

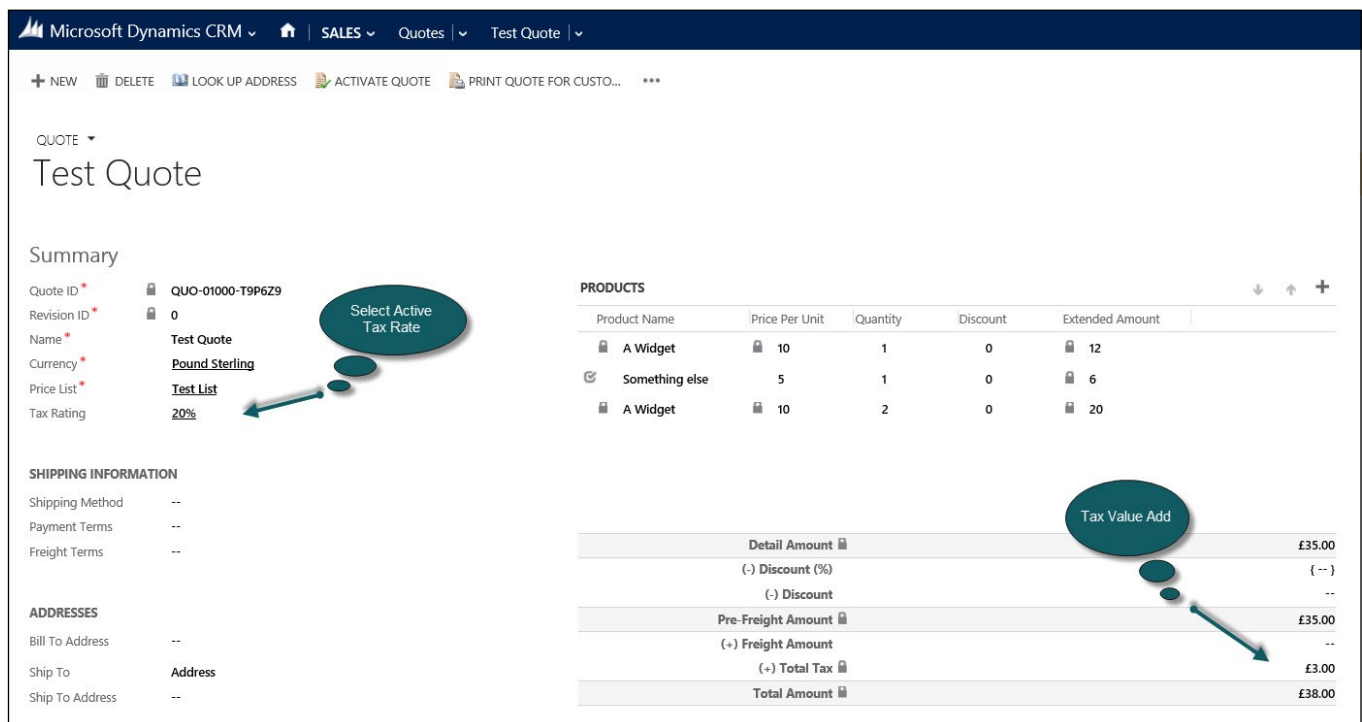
# eTax 2013

## eTax 2013

MyCRM eTax 2013 is a downloadable solution for Microsoft CRM 2013 On Premise, Partner Hosted and Microsoft CRM Online

eTax 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.

The only change to CRM 2013 form is an extra lookup field so the appropriate tax rate can be selected.



The screenshot shows the Microsoft Dynamics CRM interface for a 'Test Quote'. The 'Summary' section includes fields for Quote ID (QUO-01000-T9P6Z9), Revision ID (0), Name (Test Quote), Currency (Pound Sterling), Price List (Test List), and Tax Rating (20%). A callout bubble labeled 'Select Active Tax Rate' points to the Tax Rating field. The 'PRODUCTS' table lists items: 'A Widget' (Price Per Unit: 10, Quantity: 1, Extended Amount: 12), 'Something else' (Price Per Unit: 5, Quantity: 1, Extended Amount: 6), and 'A Widget' (Price Per Unit: 10, Quantity: 2, Extended Amount: 20). The 'SHIPPING INFORMATION' and 'ADDRESSES' sections are partially visible. The 'DETAILS' section shows a summary table with 'Detail Amount' (£35.00), 'Pre-Freight Amount' (£35.00), and 'Total Amount' (£38.00). A callout bubble labeled 'Tax Value Add' points to the 'Total Amount' row.

