

ADM Taxation Method – Operator



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Introduction

You now have the ability to see an Orgs preferred taxation method, which can be either *Tax Category* or *Item Level*. You can view how ADM should be handling the taxation for your Org and its locations.

Purpose

The purpose of this document is to show you how to view the tax rates and tax structure for the different locations in your Org.

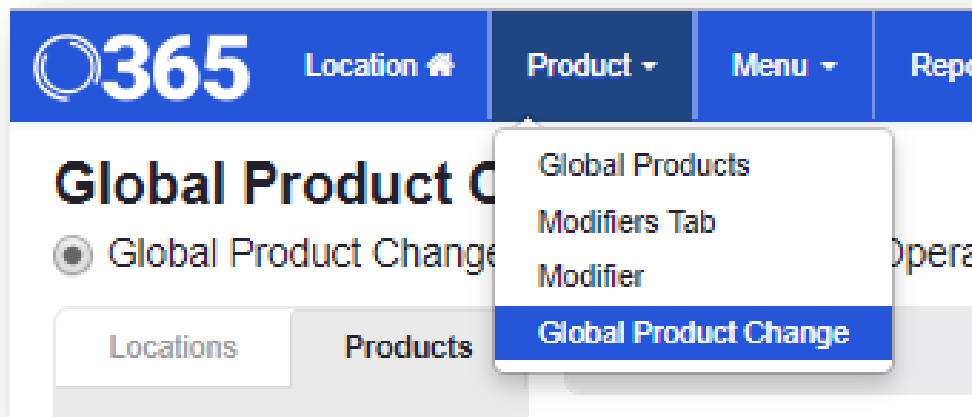
A new Item Level tax method is now available on ADM in addition to the traditional Tax Category method. This new Item Level tax method allow you to set flat tax amounts for products instead of using the rate mapping system.

How to view taxes in ADM

Viewing taxes under Global Product Change

Using the Global Product Change feature, you can change tax rates on multiple products at once.

1. Sign into ADM.
2. Click the **Product** tab.



3. Click **Global Product Change** from the drop-down menu.
4. Click on several **locations** from the *Locations* column in the **Global Product Change** screen.
5. Click **Apply** at the end of the list. A list of products from the selected locations will display.



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- Click on the **products** whose tax rate you want to change.
- Click **Next** in the lower right of the screen. The following screen will display.

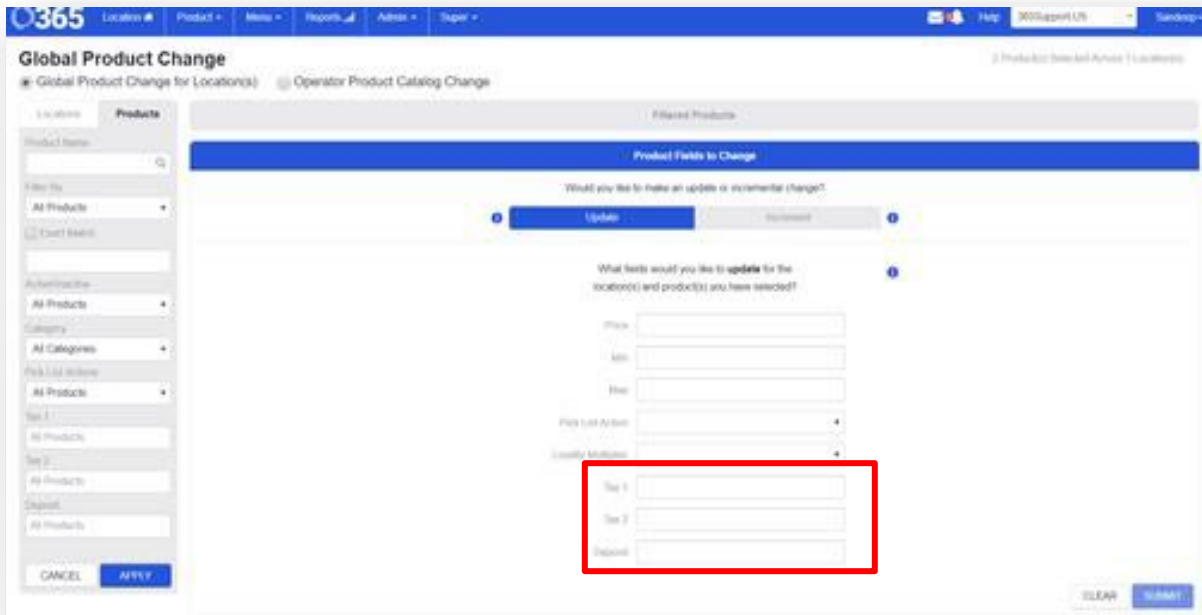
You will see the following five blank fields if the tax method is set to *Tax Category*:

- Price
- Min
- Max
- Pick List Action
- Loyalty Multiplier

You can enter data in the fields to reflect the changes you want in the products at the locations that you selected.

