

## Checking Sales Tax Rates:

### Step 1 – Are Sales Tax Rates Set Correctly

The following screens will show you step by step how to find and change tax rates. Note that the example database is set to 8.4%.

1. Go to back office
2. From the GENERAL drop down select TAX TYPES



- The top box on this form may have MORE than 1 Tax Type called State Tax (establishments serving liquor may have more than one). This exercise should be done for ALL active Tax Types

**Tax Types**

Tax Type	Description	Active?
State Tax	State Tax	<input checked="" type="checkbox"/>
*		<input checked="" type="checkbox"/>

**1. Select or enter a Tax Type.**  
**2. Select a Business (Note: Each business has its own composite tax structures.)**  
**3. Select an Order Type.**  
**4. Enter Tax Composite rates that apply.**

**Tax Structures for Business:** The Woods3 **Rate Report**

**Order Type Information:**

Order Type	Tax Included in Price?
Carry Out	<input checked="" type="checkbox"/>
Delivery	<input type="checkbox"/>
DriveThru	<input type="checkbox"/>
HandHeld	<input type="checkbox"/>
Phone In	<input type="checkbox"/>
Walk-In	<input type="checkbox"/>
*	<input checked="" type="checkbox"/>

**Composite Tax Structure for Order Type:**

Tax Composite	Tax	Tax GI Acct
*	0.00%	

**Net Tax Percent:**

- The box on the bottom LEFT shows ORDER TYPES available in your system. Do the following steps for ALL active ORDER TYPES.

**Tax Types**

Tax Type	Description	Active?
State Tax	State Tax	<input checked="" type="checkbox"/>
*		<input checked="" type="checkbox"/>

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**4. Enter Tax Composite rates that apply.**

**Tax Structures for Business:** The Woods3 **Rate Report**

**Order Type Information:**

Order Type	Tax Included in Price?
Carry Out	<input checked="" type="checkbox"/>
Delivery	<input type="checkbox"/>
DriveThru	<input type="checkbox"/>
HandHeld	<input type="checkbox"/>
Phone In	<input type="checkbox"/>
Walk-In	<input type="checkbox"/>
*	<input checked="" type="checkbox"/>

**Composite Tax Structure for Order Type:**

Tax Composite	Tax	Tax GI Acct
*	0.00%	

**Net Tax Percent:**

- If you click in the column with the STAR in it adjacent to your active ORDER TYPES, you will see the bottom RIGHT hand box change. It will show you the tax rate for each of these ORDER TYPES. We set the tax rate by order type because, in some states, food consumed OFF premise is taxed differently than food consumed on premise. Simply select each of these one at a time, and set the correct rate by type is “.085” if you want the result to be 8.5% (for example).

**Tax Types**

Tax Type	Description	Active?
State Tax	State Tax	<input checked="" type="checkbox"/>
*		<input checked="" type="checkbox"/>

**1. Select or enter a Tax Type.**  
**2. Select a Business (Note: Each business has its own composite tax structures.)**  
**3. Select an Order Type.**  
**4. Enter Tax Composite rates that apply.**

**Tax Structures for Business:** The Woods3 Rate Report

**Order Type Information:**

Order Type	Tax Included in Price?
Carry Out	<input type="checkbox"/>
Delivery	<input type="checkbox"/>
DriveThru	<input type="checkbox"/>
HandHeld	<input type="checkbox"/>
Phone In	<input type="checkbox"/>
Walk-In	<input type="checkbox"/>
*	<input type="checkbox"/>

**Composite Tax Structure for Order Type:**

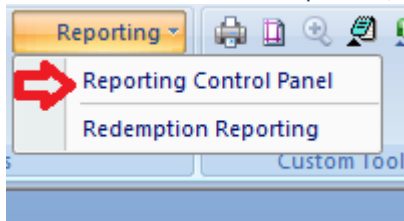
Tax Composite	Tax	Tax GI Acct
State Tax	8.40%	345.00
*	0.00%	

