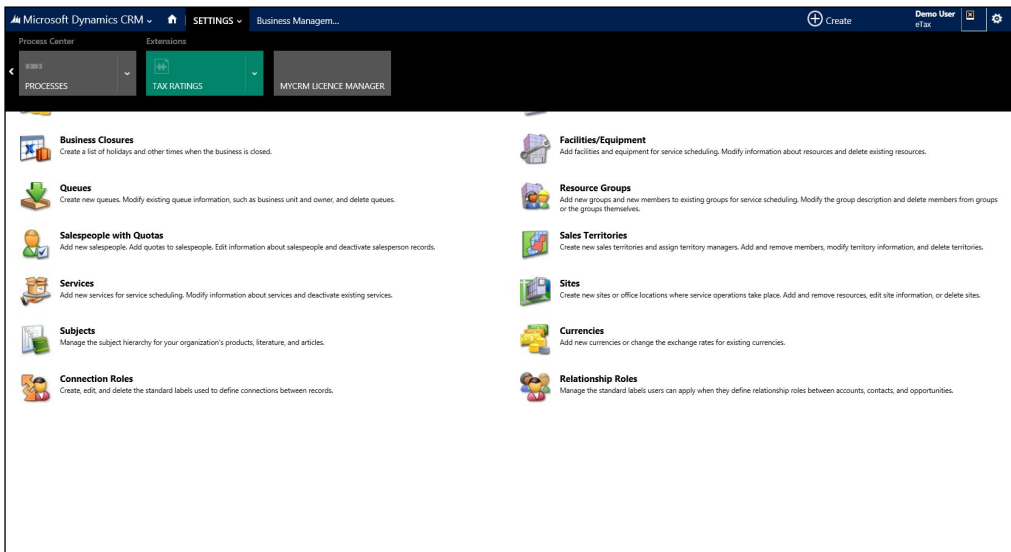
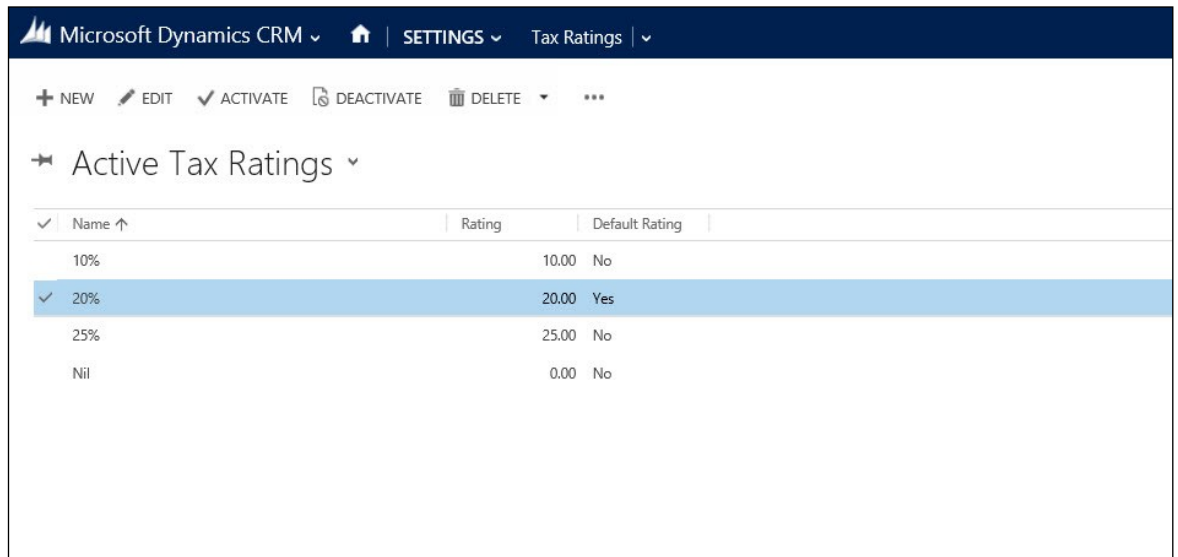


eTax 2013

Setting Up and Using eTax

Once the eTax solution for Microsoft CRM 2013 has been installed all components will have automatically been published to the CRM solution. Under the settings area a new record type called Tax Ratings will be made available

Select the "TAX RATINGS" section and enter related tax rates to use in the CRM system.