If the tax level is set to *Item Level*, you will also see these additional blank fields:

- Tax 1
- Tax 2
- Deposit



Tabs

The Product, Tax Mapping and Deposit Mapping tabs all show various tax and deposit information. You can only see the **Tax Mapping** and **Deposit Mapping** tabs if you are using the *Tax Category* tax method. If you are using the *Item Level* method, these two tabs will not be visible.

Product tab

The following steps will show you how to view your taxes whether you are using the *Item Level* or *Tax Category* tax method. The columns in the table pull in tax and deposit data from the tax method. You can choose which columns you want to see in the table.

1. Click on the **Location** tab in ADM. The **Location List** screen displays.
2. Click the **location** you want to view from the *Location Name* column. The **Location Summary** screen will display.
3. Scroll to the tabs at the bottom of the **Location Summary** screen.

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4. Click the **Products** tab. A table with 11 columns will display.

The screenshot shows the ADM interface with the 'Products' tab selected. The 'Manage Columns' button is highlighted in red. Below the buttons, there is a 'Show' dropdown set to '50' records and a 'Clear Filters' button. The main table displays product information with 11 columns: Name, Scancode, Category 1, Price, Tax 1, Deposit, Min Stock, Max Stock, In Inv, Case, and Picklist Action. The table contains 5 matching records.

| Name | Scancode | Category 1 | Price | Tax 1 | Deposit | Min Stock | Max Stock | In Inv | Case | Picklist Action |
|-------------------------------|--------------|---------------|--------|-------|---------|-----------|-----------|--------|------|---------------------|
| CA Candy | 132456798 | CA TEST CAT | \$7.50 | 0.00% | \$0.00 | 0 | 0 | 0 | 0 | At or Below Minimum |
| Cherry Coke | 04905004 | | \$0.75 | 0.00% | \$0.00 | 0 | 0 | 0 | 0 | Below Maximum |
| Coke Cherry Zero | 049000047561 | | \$0.75 | 0.00% | \$0.00 | 0 | 0 | 0 | 0 | Below Maximum |
| Lifesavers wint-o-green mints | 022000104304 | GUM AND MINTS | \$0.75 | 0.00% | \$0.00 | 0 | 0 | 0 | 0 | Below Maximum |
| test123456 | test123456 | | \$6.49 | 0.00% | \$0.00 | 0 | 0 | 0 | 0 | Below Maximum |

Note: If you don't see the fields you want:

- Click the **Manage Column** button.
- Select the fields you would like to see from the list.
- Click the **Apply** button at the bottom of the list. The columns you selected will display in the table.

The 'Manage Columns' dialog box is shown with a list of fields. The 'Apply' button at the bottom is highlighted with a red box.

- Show Tax 2
- Show Deposit Cat
- Hide Deposit
- Show Type
- Show Cost
- Show UM
- Show Weight
- Show Tareweight
- Show Printer
- Show Userkey
- Show ISDISABLED
- Show Loyalty Multiplier
- Hide Min Stock
- Hide Max Stock
- Hide In Inv
- Hide Case
- Hide Picklist Action

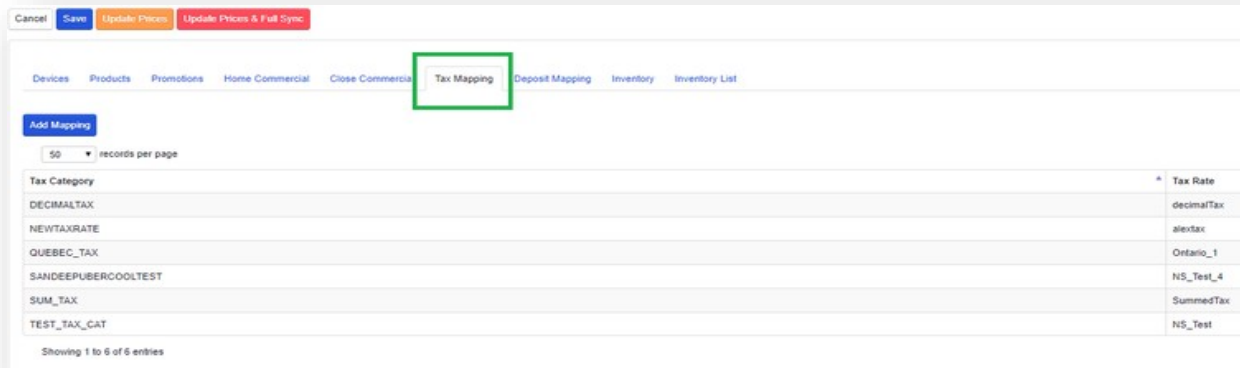
Apply Cancel

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Tax Mapping tab

The **Tax Mapping** tab shows all of the available tax rates that are currently running at the selected location.