**Net Tax Percent:** 8.40%

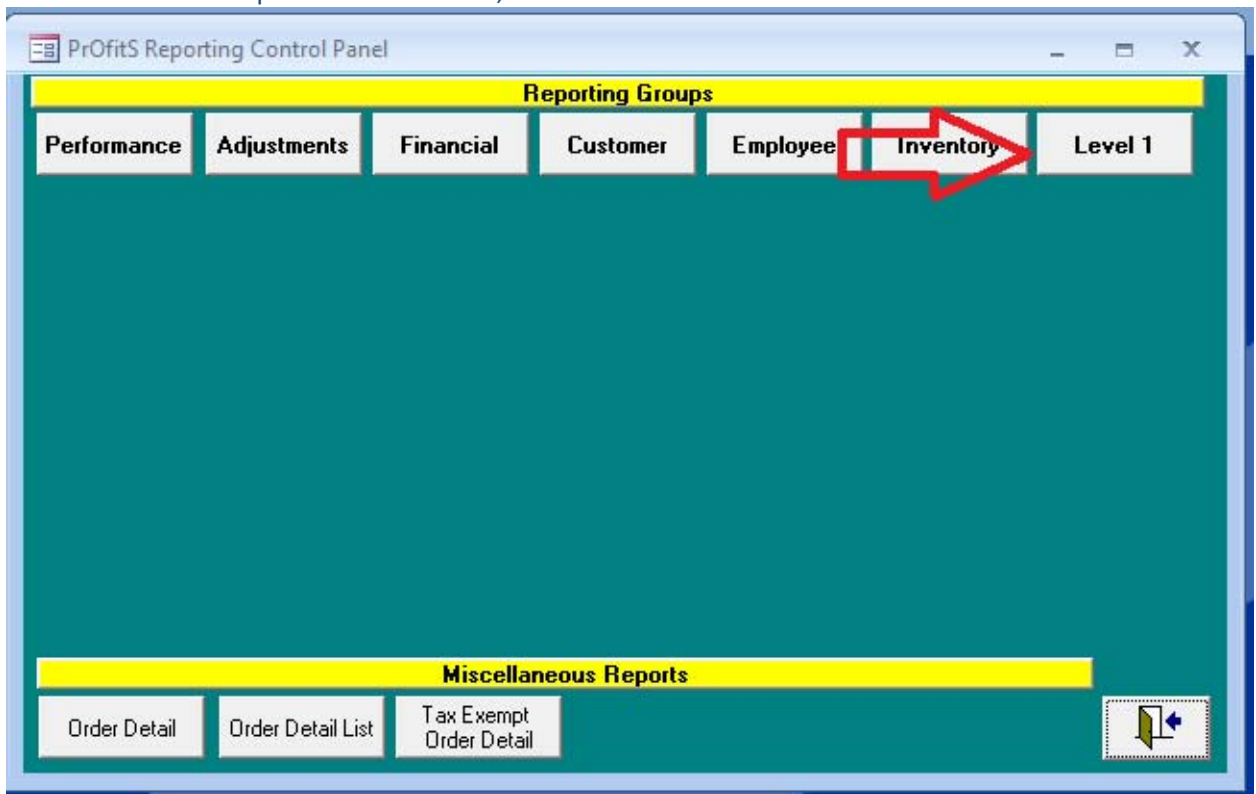
## Step 2 – Are All Menu Items Set to Tax Correctly

The following screens will show you step by step how to find items that are not set to tax in your system.

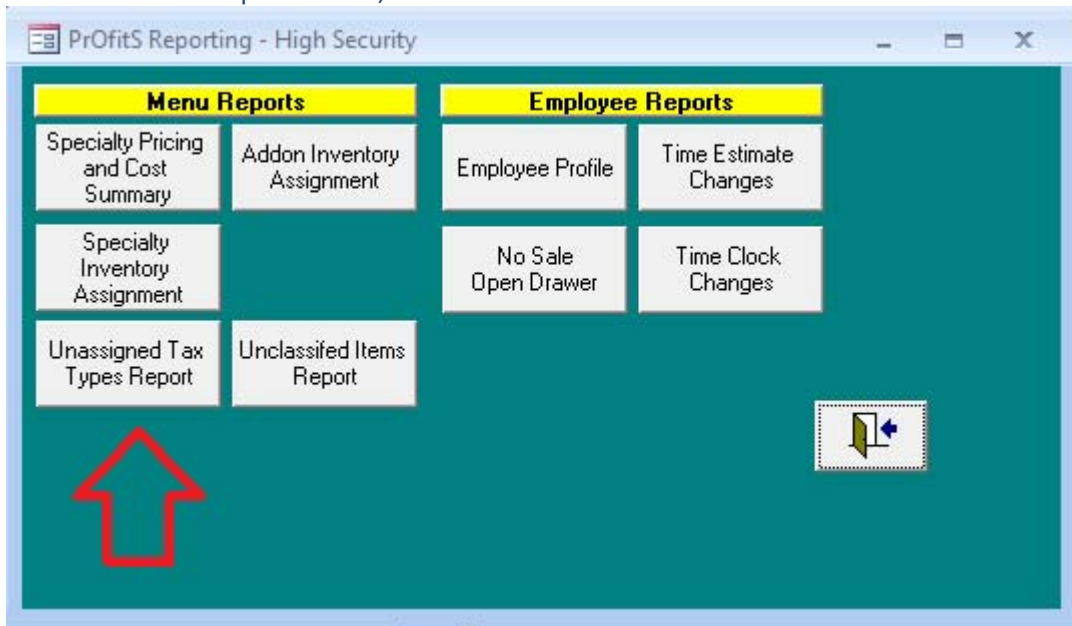
1. Go to back office
2. From the REPORTING dropdown, select REPORTING CONTROL PANEL



3. From the resultant report selection menu, choose LEVEL 1



- From the LEVEL 1 reports menu, select UNASSIGNED TAX TYPES REPORT



- This report can be printed or displayed. It includes any item that is non zero (i.e. for which you charge the customer) that has no assigned tax type. This will include Gift Cards (if you are using the Gift Card function in your system). Normally Gift Cards are **not** taxed at sale since the items they are used to buy are taxed later.

Menu Group	Button Display Label	Tape Label
<i>Specialties</i>		
Misc. Charge	Gift Cert	Gift Cert
Pizzas	YMCA	YMCA Cheese
Pizzas	School NT	School Pizza
<i>Addons</i>		
Desserts	Pow Sugar	Powered Sugar
Desserts	CinnaGlaze	CinnaGlaze
N/A	Olives	Olives
N/A	Bacon	Bacon
N/A	Banana Peppe	Banana Peppers
N/A	Eggplant	Eggplant
N/A	Garlic	Garlic
N/A	Ham	Ham
N/A	Jalepeno	Jalepeno
N/A	Mushrooms	Mushrooms
N/A	Tomato	Tomato
N/A	Onion	Onion
N/A	Peperoni	Pepperoni
N/A	Peppers	Peppers
N/A	Pineapple	Pineapple
N/A	Salami	Salami

- To correct this (i.e. to assign TAX TYPES to items), go to Menu Painter, select the item, and choose the correct TAX TYPE from the drop down box.