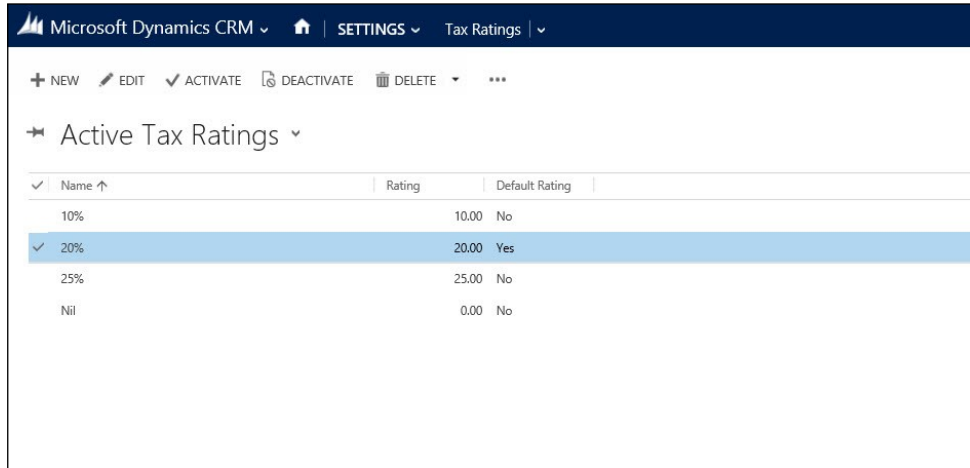
Name	Rating	Default Rating
10%	10.00	No
20%	20.00	Yes
25%	25.00	No
Nil	0.00	No

For Additional Information

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eTax 2013

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

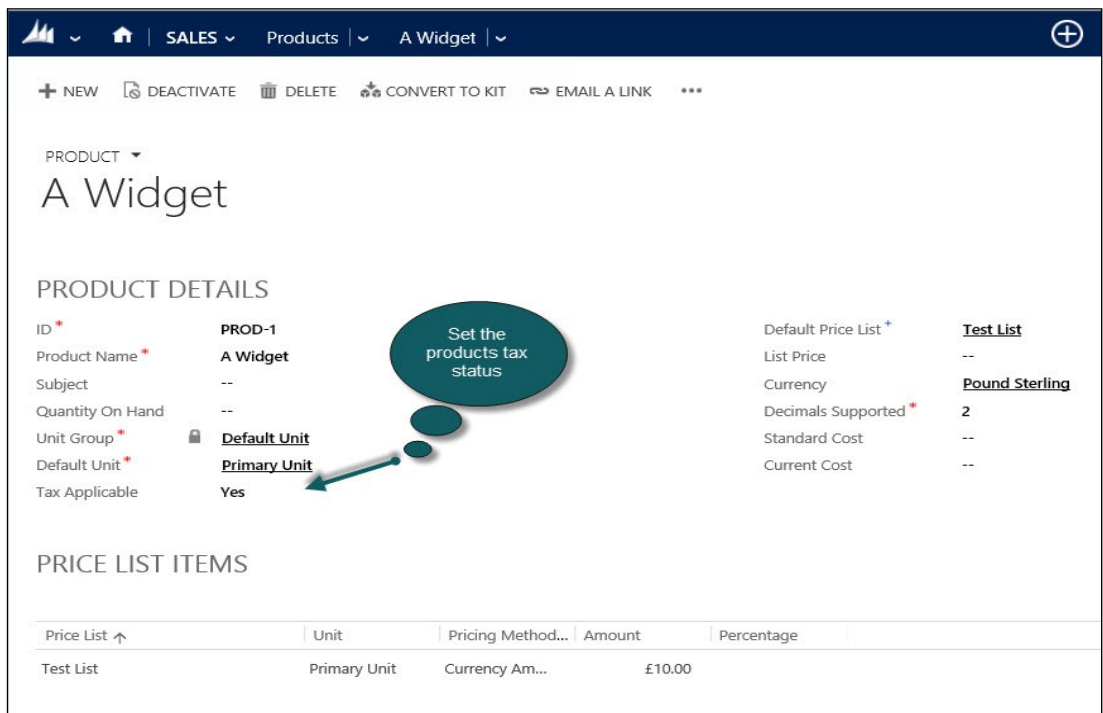


Microsoft Dynamics CRM | SETTINGS | Tax Ratings

Active Tax Ratings

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

On the product screen a new attribute or fields has been created, to enable a tax rate to apply to the product, set the “Tax Applicable” field on the product to “Yes or No”



SALES | Products | A Widget

PRODUCT: A Widget

PRODUCT DETAILS

ID*	PROD-1	Default Price List*	<u>Test List</u>
Product Name*	A Widget	List Price	--
Subject	--	Currency	<u>Pound Sterling</u>
Quantity On Hand	--	Decimals Supported*	2
Unit Group*	<u>Default Unit</u>	Standard Cost	--
Default Unit*	<u>Primary Unit</u>	Current Cost	--
Tax Applicable	Yes		