Product Name	Price Per Unit	Quantity	Discount	Extended Amount
A Widget	10	1	0	12
Something else	5	1	0	6
A Widget	10	2	0	20

Detail Amount	£35.00
(-) Discount (%)	{ -- }
(-) Discount	--
Pre-Freight Amount	£35.00
(+) Freight Amount	--
(+) Total Tax	£3.00
Total Amount	£38.00

When the 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 applied.

Each product line can also have its own tax rate that will override the default tax rate on the record.

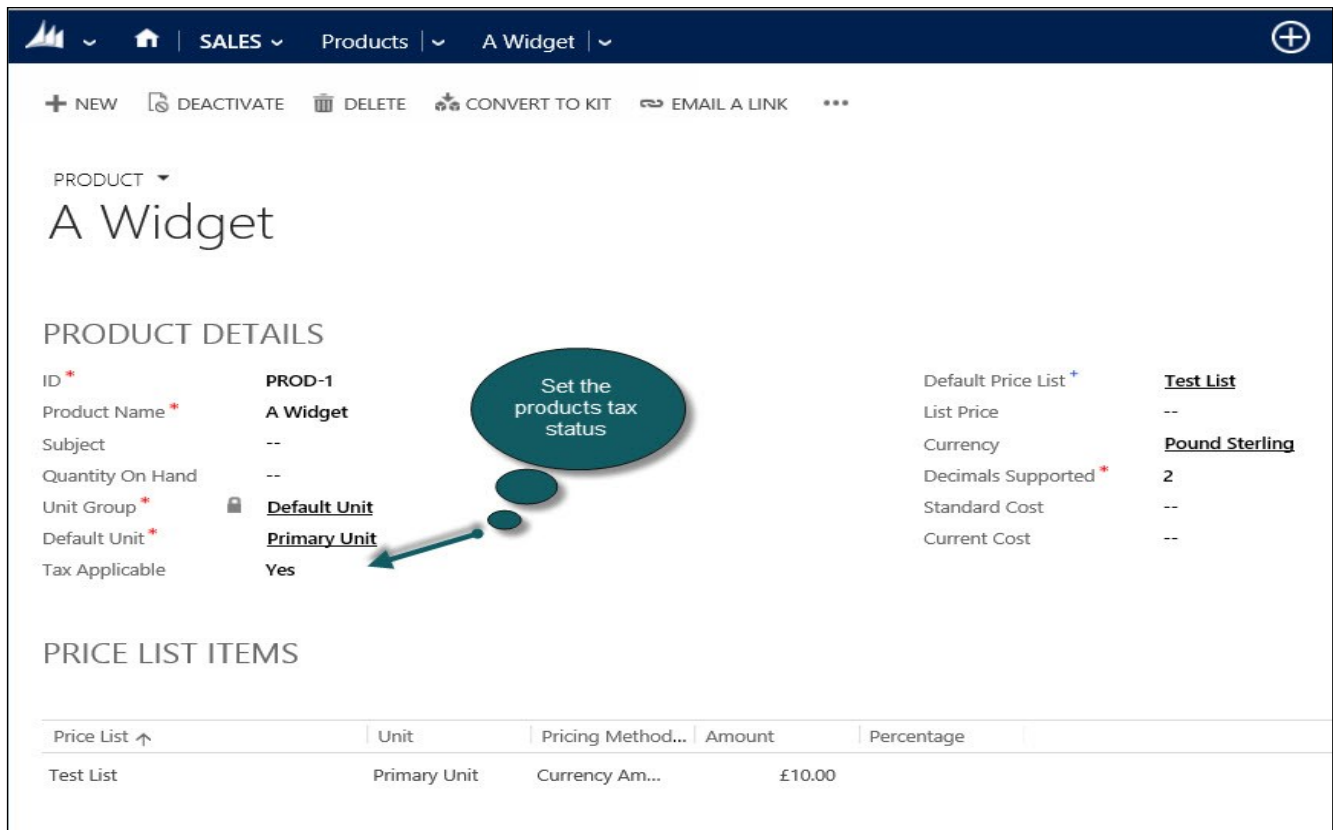
### For Additional Information

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## eTax 2013—Taxable Products

An additional feature of eTax 2013 includes the ability to make products taxable meaning that some products will remain tax free even if a default tax rate is set



The screenshot shows the 'PRODUCT DETAILS' section for 'A Widget'. The 'Default Unit' is set to 'Primary Unit'. A callout bubble points to this field with the text 'Set the products tax status'. The 'PRICE LIST ITEMS' table below shows a single entry for 'Test List' with a unit of 'Primary Unit' and an amount of '£10.00'.

