# Set Up Tax Authorities

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## Tax Authorities Defined

RentalPoint is capable of storing several different taxes that can be used when a business has a wide operating area. There are times when bookings are created in another branch that can be in another area of the country or even in a completely different country. For this reason there may be a need to store multiple tax types that can be applied to bookings and sales. Creating and editing taxes in RentalPoint can be done via the Tax Authorities option in the setup menu.

## Parameters Used in Conjunction with Tax Authorities

| Parameter | Function |
|---|---|
| Pricing #34 | Set this parameter to let RentalPoint know the price you would like to charge tax on |
| Pricing #41 | Set this parameter to let RentalPoint know if settlement discount should be taxed |
| Pricing #45 | Set this parameter to let RentalPoint know if taxes should be rounded up or down |
| Operational # 74 | Set this parameter to tell RentalPoint to use either Location Record Tax defaults OR the defaults as set up in the Tax Authority Table ***in each Customer Record*** |
| Operational #133 | Set this parameter to tell RentalPoint to display the Tax Authorities in NAME or NUMBER order for any drop down list of Tax Authorities |
| Operational # 134 | Set this parameter to tell RentalPoint to use either Customer Record Tax defaults OR Location Record Tax Defaults ***in a booking*** |
| Operational #164 | Set this parameter to tell RentalPoint to load Vendor Tax Defaults on a PO |
| Operational #165 | Set this parameter to tell RentalPoint to display tax fields on a PO |
| Operational #169 | Set this parameter to tell RentalPoint to display tax fields in Vendor Properties |

## Operator Privileges Affecting Tax Authorities

Edit the GROUP record the operator belongs to and check out figure 1.1 and 1.2 below for more details.

Fig 1.1

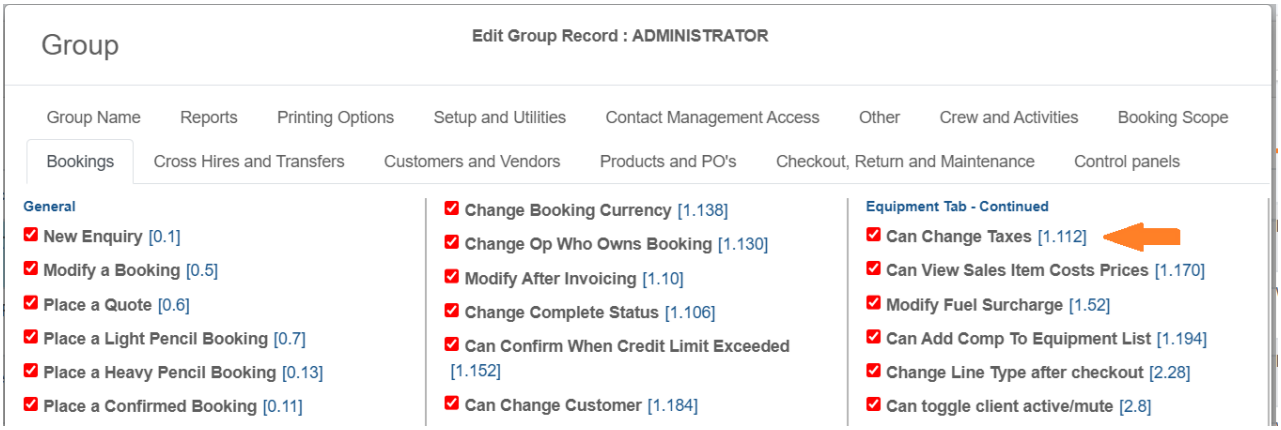
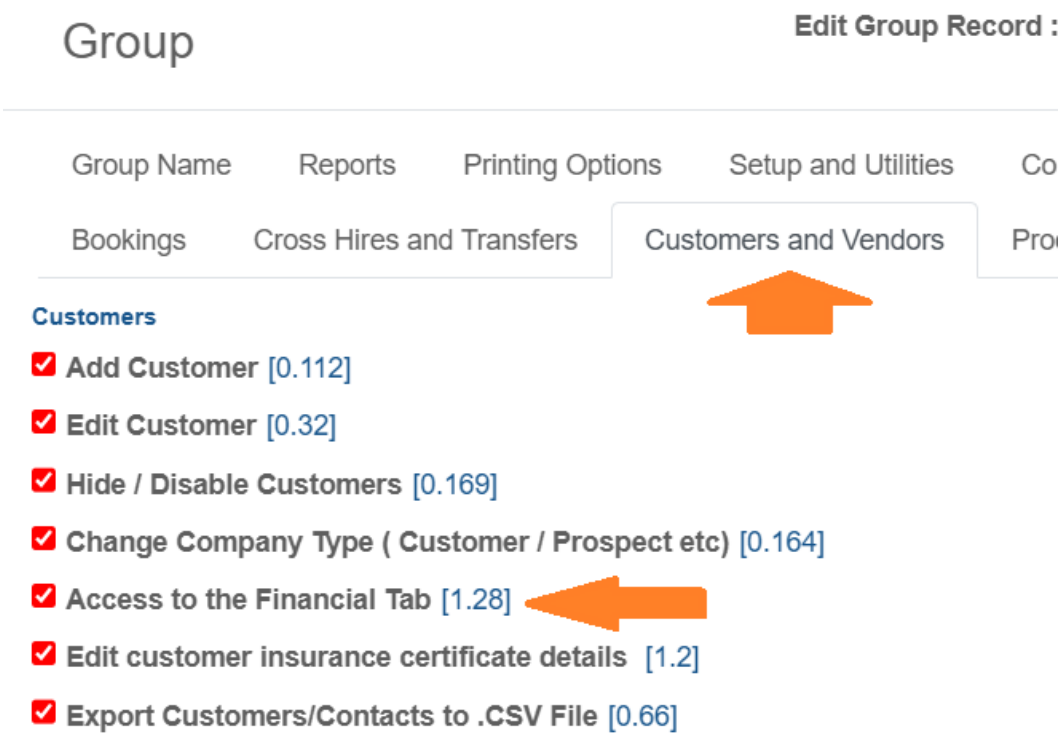