PRICE LIST ITEMS

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

Callout: Set the products tax status (pointing to Tax Applicable: Yes)

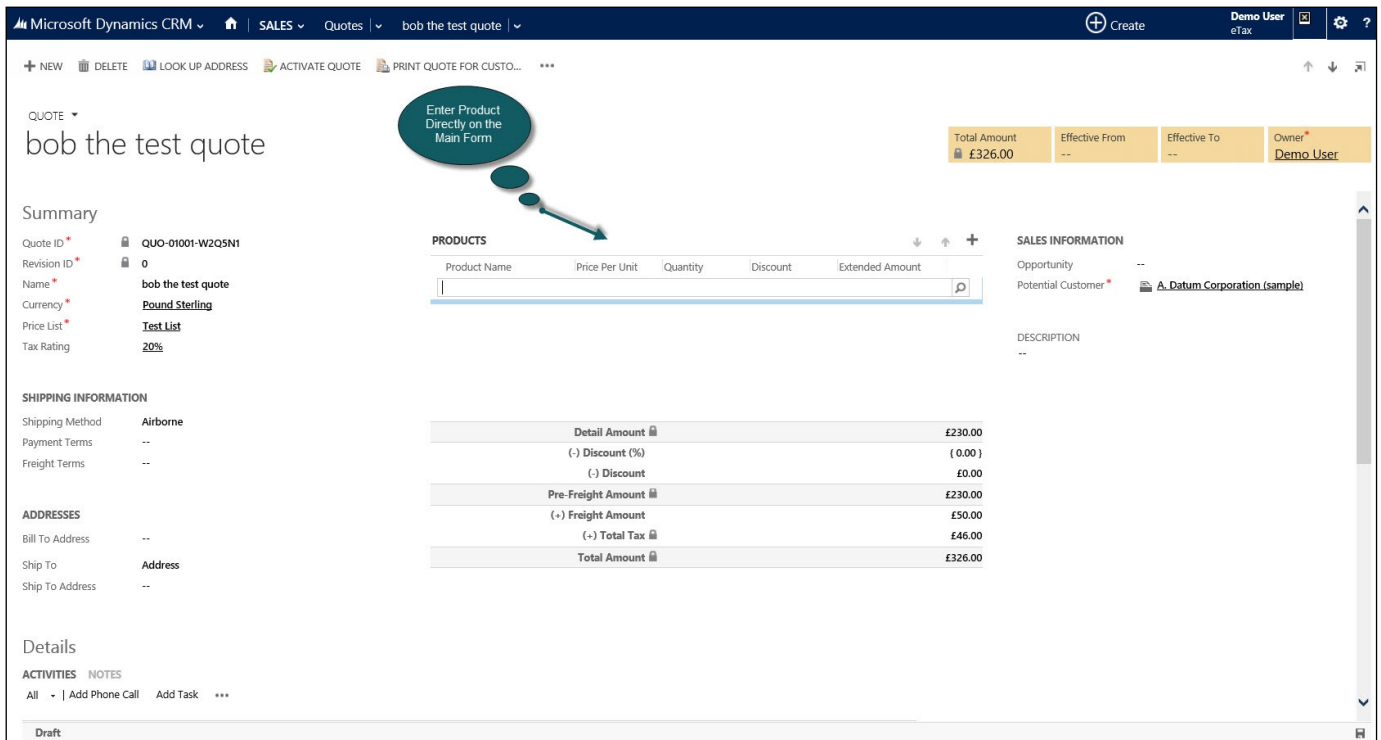
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eTax 2013

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

From a Quote add a new product.



The screenshot displays the Microsoft Dynamics CRM interface for a quote titled "bob the test quote". The interface includes a top navigation bar with "SALES" and "Quotes" menus. A callout bubble with the text "Enter Product Directly on the Main Form" points to the "PRODUCTS" table. The "Summary" section shows the quote ID "QUO-01001-W2Q5N1", name "bob the test quote", currency "Pound Sterling", price list "Test List", and tax rating "20%". The "SHIPPING INFORMATION" section shows "Airborne" shipping method. The "ADDRESSES" section shows "Bill To Address" and "Ship To Address". The "DETAILS" section shows "Draft" status. The "SALES INFORMATION" section shows "Potential Customer" as "A. Datum Corporation (sample)". The "PRODUCTS" table is empty. The "Summary" table shows a total amount of £326.00.

