



DYNAMIC VAT USER GUIDE

Version 2.0

Auto calculate VAT in opportunities,
quotes, orders and invoices in
Microsoft Dynamics 365

Developed By



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General VAT Rate Settings

We describe in this section how to add a default, write in and Parent Product VAT rate that will be applied to all Opportunity/Quote/Order/Invoice Products where the Product has no VAT rate defined.

To set these settings, follow the below steps:

- Go to **Settings, Solutions** and locate the **DynamicVAT** solution.

The screenshot shows the Dynamics 365 interface. At the top, there are navigation tabs for 'Dynamics 365', 'Settings', and 'Solutions'. Below the navigation, there is a section titled 'All Solutions' with a dropdown arrow. A toolbar contains several icons: 'New', 'Delete', 'Show Dependencies', 'Import', 'Export', 'Clone a Patch', 'Clone Solution', and 'Apply Solution Upgrade'. Below the toolbar is a table with the following columns: 'Name', 'Display Name', 'Version', 'Installed On', 'Package T...', and 'Publisher'. The table contains one row for the 'DynamicVAT' solution, which is checked. The 'Display Name' is 'DynamicVAT', the 'Version' is '0.2.1', and the 'Installed On' date is '4/6/2018'. The 'Publisher' is 'Dynamic Objects'.

Name	Display Name	Version	Installed On	Package T...	Publisher
<input checked="" type="checkbox"/>	DynamicVAT	0.2.1	4/6/2018	Managed	Dynamic Objects

- Open the solution and go to **Configuration**.
 - Set the **Default VAT Rate (%)**: This rate applies at the level of the Opportunity/Quote/Order/Invoice Products when the **Product** selected does not have a rate specified, is not linked to a parent record nor belongs to a product Family.
 - Set **Enable for Write-In Products**: The Tax rate is enabled for **Write-In** products added at the level of Opportunity/Quote/Order/Invoice Products and the rate is calculated from the **Default VAT Rate (%)**.
 - Set **Enable Inheritance**: When set to **Yes**, and if the Product selected has no VAT Rate set, the solution will look to the Parent Product specified and uses the corresponding rate.

- Click the **Save** Button to save the changes.

VAT Profiles

Create and apply multiple VAT profiles to different products and customers.

This solution works well when you have multiple departments operating in multiple countries and you need to apply different VAT rates per area of operation, per product and per customer.

To create and apply a VAT Profile, please follow the below steps:

- Go to Settings Area and then click on "VAT Profiles".
- Click New to Create a new VAT profile and Name your VAT profile.

Microsoft Dynamics CRM | Settings | VAT Profiles | New VAT Profile

Apps for CRM | View CRM information on the go with apps for your phone, tablet, Outlook, and more! | Get Apps for CRM

SAVE | SAVE & CLOSE | NEW | FORM EDITOR

VAT PROFILE: INFORMATION

New VAT Profile

Name* **Germany**

Products

VAT Profile	Product	VAT Rate (%) ↑
To enable this content, create the record.		

- Go to Settings Area -> Product Catalog -> Families and Products.
- Search and open the related product record.
- Go to the VAT Rates section and create a new "Product VAT Rate".
- Choose the profile record you created and type the respective VAT rate.

 PRODUCT
Product: Sugar

Default Price List Primary Unit Currency Amount \$2.00

VAT

Default VAT Rate (%+) 11.0

VAT Rates

VAT Profile	Product	VAT Rate (%) ↑
Germany	Sugar	19.0

- Go to the "Account" or "Contact" entity

- Open the related record and in the "VAT" tab choose the related VAT profile
- Press "save" to save the record.



ACCOUNT

Account ☰

<p>Industry --</p> <p>SIC Code --</p> <p>Ownership --</p>	<p>Originating Lead 🔒 --</p> <p>Last Campaign Date 🔒 --</p> <p>Marketing Materials Send</p>
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Description

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CONTACT PREFERENCES

Contact Method	Any
Email	Allow
Bulk Email	Allow
Phone	Allow
Fax	Allow
Mail	Allow

◀
VAT

<p>Exempt From VAT No</p>	<p>VAT Profile * Germany</p>
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VAT Exemption

Exempting an Account

To exempt an Account, follow the below steps:

- Go to the **Account** entity and create or open the account record.
- On the **Account** form, locate the **VAT** tab and set the "Exempt From VAT" field to "Yes".