Fig 1.2



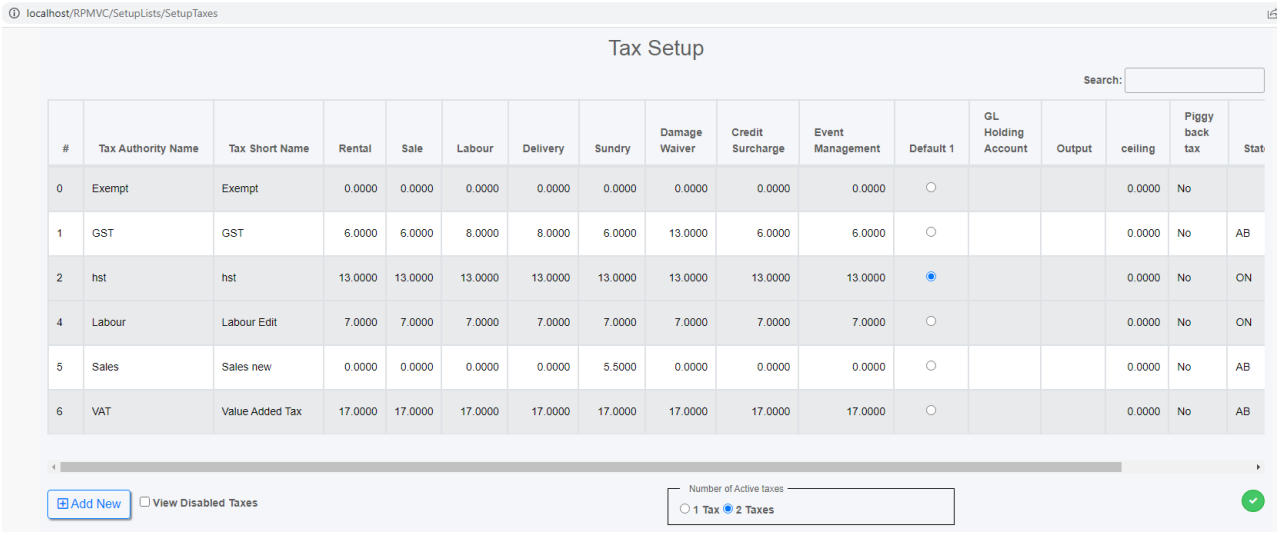

## Adding / Editing Tax Authorities

*To enter a new tax click **Add New** and a new tax row will display in the list. The tax can now be configured to specifications.*

