
One Blue Hill Plaza, 16th Floor, PO Box 1546
Pearl River, NY 10965
1-800-PC-AMERICA, 1-800-722-6374
(Voice) 845-920-0800 (Fax) 845-920-0880

Tax rates

Sub Total	\$39.99
Tax	\$3.20
Grand Total	\$43.19

This guide will explain how to setup and customize tax rates. As of 12.8xxx CRE now supports up to 6 tax rates that can be customized and applied to items.

TABLE OF CONTENTS

<u>CONFIGURING DEFAULT TAX RATES</u>	<u>3</u>
<u>CONFIGURING AREA TAX RATES</u>	<u>5</u>
<u>ASSIGNING DIFFERENT DEFAULT TAX RATES TO DIFFERENT ITEMS</u>	<u>7</u>
<u>ASSIGNING AN AREA TAX RATE TO A CUSTOMER</u>	<u>9</u>
<u>USING THE AREA TAX RATE</u>	<u>10</u>
<u>TAX RATE IDENTIFIER SYMBOLS</u>	<u>12</u>

Configuring default tax rates

To set up default tax rates, open CRE/RPE, select **Manager**, provide the requested credentials, and then follow these steps.

	<ol style="list-style-type: none"> 1. Select Setup and then Tax Rates. 																												
<table border="1"> <thead> <tr> <th>StoreID</th> <th>Name</th> <th>Rate</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>1001</td> <td>Tax1 Rate</td> <td>0</td> <td>Tax 1</td> </tr> <tr> <td>1001</td> <td>Tax2 Rate</td> <td>0</td> <td>Tax 2</td> </tr> <tr> <td>1001</td> <td>Tax3 Rate</td> <td>0</td> <td>Tax 3</td> </tr> <tr> <td>1001</td> <td>Tax4 Rate</td> <td>0</td> <td>Tax 4</td> </tr> <tr> <td>1001</td> <td>Tax5 Rate</td> <td>0</td> <td>Tax 5</td> </tr> <tr> <td>1001</td> <td>Tax6 Rate</td> <td>0</td> <td>Tax 6</td> </tr> </tbody> </table>	StoreID	Name	Rate	Description	1001	Tax1 Rate	0	Tax 1	1001	Tax2 Rate	0	Tax 2	1001	Tax3 Rate	0	Tax 3	1001	Tax4 Rate	0	Tax 4	1001	Tax5 Rate	0	Tax 5	1001	Tax6 Rate	0	Tax 6	<ol style="list-style-type: none"> 2. Select space under the Rate column in line with the rate you want set. (Ex. The rate for Tax1 is selected in the image) <ul style="list-style-type: none"> • Up to six different tax rates can be configured. Different rates can be applied to different items.
StoreID	Name	Rate	Description																										
1001	Tax1 Rate	0	Tax 1																										
1001	Tax2 Rate	0	Tax 2																										
1001	Tax3 Rate	0	Tax 3																										
1001	Tax4 Rate	0	Tax 4																										
1001	Tax5 Rate	0	Tax 5																										
1001	Tax6 Rate	0	Tax 6																										
<table border="1"> <thead> <tr> <th>StoreID</th> <th>Name</th> <th>Rate</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>1001</td> <td>Tax1 Rate</td> <td>7.5</td> <td>State Sales Tax</td> </tr> <tr> <td>1001</td> <td>Tax2 Rate</td> <td>0</td> <td>Tax 2</td> </tr> <tr> <td>1001</td> <td>Tax3 Rate</td> <td>0</td> <td>Tax 3</td> </tr> <tr> <td>1001</td> <td>Tax4 Rate</td> <td>0</td> <td>Tax 4</td> </tr> <tr> <td>1001</td> <td>Tax5 Rate</td> <td>0</td> <td>Tax 5</td> </tr> <tr> <td>1001</td> <td>Tax6 Rate</td> <td>0</td> <td>Tax 6</td> </tr> </tbody> </table>	StoreID	Name	Rate	Description	1001	Tax1 Rate	7.5	State Sales Tax	1001	Tax2 Rate	0	Tax 2	1001	Tax3 Rate	0	Tax 3	1001	Tax4 Rate	0	Tax 4	1001	Tax5 Rate	0	Tax 5	1001	Tax6 Rate	0	Tax 6	<ol style="list-style-type: none"> 3. To change the Tax rate name enter double-click the field under the Description column in line with the Tax # Rate row. When it is highlighted in blue, type the new description of the tax rate. <ul style="list-style-type: none"> • If your items will have Tax1 and Tax2 applied to them, by default the two tax rates will be added together then calculated on the total. <ol style="list-style-type: none"> 4. Repeat steps 2 & 3 for each rate you need to set.
StoreID	Name	Rate	Description																										
1001	Tax1 Rate	7.5	State Sales Tax																										
1001	Tax2 Rate	0	Tax 2																										
1001	Tax3 Rate	0	Tax 3																										
1001	Tax4 Rate	0	Tax 4																										
1001	Tax5 Rate	0	Tax 5																										
1001	Tax6 Rate	0	Tax 6																										