◀ VAT

Exempt From VAT Yes

- Click on the **Save** Button.

Exempting a Contact

To Exempt a Contact, follow the below steps:

- Go to the **Contact** entity and create or open the contact record.
- On the **Contact** form, locate the **VAT** tab and set the "**Exempt From VAT**" field to "**Yes**".

▲ VAT

Exempt From VAT	Yes
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- Click on the **Save** Button.

Applying VAT to Products

We describe in this section how to add a VAT rate to a Product or Product Family that will be applied to all Opportunity/Quote/Order/Invoice Products.

To apply the VAT Rate to a Product, please follow the below steps:

- Go to the **Products** entity and create or open the product record.
- On the product form, locate the VAT tab and set **VAT Rate (%)** field to the desired value between 0 and 100.
- Click on the **Save** button

▾ VAT

+ VAT Rate (%)	5.0
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Auto Calculate VAT

The VAT rate is calculated for each Opportunity Product, Quote Product, Order Product and Invoice Product if applicable.

Note: The user can change or remove the calculated tax from write-in products manually if he chooses to.

The below steps show how to use VAT with Opportunity Products, the same can be applied to Quote/Order/Invoice Products.

- Go to **Sales** and then **Opportunities** and create or open the opportunity record.

The screenshot shows the Dynamics 365 user interface. At the top, the navigation bar includes 'Dynamics 365', 'Sales', and 'Opportunities'. Below this, a toolbar contains various actions like '+ NEW', 'DELETE', 'EMAIL A LINK', 'RUN REPORT', 'EXCEL TEMPLATES', 'EXPORT TO EXCEL', 'IMPORT DATA', 'CHART PANE', and 'VIEW'. The main content area displays 'My Open Opportunities' with a table header. The table header includes columns for 'Topic', 'Potential Cust...', 'Est. Close Date', 'Est. Revenue', 'Contact', 'Account', 'Probability', 'Rating', and 'Email (Potential Custo...)'.

- Fill in the details needed such as the **Potential Customer** (Account or Contact), **Currency**, **Default Price List** and then go to the **Product Line Items** Tab.

Product Line Items

Price List	Annual Price List
Revenue	System Calculated

Product Name	Properti...	Unit	Price Per Unit	Quantity	Discount	Extended Amount
<div style="display: flex; justify-content: space-between; align-items: center;"> ↓ ↑ + </div> <div style="border: 1px solid gray; padding: 5px; margin-top: 5px;"> Existing Product Write-in Product </div>						

To add an **Existing** Product, Click the + sign and select **Existing Product**. Under **Product Name**, select the product you want. Click the **Save** Button and the Tax rate is automatically calculated as per the configuration set.

OPPORTUNITY PRODUCT : OPPORTUNITYPRODUCT

Existing Product

General

Select Product Existing
 Existing Product* Existing Product

Write-In Product --
 Unit* Primary Unit

Pricing

Pricing	Use Default
Price Per Unit	\$400.00
Volume Discount	\$0.00
Quantity*	1.00
Amount	\$400.00
Manual Discount	\$0.00
Tax	\$44.00
Extended Amount	\$444.00

For **Write-In** products, Click the + sign and select **Write-In Product**. Under the **Product Name**, enter the product name, enter the **Quantity** and **Price Per Unit**. Click the **Save** Button and the Tax rate is automatically calculated as per the configuration set.

OPPORTUNITY PRODUCT : OPPORTUNITYPRODUCT

Write-In Product

General

Select Product  **Write-In**
Existing Product  --

Write-In Product * **Write-In Product**
Unit  --

Pricing

Pricing  **Override Price**
Price Per Unit * **\$100.00**
Volume Discount  **\$0.00**
Quantity * **2.00000**
Amount  **\$200.00**
Manual Discount --
Tax **\$22.00**
Extended Amount  **\$222.00**