

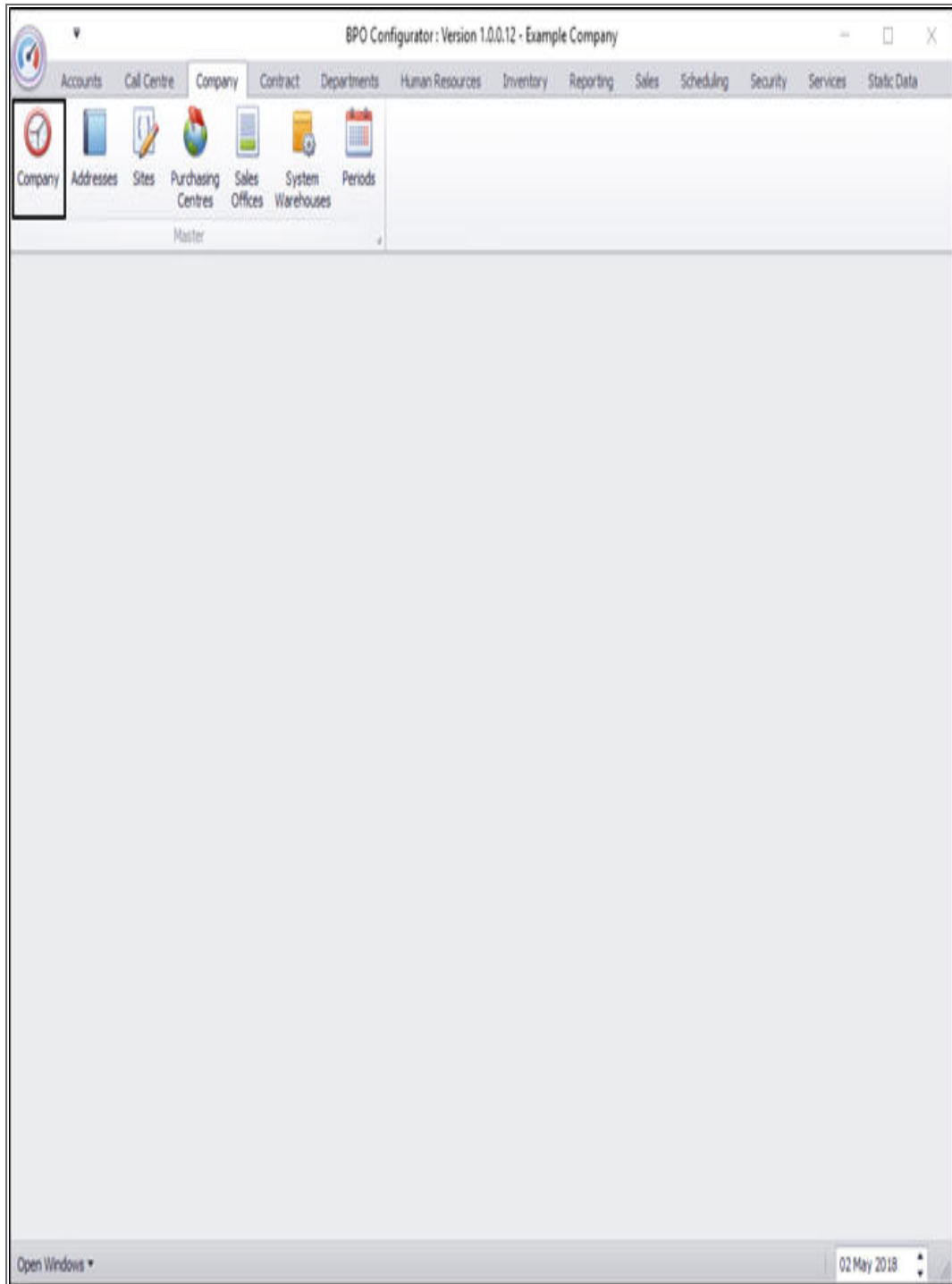
We are currently updating our site; thank you for your patience.