Set Tax Rate

Default Tax Rate	Area Tax Rates																												
	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 15%;">StoreID</th> <th style="width: 35%;">Name</th> <th style="width: 10%;">Rate</th> <th style="width: 40%;">Description</th> </tr> </thead> <tbody> <tr> <td>1001</td> <td>Tax1 Rate</td> <td>7</td> <td>Tax</td> </tr> <tr> <td>▶ 1001</td> <td>Tax2 Rate</td> <td>2</td> <td>Tax 2</td> </tr> <tr> <td>1001</td> <td>Tax3 Rate</td> <td>3</td> <td>Tax 3</td> </tr> <tr> <td>1001</td> <td>Tax4 Rate</td> <td>4</td> <td>Tax 4</td> </tr> <tr> <td>1001</td> <td>Tax5 Rate</td> <td>5</td> <td>Tax 5</td> </tr> <tr> <td>1001</td> <td>Tax6 Rate</td> <td>6</td> <td>Tax 6</td> </tr> </tbody> </table>	StoreID	Name	Rate	Description	1001	Tax1 Rate	7	Tax	▶ 1001	Tax2 Rate	2	Tax 2	1001	Tax3 Rate	3	Tax 3	1001	Tax4 Rate	4	Tax 4	1001	Tax5 Rate	5	Tax 5	1001	Tax6 Rate	6	Tax 6
StoreID	Name	Rate	Description																										
1001	Tax1 Rate	7	Tax																										
▶ 1001	Tax2 Rate	2	Tax 2																										
1001	Tax3 Rate	3	Tax 3																										
1001	Tax4 Rate	4	Tax 4																										
1001	Tax5 Rate	5	Tax 5																										
1001	Tax6 Rate	6	Tax 6																										
	<input type="checkbox"/> Tax 2 On Tax 1 Tax 2 Threshold <input style="width: 50px;" type="text" value="0"/>																												

5.

