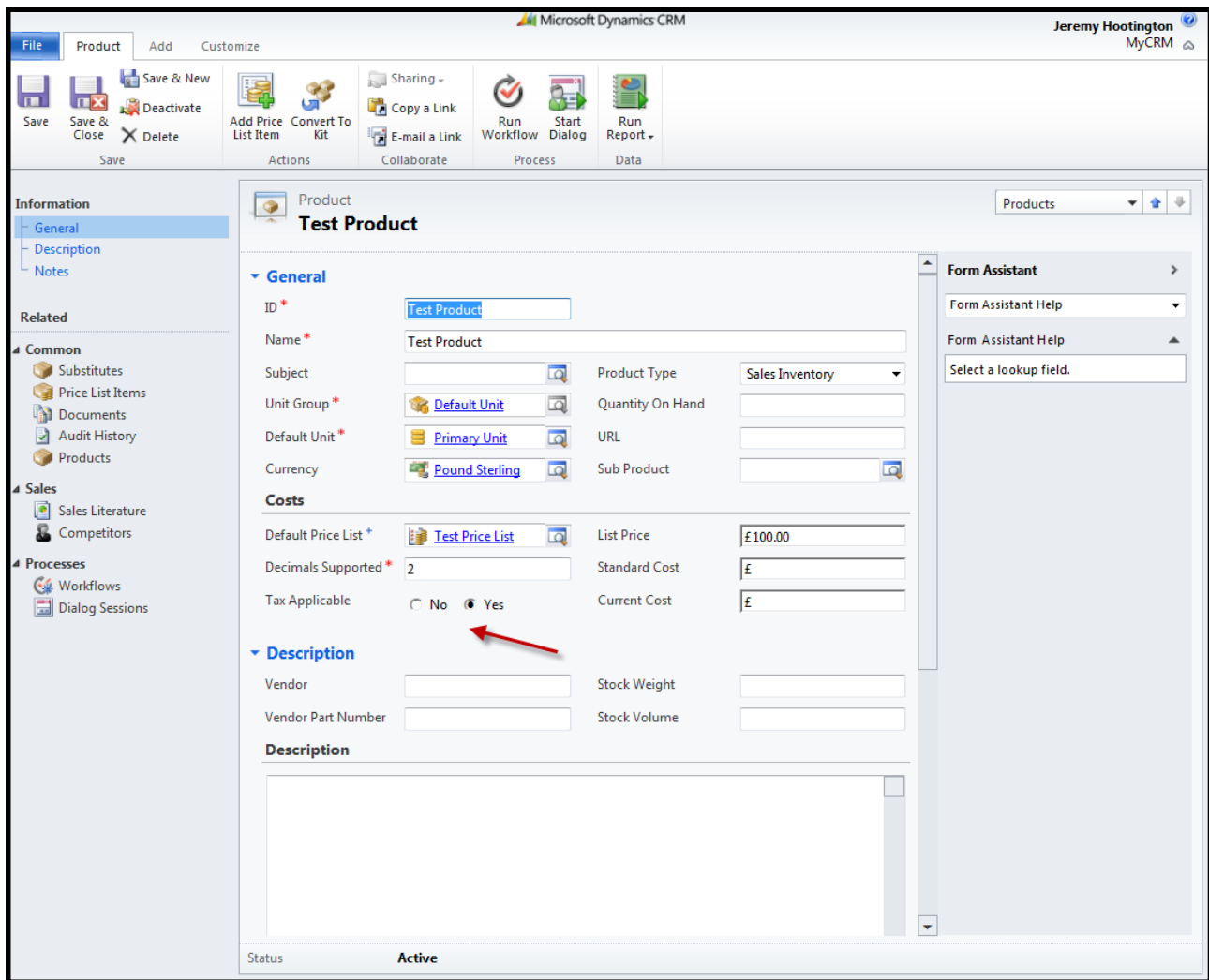
Phone : [01983 245245](tel:01983 245245)

Web : [www.mycrmgroup.com](http://www.mycrmgroup.com)

# eTax 2011

## Taxable Products

A new feature of eTax 2011 includes the ability to make products taxable meaning that some products will remain tax free even if a default VAT or tax rate is set



The screenshot shows the Microsoft Dynamics CRM interface for a Product record named 'Test Product'. The 'General' tab is active, and the 'Tax Applicable' field is set to 'Yes', indicated by a red arrow. The 'Costs' section shows a list price of £100.00 and a standard cost of £. The 'Description' section is currently empty.

General	
ID *	Test Product
Name *	Test Product
Subject	
Unit Group *	Default Unit
Default Unit *	Primary Unit
Currency	Pound Sterling
Product Type	Sales Inventory
Quantity On Hand	
URL	
Sub Product	
Costs	
Default Price List *	Test Price List
List Price	£100.00
Decimals Supported *	2
Standard Cost	£
Tax Applicable	<input type="radio"/> No <input checked="" type="radio"/> Yes
Current Cost	£
Description	
Vendor	
Stock Weight	
Vendor Part Number	
Stock Volume	
Description	

For Additional Information

Contact : [Alistair Dickinson](#)  
 Email : [sales@mycrmgroup.com](mailto:sales@mycrmgroup.com)  
 Phone : [01983 245245](tel:01983 245245)  
 Web : [www.mycrmgroup.com](http://www.mycrmgroup.com)

# eTax 2011

## Discounts and Freight Values

Within Microsoft Dynamics CRM at the Opportunity, Quote, Order and Invoice stage a feature is included at the top level record to allow for discounts and the addition of a freight cost.