COMPANY

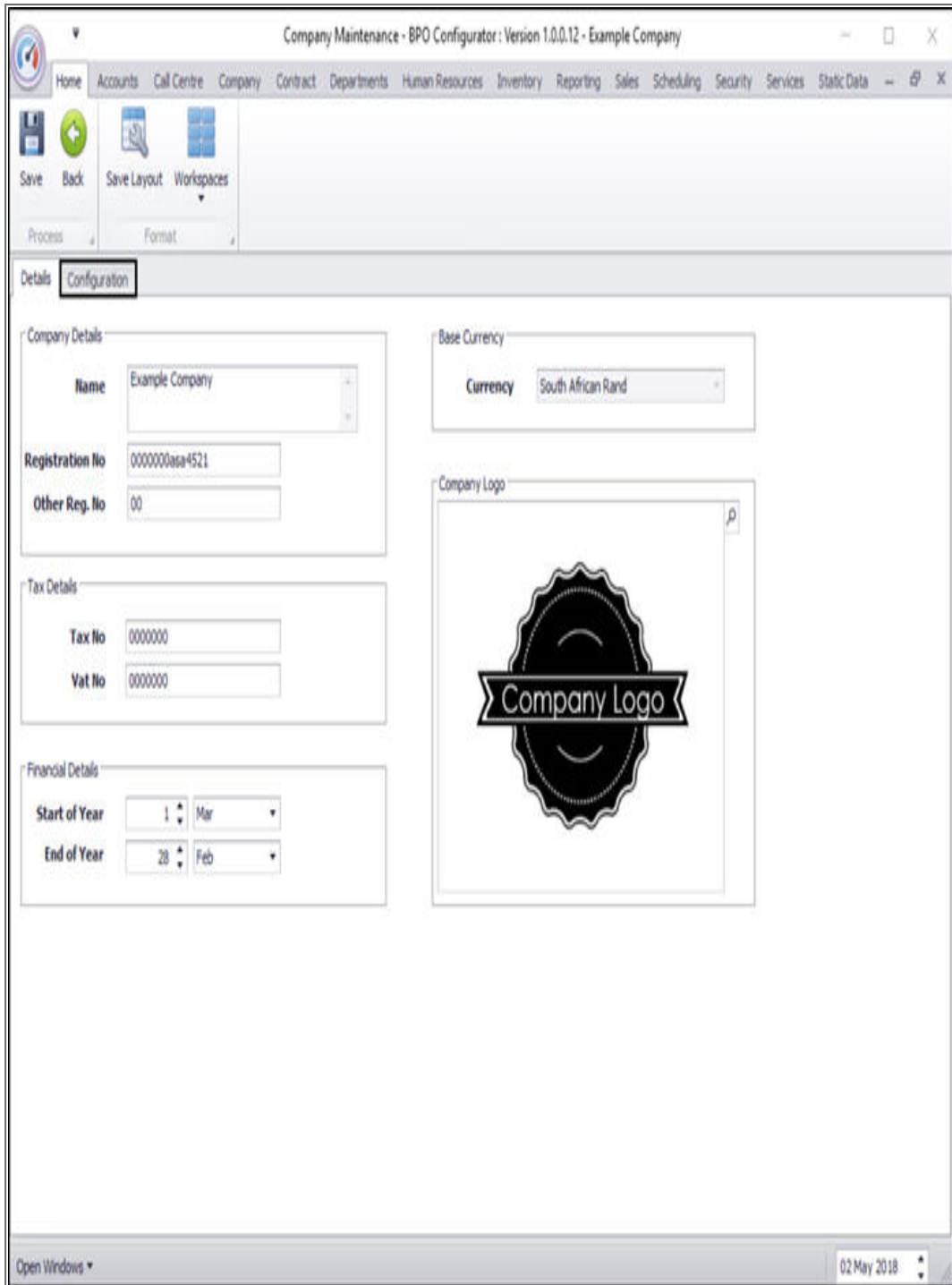
COMPANY – SETTING UP TAX RATES

Tax rates need to be set up so that you can add tax to items e.g. **15%** VAT on stock sold.

Ribbon Access: Configurator > Company > Company



- The **Company Maintenance** screen will be displayed.
- Click on the **Configuration** tab.



- You can now view the **Tax Rates** frame.
- **Right click** anywhere in a **row** of the **Tax Rates** data grid.

- A **Maintain** menu will pop up.
- Click on **Add** - Add New Tax Rate.

The screenshot shows the 'Company Maintenance - BPO Configurator' application. The 'Settings' panel on the left lists various configuration options. The main area displays 'Work Order Configuration', 'Project Configuration', and 'New Asset Configuration' sections. At the bottom, a 'Tax Rates' table is visible, and a 'Maintain' menu is overlaid on it.

TaxType	TaxTypeDesc	Code	TaxCodeDesc	Rate	Default	AccountSystemCode	AmendDate
VAT	Value Added Tax	3	Zero Rated	0.00	No	6	2018/05/03
VAT	Value Added Tax	1	Standard Rate	15.00	No	1	2018/05/03
VAT	Value Added Tax	5	Old Standard Rate	14.00	No	1	2018/05/03

The 'Maintain' menu is open, showing two options:

- Add** (with a plus icon): Add New Tax Rate
- Delete** (with a minus icon): Delete Tax Rate

- The final row in the data grid will be **'activated'**.
- The **Tax Type**, **Tax Type Description**, **Rate** and **Default** columns will now be populated.