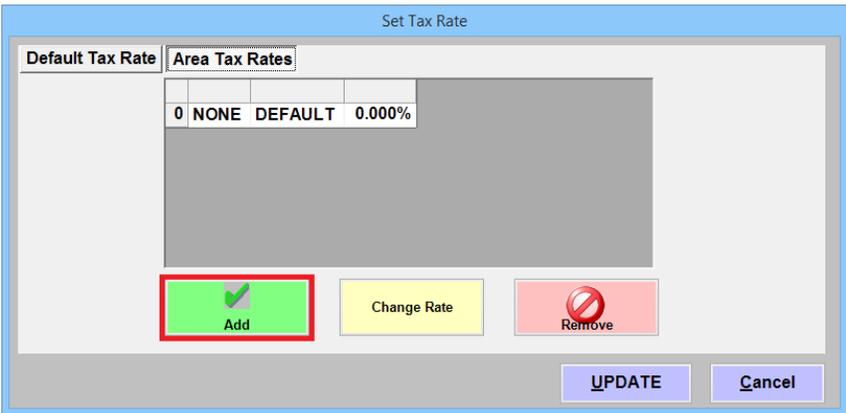
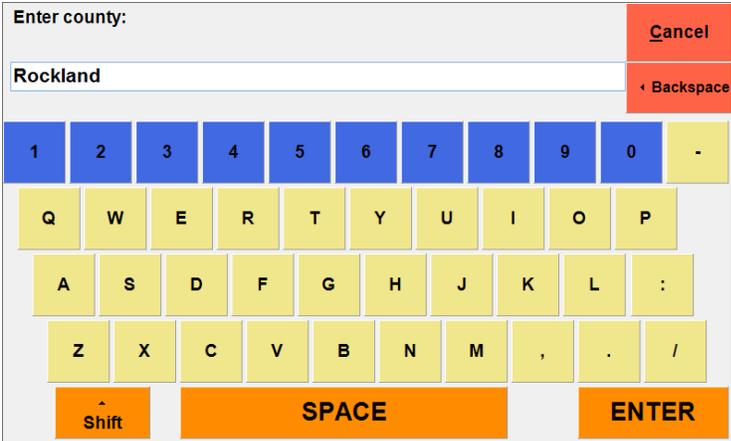
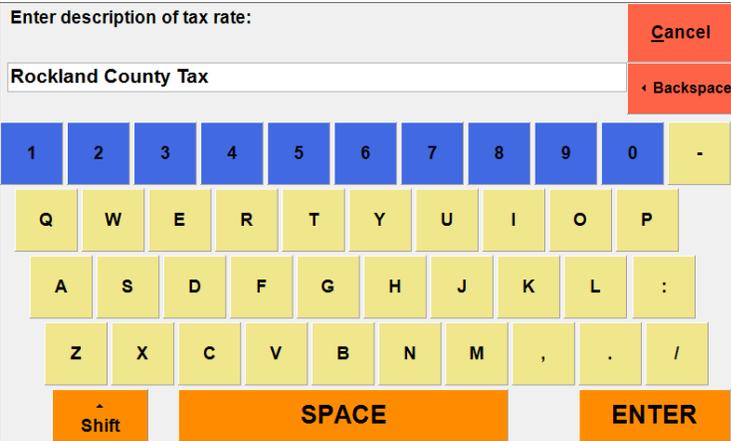
- For Tax 2, By checking **Tax2 On Tax1** the Tax1 rate will be calculated and then added to the invoice, the Tax2 rate will then be calculated to the grand total (total of invoice + Tax1).

- Tax2 Threshold - Is used in conjunction with Item Properties, when configuring Canadian tax rates. For more information on configuring Canadian Tax Rates please see below:
<http://faq.pcamerica.com/software/inventory/canadian-tax-rates>

5. Select **UPDATE**.

Configuring area tax rates

To set up area tax rates, select **Manager** from the login screen, provide the requested credentials, follow step 1 from the above section, and then follow these steps.

 <p>Set Tax Rate</p> <p>Default Tax Rate Area Tax Rates</p> <table border="1"><tr><td>0</td><td>NONE</td><td>DEFAULT</td><td>0.000%</td></tr></table> <p>Buttons: Add (highlighted), Change Rate, Remove, UPDATE, Cancel</p>	0	NONE	DEFAULT	0.000%	<ol style="list-style-type: none">1. Select the Area Tax Rates tab.2. Select Add.
0	NONE	DEFAULT	0.000%		
 <p>Enter county:</p> <p>Rockland</p> <p>Buttons: Cancel, Backspace, numeric keypad, QWERTY keyboard, Shift, SPACE, ENTER</p>	<ol style="list-style-type: none">3. Enter a county and select ENTER.				
 <p>Enter description of tax rate:</p> <p>Rockland County Tax</p> <p>Buttons: Cancel, Backspace, numeric keypad, QWERTY keyboard, Shift, SPACE, ENTER</p>	<ol style="list-style-type: none">4. Enter a description and select ENTER.				