*When editing a tax authority, RentalPoint will not overwrite the existing tax authority. The existing tax will be disabled and the system will enter a new one. This ensures that all existing transactions (ie. bookings, invoices etc) will maintain their original tax percentage;*

*Existing Bookings will not be automatically recalculated to reflect the new percentage you have added. All new transactions however will use the new rate.*

*Fig 1.3*




| # | Tax Authority Name | Tax Short Name | Rental | Sale | Labour | Delivery | Sundry | Damage Waiver | Credit Surcharge | Event Management | Default 1 | GL Holding Account | Output | ceiling | Piggy back tax | Stat |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 0 | Exempt | Exempt | 0.0000 | 0.0000 | 0.0000 | 0.0000 | 0.0000 | 0.0000 | 0.0000 | 0.0000 | ○ | | | 0.0000 | No | |
| 1 | GST | GST | 6.0000 | 6.0000 | 8.0000 | 8.0000 | 6.0000 | 13.0000 | 6.0000 | 6.0000 | ○ | | | 0.0000 | No | AB |
| 2 | hst | hst | 13.0000 | 13.0000 | 13.0000 | 13.0000 | 13.0000 | 13.0000 | 13.0000 | 13.0000 | ◉ | | | 0.0000 | No | ON |
| 4 | Labour | Labour Edit | 7.0000 | 7.0000 | 7.0000 | 7.0000 | 7.0000 | 7.0000 | 7.0000 | 7.0000 | ○ | | | 0.0000 | No | ON |
| 5 | Sales | Sales new | 0.0000 | 0.0000 | 0.0000 | 0.0000 | 5.5000 | 0.0000 | 0.0000 | 0.0000 | ○ | | | 0.0000 | No | AB |
| 6 | VAT | Value Added Tax | 17.0000 | 17.0000 | 17.0000 | 17.0000 | 17.0000 | 17.0000 | 17.0000 | 17.0000 | ○ | | | 0.0000 | No | AB |

To adjust a tax that was previously disabled, click the '**View disabled taxes**' option on the bottom left of the screen.

- The '**Ceiling**' column is the dollar limit the tax stops at. For example, if you have a booking for $150 and the ceiling is set at $100, the customer is only charged tax on the first $100 and not the remaining $50. The ceiling limit is applied on the total invoice value.  By default, a zero is loaded into the ceiling column denoting that the entire amount should be taxed.
- A '**Piggy Back**' tax is a tax that is charged on top of another tax.

## Default Tax Authorities

RentalPoint allows you to setup default taxes for Customer Record,  Location or Tax Authority Setup.  Once set up the defaults used are dependent on the parameter settings *see parameters used in conjunction with tax authorities in section 2 above for more information*

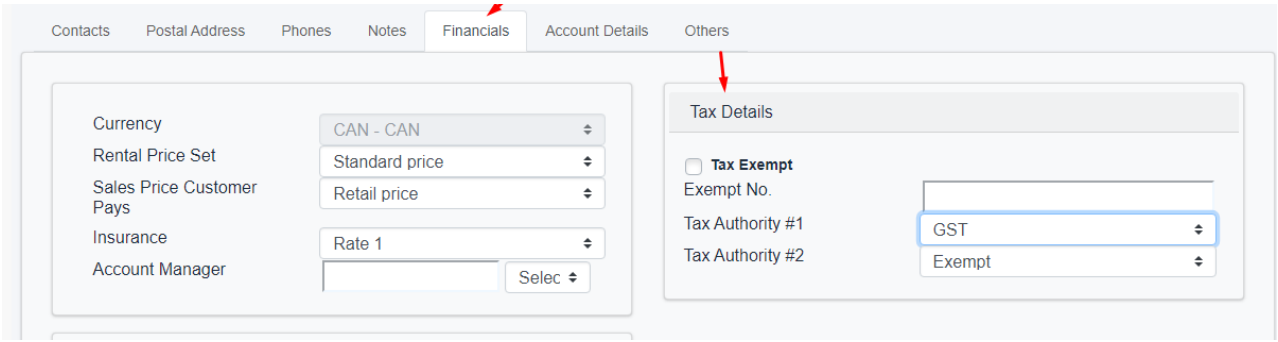
**In Tax Authority Set Up**

To set a default select the desired line in the grid and click  **Tax #1 Default.** To set a second default select a different line and click **Tax #2 Default ,** *see figure 1.3 above*

You can also select the same tax line as both tax 1 and tax 2 default, i.e. if you want to have exempt as the default for both taxes.