The screenshot shows the 'Company Maintenance - BPO Configurator: Version 1.0.0.12 - Example Company' window. The 'Configuration' tab is active, showing various settings for Work Order, Project, and Asset configurations. At the bottom, the 'Tax Rates' table is visible, with the final row highlighted in blue and its 'Default' column set to 'No'.

TaxType	TaxTypeDesc	Code	TaxCodeDesc	Rate	Default	AccountSystemCode	AmendDate
VAT	Value Added Tax	3	Zero Rated	0.00	No	6	2018/05/03
VAT	Value Added Tax	1	Standard Rate	15.00	No	1	2018/05/03
VAT	Value Added Tax	5	Old Standard Rate	14.00	No	1	2018/05/03
VAT	Value Added Tax			0.00	No		

- Click in the **Code** text box to reveal an **ellipsis** button.
- Click on this button to display the **Select a tax code** pop up screen.
- Click on the **row selector** in front of the **tax code** that you wish to **link** to this company.
- Click on **Ok**.

The screenshot shows the 'Company Maintenance - BPO Configurator: Version 1.0.0.12 - Example Company' interface. The 'Tax Rates' table is visible, and a 'Select a tax code' dialog is open over it.

Code	TaxCodeDesc	Rate	Default	AccountSystemCode	AmendDate
3	Zero Rated	0.00	No	6	2018/05/03
1	Standard Rate	15.00	No	1	2018/05/03
5	Old Standard Rate	14.00	No	1	2018/05/03
...		0.00	No		

Code	CodeDescription
0	Zero Rated
2	Exempt

- The **Code** and **Tax Code Desc** columns will now populate with the selected code details.

- Click in the **Rate** text box and either type in or use the directional arrows to select the tax rate (**percentage** value).

TaxType	TaxTypeDesc	Code	TaxCodeDesc	Rate	Default	AccountSystemCode	AmendDate
VAT	Value Added Tax	3	Zero Rated	0.00	No	6	2018/05/03
VAT	Value Added Tax	1	Standard Rate	15.00	No	1	2018/05/03
VAT	Value Added Tax	5	Old Standard Rate	14.00	No	1	2018/05/03
I VAT	Value Added Tax	2	Exempt	0.00	No		

- Click in the **Default** text box to reveal a drop-down menu.
 - Click on **Yes** if the Tax Rate is to be used by default.
 - Click on **No** if the Tax Rate is not to be used by default.

Company Maintenance - BPO Configurator: Version 1.0.0.12 - Example Company

Home Accounts Call Centre Company Contract Departments Human Resources Inventory Reporting Sales Scheduling Security Services Static Data

Save Back Save Layout Workspaces

Process Format

Details Configuration

Settings

FlagDesc	Value
... Post Account Journals	Yes
... Debtors Aging Method	STATEMENT
... Single Asset Fill	No
... Auto Apply Task Configuration to W/O	No
... Auto Accept Call Assignment	No
... Auto Call Status Change Email	Yes
... Auto Customer Code	Yes
... Auto Approve Asset Disposals	Yes
... Auto Receipt Debit Order	No
... Auto Sale Stock Issue	Yes
... Auto Schedule	Yes
... Include Yield shortfalls in Billing Batch	No
... Batch Tracking	Yes
... B Class Part acts as Service	Yes
... Call Centre Default Period (Days)	180
... Call Error Code Mandatory	No
... Check Credit Limit	Yes
... Check Credit Terms	Yes
... Make provision for back to back config...	No
... Allow concurrent open work orders	No
... Contract Closure Call	No
... Document Repository Path	\\SYD8000...

Work Order Configuration

Default WO Type: Default

Default Priority: 2

Project Configuration

Auto Ref:

Ref Prefix: PRJ

Next Project No: 292

New Asset Configuration

Default Type: Default type for ne...

Default Class: Default class for ne...

Default Category: Default category for...

Asset Numbering

Auto Ref:

Ref Prefix: AREG

Next Asset Reg No: 329

Tax Rates

TaxType	TaxTypeDesc	Code	TaxCodeDesc	Rate	Default	AccountSystemCode	AmendDate
VAT	Value Added Tax	3	Zero Rated	0.00	No	6	2018/05/03
VAT	Value Added Tax	1	Standard Rate	15.00	No	1	2018/05/03
VAT	Value Added Tax	5	Old Standard Rate	14.00	No	1	2018/05/03
I VAT	Value Added Tax	2	Exempt	0.00	No		

Open Windows

02 May 2018

- Click in the **Account System Code** text box and type in an **account system code** for this new tax rate.