Enter percentage

8.275

7	8	9
4	5	6
1	2	3
.	0	+/-

Clear Cancel

OK

5. Enter a percentage and select **OK**.

Set Tax Rate

Default Tax Rate	Area Tax Rates		
	0 NONE	DEFAULT	0.000%
	1 Rockland	Rockland County Tax	8.275%

Add Change Rate Remove

UPDATE Cancel

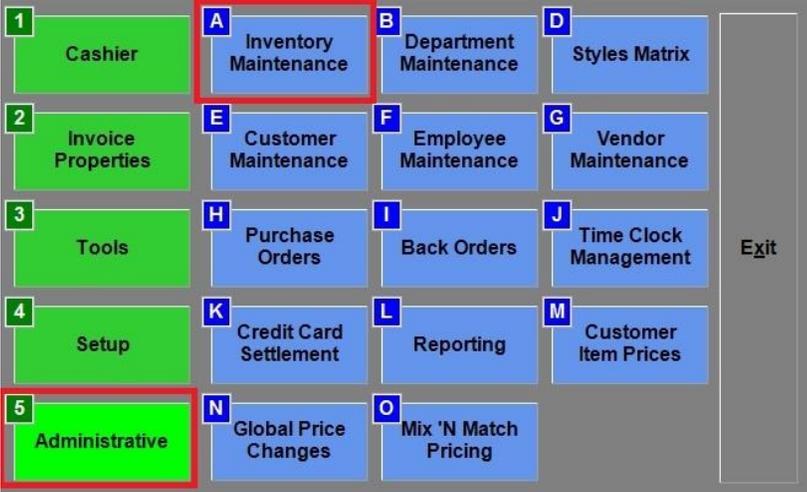
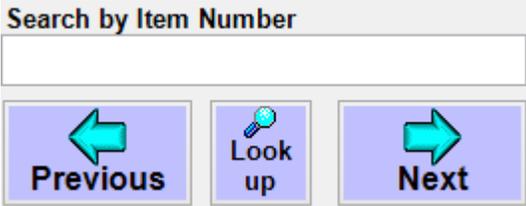
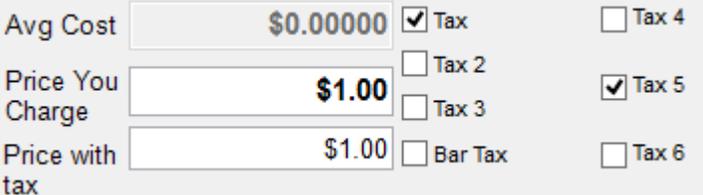
6. You will see the new tax rate below the default tax rate.

UPDATE

7. Select **UPDATE**.

Assigning different default tax rates to different items

To assign different tax rates to different items, select **Manager** from the login screen, provide the requested credentials, and then follow these steps.

 <p>The screenshot shows a grid of menu options. On the left, five green boxes are numbered 1 through 5. Box 5, labeled 'Administrative', is highlighted with a red border. In the top row, a blue box labeled 'Inventory Maintenance' with a blue 'A' in a square is also highlighted with a red border. Other menu options include Cashier, Invoice Properties, Tools, Setup, Department Maintenance, Employee Maintenance, Back Orders, Reporting, Global Price Changes, Mix 'N Match Pricing, Styles Matrix, Vendor Maintenance, Time Clock Management, and Customer Item Prices. An 'Exit' button is on the right.</p>	<ol style="list-style-type: none">1. Select Administrative [5] followed by Inventory Maintenance [A].
 <p>The screenshot shows a search interface. At the top is a text input field labeled 'Search by Item Number'. Below it are three buttons: 'Previous' with a left-pointing arrow, 'Look up' with a magnifying glass icon, and 'Next' with a right-pointing arrow.</p>	<ol style="list-style-type: none">2. Search for the desired item with the Search by Item Number field, Next or Previous buttons or Lookup Button
 <p>The screenshot shows a form for selecting tax rates. It has three rows of input fields and checkboxes. The first row shows 'Avg Cost' as '\$0.00000' with a checked 'Tax' checkbox and an unchecked 'Tax 4' checkbox. The second row shows 'Price You Charge' as '\$1.00' with unchecked 'Tax 2' and 'Tax 3' checkboxes, and a checked 'Tax 5' checkbox. The third row shows 'Price with tax' as '\$1.00' with unchecked 'Bar Tax' and 'Tax 6' checkboxes.</p>	<ol style="list-style-type: none">3. Put a check in the corresponding tax rates that you would be applied to the price you charge amount.

