

Sage CRM

Sage CRM 2016 R1 Tax Add-On Guide

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Chapter 1: About This Guide

This guide is for Cloud Users and System Administrators, who want to install and work with the Sage CRM Tax Add-on.

The Tax add-on adds a new "Tax Rate" field to the Quotes and Order screens. Once the rate is set, this field can be used to calculate the VAT amount for all line items added to a quote or an order.

We assume that:

- Users are familiar with Sage CRM.
- System Administrators are fully conversant with the User Guide and System Administrator Guide.

Chapter Summary

The table below gives a summary of each chapter.

Chapter	Summary
Setting Up the Tax Add-On (page 2-1)	How to install and uninstall the Tax Add-On.
Working with the Tax Add-On (page 3-1)	How to work with the Tax Add-On from the Quotes and Orders contexts.

Terms & Conditions and Licensing information

By installing this component (add-on) you understand and agree that we will use technology to track your usage of this application (on an anonymous basis). You also agree that we may contact you for the purpose of gathering your feedback on this component. For more information please read our privacy policy (<https://www.sagecrm.com/ireland/privacypolicy/>)

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Chapter 2: Setting Up the Tax Add-On

In this chapter you will learn how to:

- [Install the Tax Add-On.](#)
- [Uninstall the Tax Add-On.](#)

Installing the Tax Add-On

1. Click **My Profile | Administration | Add-ons.**
2. Click **Install** on the Tax panel.

When the add-on is installed, **Install** changes to **Uninstall**.

Uninstalling the Tax Add-On

1. Click **<My Profile> | Administration | Add-ons.**
2. Click **Uninstall** on the Tax panel.

When the add-on is uninstalled, **Uninstall** changes to **Install**.

Chapter 3: Working with the Tax Add-On

In this chapter you will learn how to:

- Use the Tax Add-On
- Set a Default Tax Rate Value
- Modify the Tax Value for a particular quote or order

Using the Tax Add-On

The Tax Add-On adds a new **Tax rate** field to the Quote and Order screens. This field calculates the tax amount of your items automatically. This provides your quote and order screens with new fields that are calculated automatically:

- a total gross amount.
- a total tax amount.
- a total amount including tax.

By default, the tax rate value is set to 19.6% for both the Orders and Quotes screens. You can change this value in the context of a particular quote or order, or you can set a new default value.

Setting a Default Tax Rate Value

The tax rate is configured separately for both quotes and orders. The tax rate value must be in numeric format and the decimal mark is a point (.). You can change 19.6 to 5.5 for example.

To set a new default tax rate value for quotes or for orders:

1. Click **<My Profile> | Administration | Customization | Primary Entities | Orders or Quotes**.
2. Click the **Fields** tab.
3. Click **Tax Rate**.
4. Change the Default amount and click **Save**.

Modifying the Tax Value for a particular quote or order

If you are not a System Administrator, and thus cannot change the default tax value, or if you just want to change this value for a particular quote or order, you can:

1. In the context of a new quote or order, change the tax rate value and **Save** or,
2. In the context of an existing order or quote, click **Change Summary** to change the value of the Tax Rate Field, then **Save**.