Price List ↑	Unit	Pricing Method...	Amount	Percentage
Test List	Primary Unit	Currency Am...	£10.00	

## 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. This is standard CRM functionality and we would recommend that all discounts are applied at the product line level. We 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.

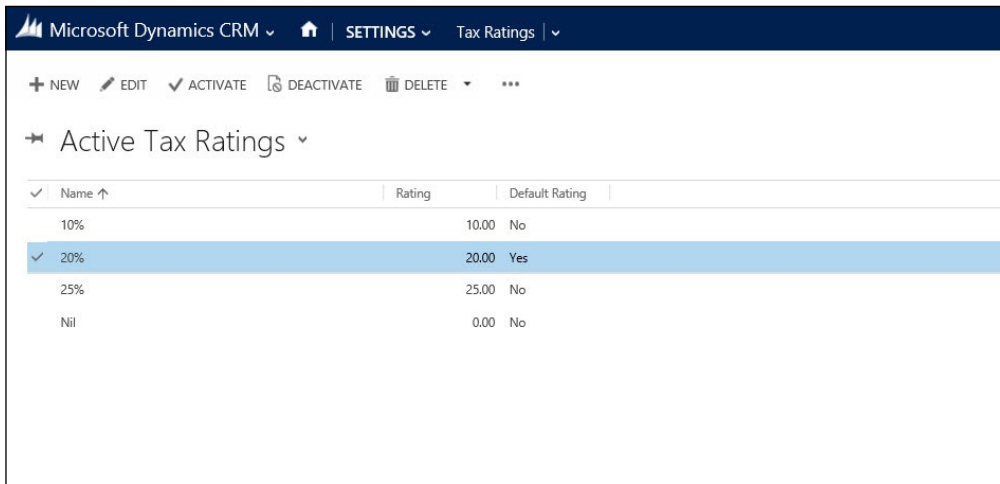
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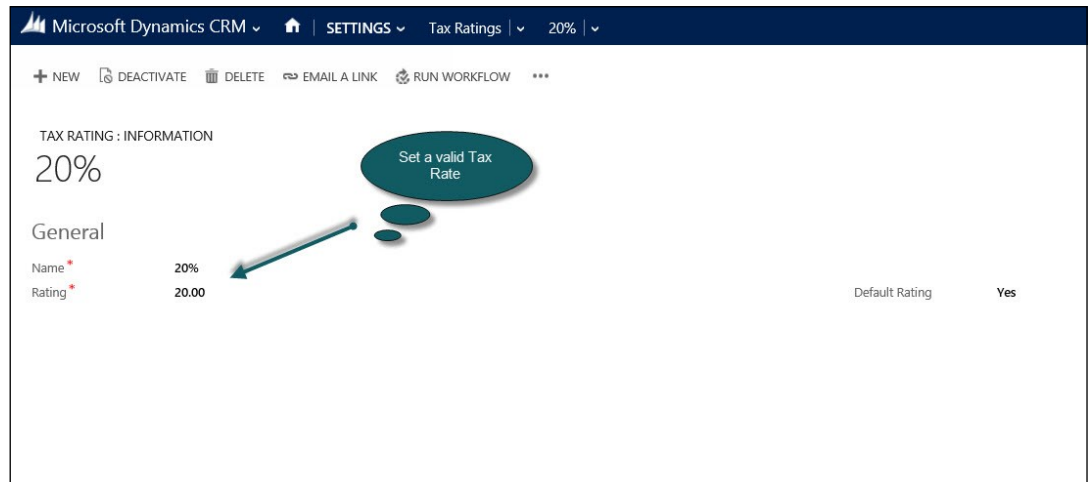
## eTax 2013—Creating “Tax Rates” is Easy

As part of the eTax 2013 functionality a new record type has been created in the setting area



Name	Rating	Default Rating
10%	10.00	No
20%	20.00	Yes
25%	25.00	No
Nil	0.00	No

Here you can create and edit tax rate’s to be used within the system. Just select +New and populate a new “Tax Rate to be used”



TAX RATING : INFORMATION

20%

General

Name \* 20%

Rating \* 20.00

Default Rating Yes

Set a valid Tax Rate

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