Avg Cost	<input type="text" value="\$0.00000"/>	<input checked="" type="checkbox"/> Tax	<input type="checkbox"/> Tax 4
Price You Charge	<input type="text" value="\$1.00"/>	<input type="checkbox"/> Tax 2	<input checked="" type="checkbox"/> Tax 5
Price with tax	<input type="text" value="\$1.12"/>	<input type="checkbox"/> Tax 3	<input type="checkbox"/> Tax 6
		<input type="checkbox"/> Bar Tax	

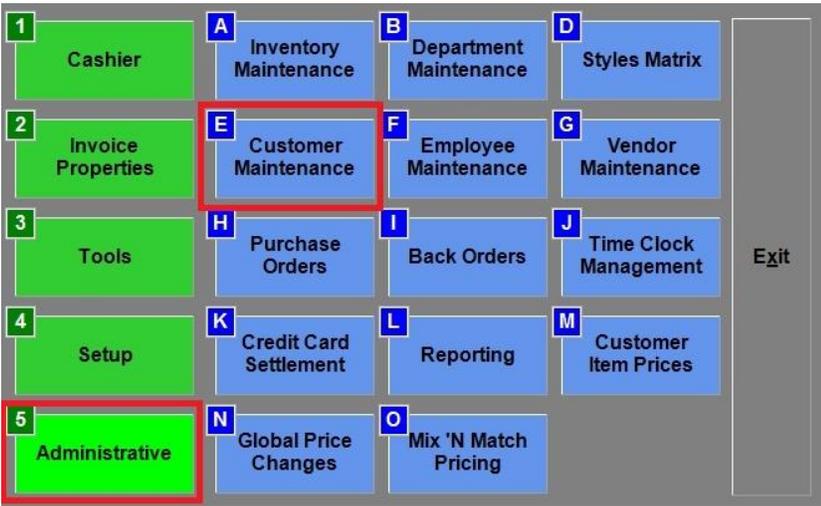
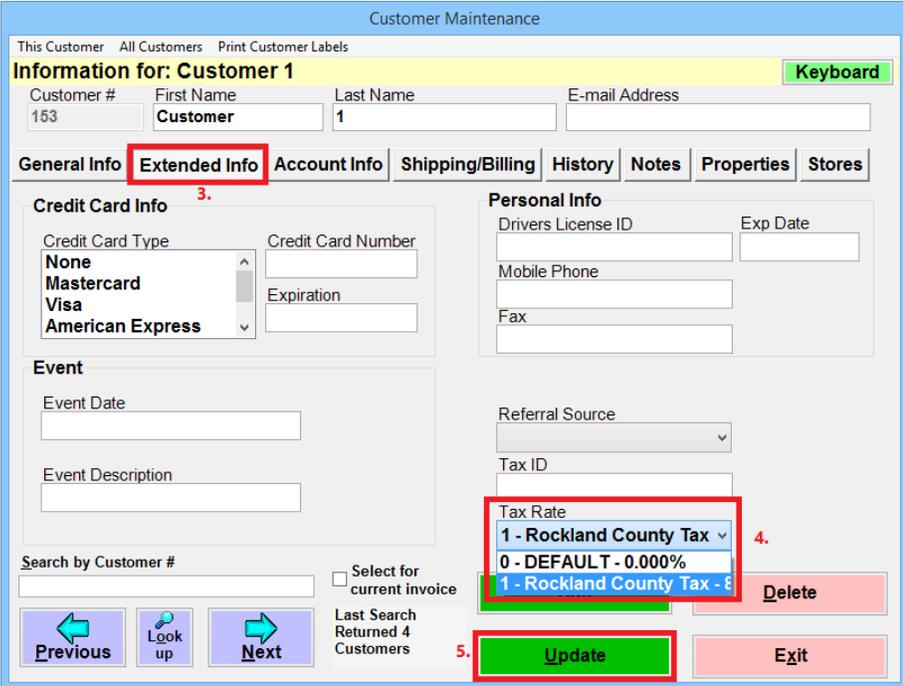
4. Select the **Price with tax field** to update it

Save

5. Select **Save**.

Assigning an area tax rate to a customer

Area tax rates can only apply to specific customers. To do so, select **Manager** from the login screen, provide the requested credentials, and then follow these steps.