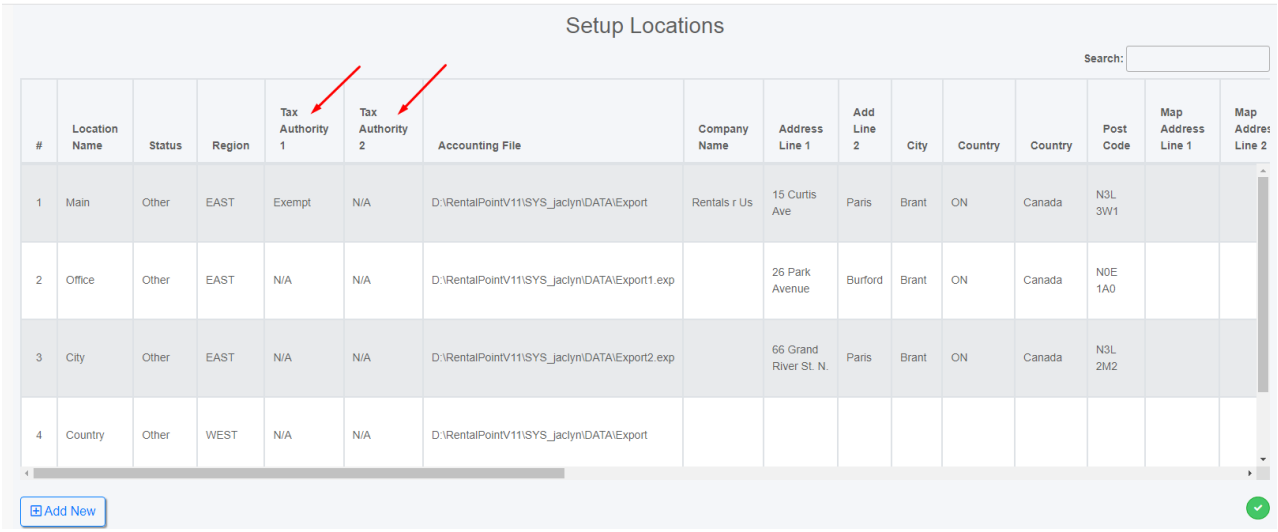
**In Customer Setup**

Access default customer/vendor taxes on the 'financials' tab




**In Location Setup for Multi Location Systems**

For multi-location systems default taxes can also be set for each location, tusing the  Set-up > Locations menu option.




# Changing Default Tax Authorities

Changing default tax authorities is a two step process.  You must set up the new tax authority AND set it in place of your old default.  The changes here will depend on how you set your defaults above (i.e. by Tax Authority Setup, Location, Customer, Vendor).  The new tax authority will be reflected on all NEW bookings.  It will NOT affect current bookings unless you edit the booking and change the tax authorities.

**Steps to Change Tax Authority**

1. Disable the old tax authority in the setup->tax authorities table
2. Create new tax authority
3. Set the new tax authority as default1
4. Update each customer record/location record with the new default tax authorities.
5. In order to change all customers/Locations you need to manually enter each customer record to update the default tax authorities OR import the new defaults from an excel file

**Update Customer Records with New Default Tax Authority via Export/Import**

1. Take a backup of your database first
2. Export your Customer table to an excel file (via others, import/export, export customers), under the fields tab choose customer name, organization, tax authority 1 and tax authority 2), save the file with a .csv extension

3. Edit the excel file produced For the Tax Authority fields
4. Enter the NUMBER of the NEW tax authority as set up in the 'setup tax authorities' option
5. Save as a .csv file
6. In RentalPoint via the 'others' tab import file, customer, and match the fields in your excel file to the fields you want to update in the customer table.

 If you have an IT person on staff they should be able to do this for you, however if you need help please feel free to email support@rentp.com