Any VAT or Tax Rate that is applied at the product line level will not be recalculated at the top level when using the discounts or adding a freight cost as this is standard CRM functionality and we would recommend that all discounts are applied at the product line level and would advise that should a delivery charge be required that an additional product line is added to the Opportunity, Quote, Order or Invoice record as such with no tax applied to the product line.

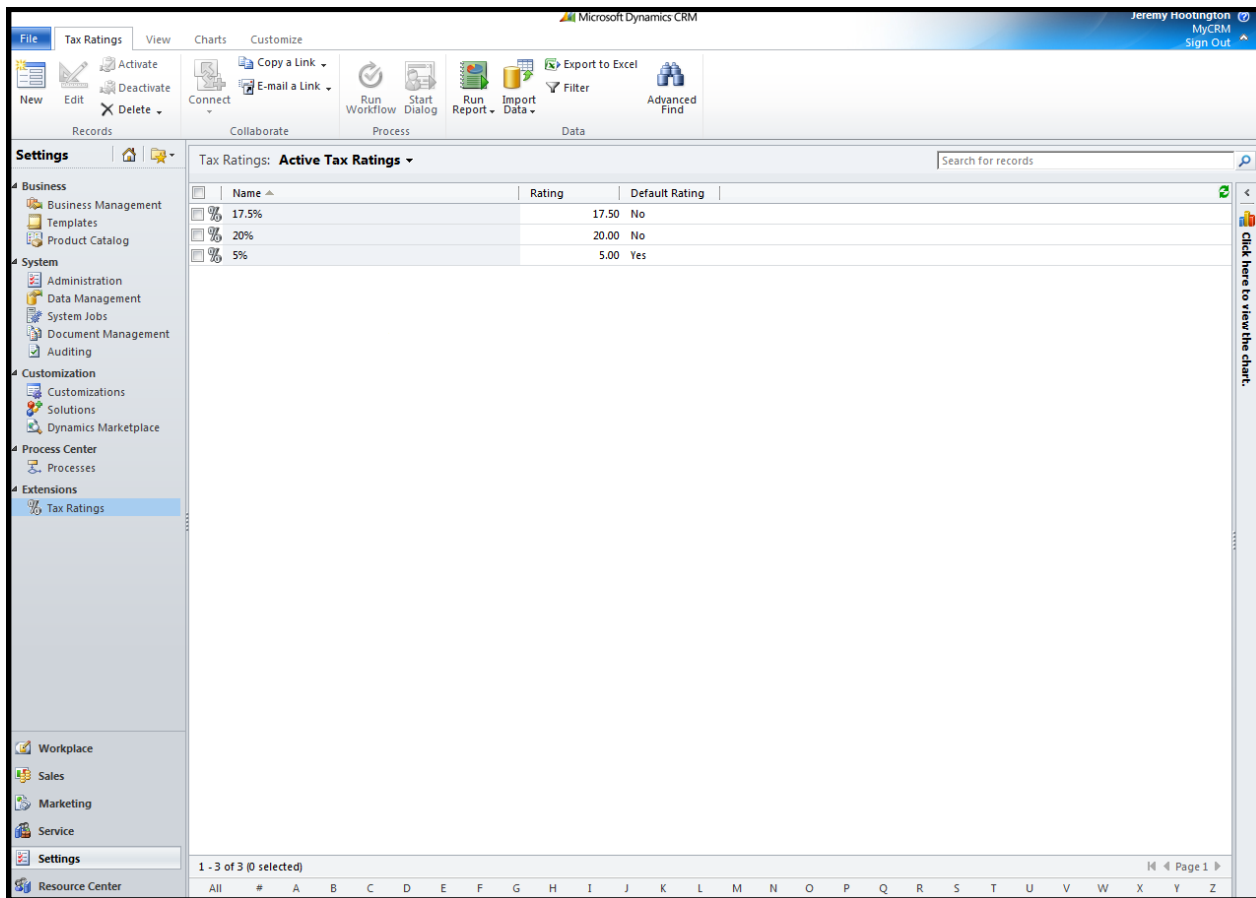
For Additional Information

Contact : [Alistair Dickinson](#)  
Email : [sales@mycrmgroup.com](mailto:sales@mycrmgroup.com)  
Phone : [01983 245245](tel:01983 245245)  
Web : [www.mycrmgroup.com](http://www.mycrmgroup.com)

# eTax 2011

## Create VAT and Tax Rates

As part of the eTax 2011 functionality a new entity setting area has been created under administration which is used to record and create the different VAT and Tax Rates that can be applied within the CRM system.



New VAT or Tax Rates are easy to create in CRM and once created can be used for calculations in the Opportunity, Quote, Order and Invoice record types.

For Additional Information

Contact : [Alistair Dickinson](#)  
 Email : [sales@mycrmgroup.com](mailto:sales@mycrmgroup.com)  
 Phone : [01983 245245](tel:01983 245245)  
 Web : [www.mycrmgroup.com](http://www.mycrmgroup.com)