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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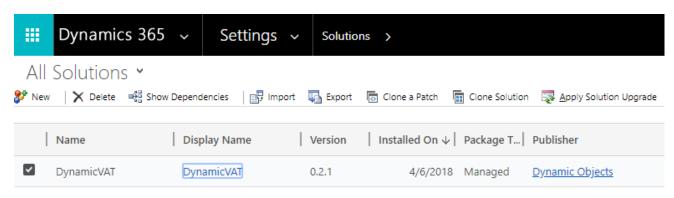
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General VAT Rate Settings

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.



- 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.

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PowerApps ~			
File	w Dependencies <u>物A</u> ctions -		
Solution: DynamicVAT			
You cannot directly edit the complete You cannot directly edit the	onents within a managed solution. If th	ne managed properties for solution components are set to allow customization, you can edit them in the Customizations area or from an	iother unmanaged :
Solution DynamicVAT State Information Configuration	Dynamic Objects		
Components Components Components Option Sets	Register Configuration		
Client Extensions Web Resources	Save		
₽ Processes ► +□ Plug-in Assemblies	Configuration		
Sdk Message Processing St Service Endpoints	Default VAT Rate (%)		
Dashboards Dialog Boxes	Enable for Write-In Products	No T	
Reports Connection Roles	Enable Inheritance	No	
Article Templates Contract Templates			
Email Templates			
Security Roles			
Field Security Profiles Provide Sets			
 Record Creation and Upda SLAs 			
🚍 Apps 🌄 Custom Controis			
Virtual Entity Data Providers			
Virtual Entity Data Sources 🐼 Mobile Offline Profiles			

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

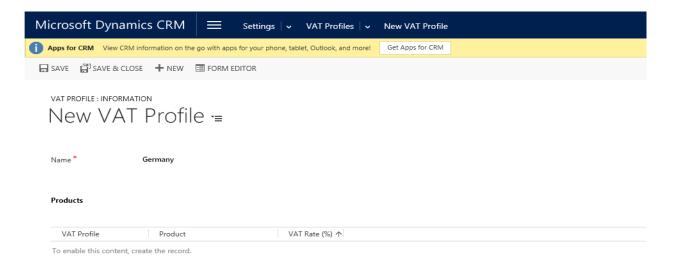
VAT Profiles

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.



- 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 Prod	uct: Suc	ar - ≡		
1			J CH _		
	Default Price List	Primary	Unit Currency	y Amount	\$2.00
4	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.

	ount =					
Industry		Originating Lead	⋒			
SIC Code Ownership		Last Campaign Date Marketing Materials	₽ Se	end		
Description		CONTACT PREFERENCE	CES			
		Contact Method	Ai	av.		
		Email		low		
		Bulk Email		low		
		Phone	AI	low		
		Fax	AI	low		
		Mail	AI	low		
▲ VAT						
Exempt From VAT	No				VAT Profile *	Germany

VAT Exemption

Exempting an Account

To exempt and 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

> 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

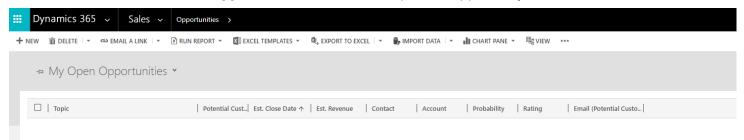
Auto Calculate VAT

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.



• 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					
					Ψ	↑ +
Product Name	Properti Unit	Price Per Unit	Quantity Discount	Extended Amount	Existing Product Write-in Product	

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.

5	ΊC	duct =	
eneral			
Select Product		Existing	Write-In Product 🔒
Existing Product *		Existing Product	Unit * Primary Un
Pricing			
Pricing		Jse Default	
Price Per Unit		\$400.00	
Volume Discount		50.00	
Quantity *		1.00	
		5400.00	
Amount		\$0.00	
Amount Manual Discount			

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 ·≡

\$22.00

\$222.00

▲ General

Tax

Select Product Existing Product	 Write-In 	Write-In Product Unit
existing roduce	-	one
Pricing		
Pricing	Override Price	
Price Per Unit *	\$100.00	
Volume Discount	\$0.00	
Quantity *	2.00000	
Amount	\$200.00	
Manual Discount		