Company Maintenance - BPO Configurator: Version 1.0.0.12 - Example Company

Home Accounts Call Centre Company Contract Departments Human Resources Inventory Reporting Sales Scheduling Security Services Static Data

Save Back Save Layout Workspaces

Process Format

Details Configuration

Settings

FlagDesc	Value
Post Account Journals	Yes
Debtors Aging Method	STATEMENT
Single Asset Fill	No
Auto Apply Task Configuration to W/O	No
Auto Accept Call Assignment	No
Auto Call Status Change Email	Yes
Auto Customer Code	Yes
Auto Approve Asset Disposals	Yes
Auto Receipt Debit Order	No
Auto Sale Stock Issue	Yes
Auto Schedule	Yes
Include Yield shortfalls in Billing Batch	No
Batch Tracking	Yes
B Class Part acts as Service	Yes
Call Centre Default Period (Days)	180
Call Error Code Mandatory	No
Check Credit Limit	Yes
Check Credit Terms	Yes
Make provision for back to back config...	No
Allow concurrent open work orders	No
Contract Closure Call	No
Document Repository Path	\\SYDB000...

Work Order Configuration

Default WO Type: Default
 Default Priority: 2

Project Configuration

Auto Ref:
 Ref Prefix: PRJ
 Next Project No: 292

New Asset Configuration

Default Type: Default type for ne...
 Default Class: Default class for ne...
 Default Category: Default category for...

Asset Numbering

Auto Ref:
 Ref Prefix: AREG
 Next Asset Reg No: 329

Tax Rates

TaxType	TaxTypeDesc	Code	TaxCodeDesc	Rate	Default	AccountSystemCode	AmendDate
VAT	Value Added Tax	3	Zero Rated	0.00	No	6	2018/05/03
VAT	Value Added Tax	1	Standard Rate	15.00	No	1	2018/05/03
VAT	Value Added Tax	5	Old Standard Rate	14.00	No	1	2018/05/03
I VAT	Value Added Tax	2	Exempt	0.00	No		

Open Windows ▾ 02 May 2018

- When you have finished adding the new tax rate details, press **Enter**.

- **Note:** The **Amend Date** column will be adjusted by the system.
- The new tax rate code will be **saved** and a **new row** will be added the **Tax Rates** data grid.
- Click on **Save** .

Company Maintenance - BPO Configurator: Version 1.0.0.12 - Example Company

Home Accounts Call Centre Company Contract Departments Human Resources Inventory Reporting Sales Scheduling Security Services Static Data

Save Back Save Layout Workspaces

Process Format

Details Configuration

Settings

FlagDesc	Value
Post Account Journals	Yes
Debtors Aging Method	STATEMENT
Single Asset Fill	No
Auto Apply Task Configuration to WO	No
Auto Accept Call Assignment	No
Auto Call Status Change Email	Yes
Auto Customer Code	Yes
Auto Approve Asset Disposals	Yes
Auto Receipt Debit Order	No
Auto Sale Stock Issue	Yes
Auto Schedule	Yes
Include Yield shortfalls in Billing Batch	No
Batch Tracking	Yes
B Class Part acts as Service	Yes
Call Centre Default Period (Days)	180
Call Error Code Mandatory	No
Check Credit Limit	Yes
Check Credit Terms	Yes
Make provision for back to back config...	No
Allow concurrent open work orders	No
Contract Closure Call	No
Document Repository Path	\\SY08000...

Work Order Configuration

Default WO Type: Default
 Default Priority: 2

Project Configuration

Auto Ref:
 Ref Prefix: PRJ
 Next Project No: 292

New Asset Configuration

Default Type: Default type for ne...
 Default Class: Default class for ne...
 Default Category: Default category for...

Asset Numbering

Auto Ref:
 Ref Prefix: AREG
 Next Asset Reg No: 329

Tax Rates

TaxType	TaxTypeDesc	Code	TaxCodeDesc	Rate	Default	AccountSystemCode	AmendDate
VAT	Value Added Tax	3	Zero Rated	0.00	No	6	2018/05/03
VAT	Value Added Tax	1	Standard Rate	15.00	No	1	2018/05/03
VAT	Value Added Tax	5	Old Standard Rate	14.00	No	1	2018/05/03
VAT	Value Added Tax	2	Exempt	0.00	No	5	

Open Windows

02 May 2018

MNU.091.010

