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



3. 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

ax Types: Tax Type - Description - Active'i - State Tax V *					<ol> <li>Select or enter a Tax Type.</li> <li>Select a Business (Note: Each business has its own composite tax structures.)</li> <li>Select an Order Type.</li> <li>Enter Tax Composite rates that apply.</li> </ol>				
Ta	ax Structures fo der Type Inforr	or Bu natio	usiness: The Woods3		mposite Tax Struc	cture for	Order Type:	Rate	e Report
Ta	<b>x Structures fo</b> der Type Inform Order Type	or Bu matic	tusiness: The Woods3	Con	<b>mposite Tax Stru</b> Tax Composite -	cture for Tax -	Order Type: Tax GI Acct	Rate	Report
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Ta	Ar Structures for Order Type Inform Order Type Carry Out Delivery DriveThru HandHeld	or Bi	Tax Included in Price? -	Cor	mposite Tax Strue Tax Composite -	cture for Tax - 0.00%	<b>Order Type:</b> Tax GIAcct	Rate	Report
Ta	Ar Structures for Order Type Inform Order Type Carry Out Delivery DriveThru HandHeld Phone In	or Bu	Tax Included in Price? -	Cor	mposite Tax Strue Tax Composite -	cture for Tax - 0.00%	Order Type: Tax GIAcct	Rate	Report

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

Tax Type State Tax	Description     State Tax		Active? -		<ol> <li>Select of cincer a ray type.</li> <li>Select a Business (Note: Eabusiness has its own composities structures )</li> </ol>	
		3. Select an Orde 4. Enter Tax Co that apply.		lect an Order Iter Tax Com Ipply.	er Type. nposite rates	
				10.00		
x Structures for ler Type Informa	Business: The Woods3	- Cor	nposite Tax Stru	cture for	Order Type:	Rate Rep
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x Structures for ler Type Informa Order Type Carry Out Delivery	Business: The Woods3 stion: Tax Included in Price? -	Cor	<b>nposite Tax Stru</b> Tax Composite ♀	cture for Tax - 0.00%	Order Type: Tax GI Acct	Rate Rep
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x Structures for ler Type Informa Order Type - Carry Out - Delivery DriveThru HandHeld Phone In Walk-In	Business: The Woods3 ation: Tax Included in Price? -	Cor	nposite Tax Stru Tax Composite - Net Tax Percent:	cture for Tax - 0.00%	Order Type: Tax GI Acct	Rate Rep

5. 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).

itate Tax State Tax		7	2. Se	lect a Busine	ss (Note: Each
			tax st	ess has its ov ructures.) lect an Order	vn composite Type.
			4. Er that a	iter Tax Comp ipply.	posite rates
er Type Information: Order Type - Tax Include	ed in Price? 🚽	mposite Tax Struc Tax Composite 💄	ture for Tax -	Order Type: Tax GLAcct	
Carry Out		State Tax	8.40%	345.00 🥒	
Delivery	*		0.00%		
DriveThru					
HandHeld					
Phone In					
L. J. H. J.	[FT]	Net Tax Percent:	8.402	8	
Walk-In	in the second se				

## 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

E	PrOfitS Repo	rting Control Pan	el				_ = >	ĸ
			R	eporting Group	\$			
	Performance	Adjustments	Financial	Customer	Employee	Inventory	Level 1	
		-117	Miscellar	neous Reports				
	Order Detail	Order Detail List	Tax Exempt Order Detail				Į.	

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

-B PrOfitS Report	ing - High Security			- =	х
Menu	Reports	Employee	Reports	1	
Specialty Pricing and Cost Summary	Addon Inventory Assignment	Employee Profile	Time Estimate Changes		
Specialty Inventory Assignment		No Sale Open Drawer	Time Clock Changes		
Unassigned Tax Types Report	Unclassifed Items Report				
				<b>₽</b> •	

5. 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 <u>not</u> taxed at sale since the items they are used to buy are taxed later.

	Unassigned Tax Type	e Items Report	
Menu Main Men	u		
Menu Group	Button Display Label	Tape Label	
Specialties			
Misc. Charge	Gift Cert	Gift Cert	
Pizzas	YMCA	YMCA Cheese	
Pizzas	School NT	School Pizza	
Addons			
Desserts	PowSugar	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	

6. 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.