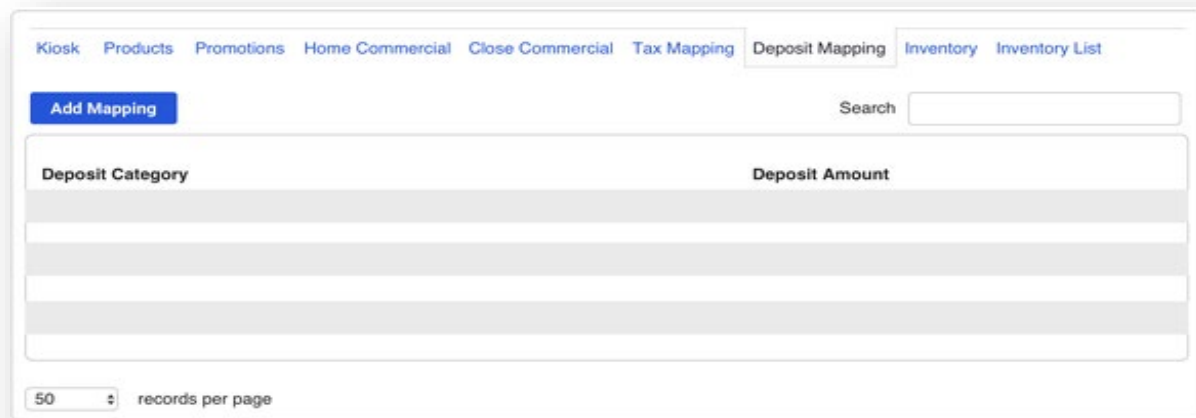
1. Go back to the **Location Summary** screen.
2. Scroll to the tabbed sections at the bottom of the screen.
3. Click the **Tax Mapping** tab. The *Tax Category* and *Tax Rate* columns will display.



Deposit Mapping tab

On the **Locations Summary** screen, you will be able to see the **Deposit Mapping** tab. This tab pulls in tax and deposit data.

1. Go back to the **Location Summary** screen.
2. Scroll to the tabbed sections at the bottom of the screen.
3. Click the **Deposit Mapping** tab. The *Deposit Category* and *Deposit Amount* columns are displayed.



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Screens

You can only see the **Tax List** and **Deposit List** screens if you are using the *Tax Category* tax method. If you are using the *Item Level* method, these two screens will not be visible.

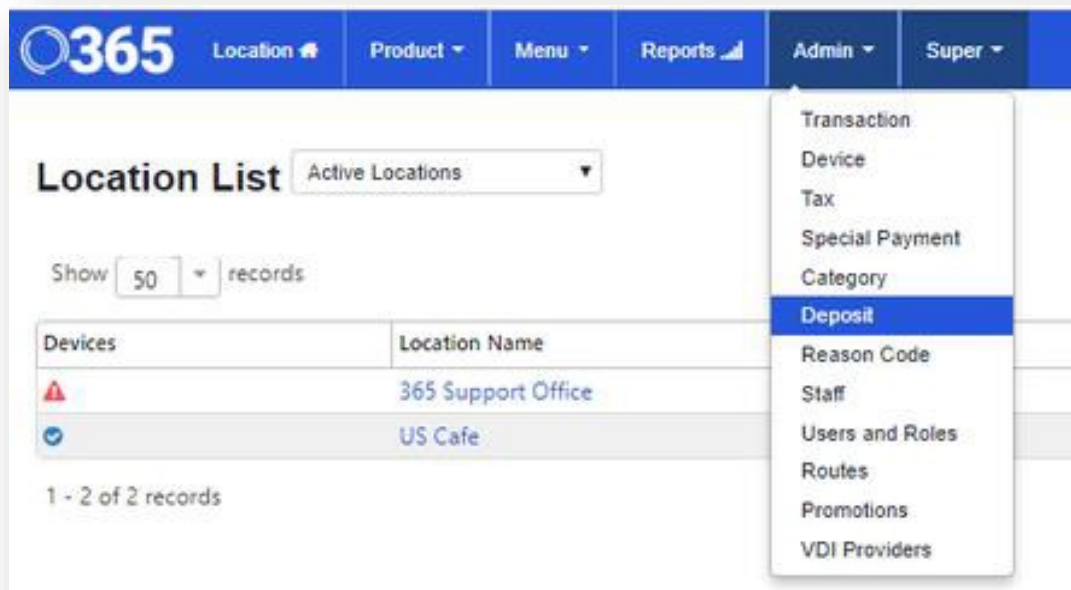
Tax List screen

In the **Tax List** screen you can create a new tax rate or edit previously created tax rates by deleting the rate and adding a new rate in its place.

1. Click the **Admin** tab in ADM.
2. Select **Tax** from the drop-down menu. The **Tax List** screen displays.
3. Click on the **location** where you want to edit or create a new tax rate. The **Tax Rates** screen displays.

Deposit List screen

The **Deposit List** screen shows how deposits are being handled for a particular Org. They show the current list of deposit rates and provide the ability to create new deposit rates. When a deposit is created, you can set the deposit amount, the effective date and the end date.



1. Click on the **Admin** tab in ADM.
2. Select **Deposit** from the drop-down menu. The **Deposit List** screen displays listing all of the deposits for that org.
3. Click on a **deposit**. The **Deposit Amounts** screen displays where you can edit or add a deposit.