 <p>The screenshot shows a main menu with various options. A red box highlights the 'Customer Maintenance' option (labeled 'E'). Another red box highlights the 'Administrative' option (labeled '5'). Other options include Cashier, Invoice Properties, Tools, Setup, Inventory Maintenance, Department Maintenance, Styles Matrix, Employee Maintenance, Vendor Maintenance, Purchase Orders, Back Orders, Time Clock Management, Credit Card Settlement, Reporting, Customer Item Prices, Global Price Changes, and Mix 'N Match Pricing. An 'Exit' button is on the right.</p>	<ol style="list-style-type: none">1. Select Customer Maintenance.
 <p>The screenshot shows the 'Customer Maintenance' form for 'Customer 1'. The 'Extended Info' tab is selected and highlighted with a red box (labeled '3.'). The 'Tax Rate' dropdown menu is open, showing '1 - Rockland County Tax' selected (labeled '4.'). The 'Update' button is highlighted with a red box (labeled '5.'). Other fields include Customer # (153), First Name (Customer), Last Name (1), E-mail Address, Credit Card Info, Personal Info, and Event details.</p>	<ol style="list-style-type: none">2. Select a customer.3. Select the Extended Info tab.4. Select a Tax Rate.5. Select Update.

Using the Area tax Rate

You must select the customer with the assigned area tax rate before completing the sale in order to have the area tax rate applied to the invoice.



1. From the invoice screen, select **Find** or **Quick Find**.

Select Customer

Customer#	First Name	Last Name	Address	Company
101	Cash	Customer		
123456789	Valued	Customer 1	2.	
153	Customer	1		
154	Customer	2	Street ADDRESS FIELD	Company NAME

Type customer #, last name, company, phone #

Change Sort Order: [] BackSpace Add Customer Edit Customer Scroll Up Scroll Down Search Exit Select

If **Find** was selected:

2. Click the customer with the assigned area tax rate from the list to highlight them in blue.
3. Click **Select**

If **Quick Find** was selected:

2. Enter the **exact** Customer number in the search field
3. Select **Enter**

Scan, type, or swipe the customer number and press enter:

2.

153

Cancel Backspace

1 2 3 4 5 6 7 8 9 0 -

Q W E R T Y U I O P

A S D F G H J K L :

Z X C V B N M , . /

Shift SPACE 3. ENTER



Customer Info **Customer Notes**

153 -- Customer 1

Area Tax Rate: Rockland @ 8.275%
Bonus Points: 10

4. Now that the customer is associated with the invoice, you will see the Area tax rate applied to the customer, this rate will be applied to all items on the invoice.

Tax Rate Identifier Symbols

Symbols are used to help you know which tax rates are being applied to the item on the invoice screen. These symbols appears on the Retail invoice screen, restaurant invoice screen, and the receipt for the customer. The symbols appears as the following:

Tax Rate 1 is * Tax Rate 2 is # Tax Rate 3 is ^ Tax Rate 4 is : Tax Rate 5 is - Tax Rate 6 is ~

Here is an example of an item added to the invoice in the Retail screen with all of the taxes enabled

	#	Item Info
▶	1	00702 @ \$74.95 MILLER LT HALF BBL*#^:~

Here is an example of how they appear on a receipt:

Corner Liquor
POS for your Liquor Store

INVOICE# 1
Closed to Cash Purchase
DATE/TIME: 6/12/2017 12:55:05 PM
CASHIER: 100101
STATION: 01

Item Count: 1
=====

1 MILLER LT HALF BBL*#^:~ \$74.95
=====

Subtotal	\$74.95
Tax1	\$5.25
Tax 2	\$1.87
Tax 3	\$0.75
Tax 4	\$3.75
Tax 5	\$6.00
Tax 6	\$4.50
GRAND TOTAL	\$97.07

Cash	\$97.07
Amt Tendered	\$97.07
Change	\$0.00

x

Thank you for visiting