Product Name	Price Per Unit	Quantity	Discount	Extended Amount

Detail	Amount
Detail Amount	£230.00
(-) Discount (%)	{ 0.00 }
(-) Discount	£0.00
Pre-Freight Amount	£230.00
(+) Freight Amount	£50.00
(+) Total Tax	£46.00
Total Amount	£326.00

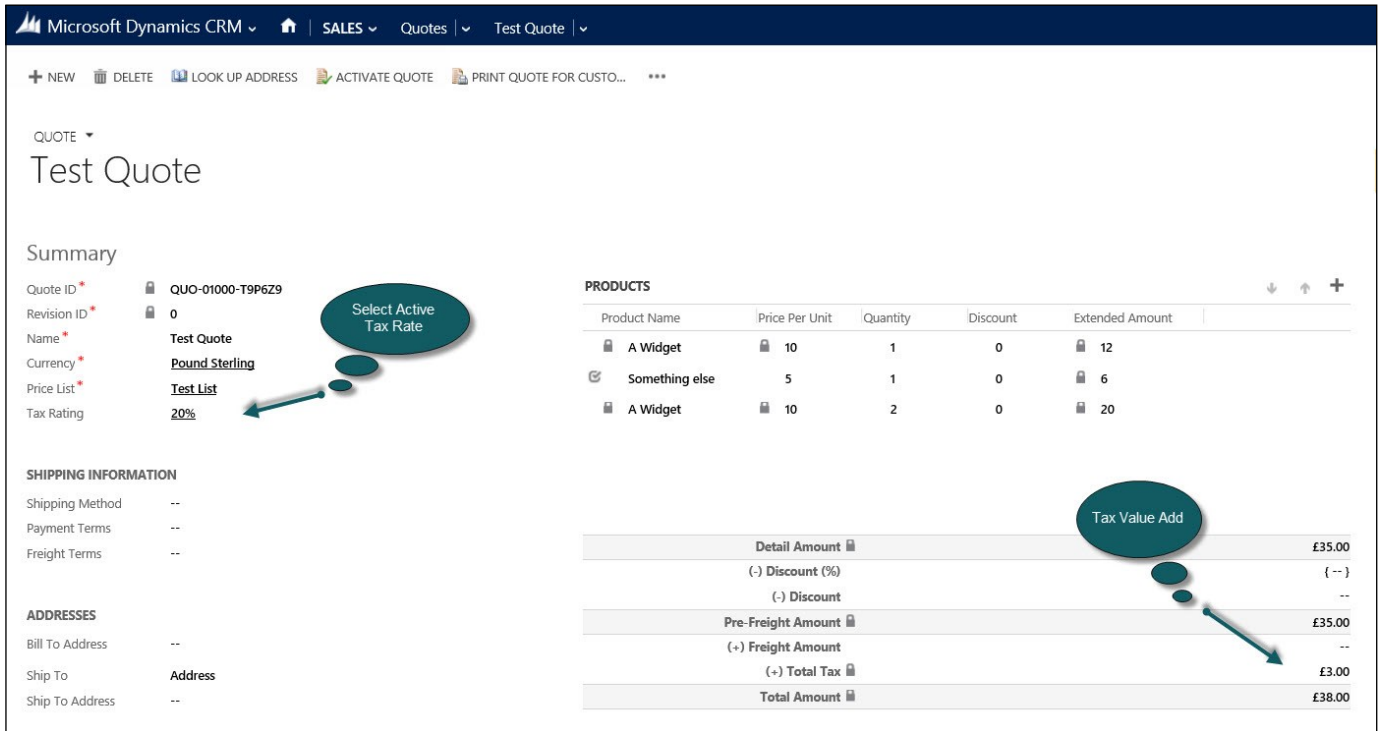
Notice that the Tax rate is applied to the line item as well and can either user the Tax rate from the opportunity of have its own independent tax rate.

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eTax 2013

From the quote screen now select to recalculate the value after adding product lines and you will see the tax is automatically calculated on the quote for the related product lines



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 another 'A Widget' (Price Per Unit: 10, Quantity: 2, Extended Amount: 20). The 'SHIPPING INFORMATION' and 'ADDRESSES' sections are partially visible. A summary table at the bottom right shows: Detail Amount (£35.00), (-) Discount (%), (-) Discount, Pre-Freight Amount (£35.00), (+) Freight Amount, (+) Total Tax (£3.00), and Total Amount (£38.00). A callout bubble labeled 'Tax Value Add' points to the Total Tax row.

By changing the values in the editable grids for the product lines the values on the main form also update.

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