

## Chapter 3

# CHAPTER 3 — CONFIGURING AND USING THE SALES COMPONENT

## Overview

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The Sales component of the CCH SureTax for Microsoft Dynamics 365 Business Central plug-in integrates with the Dynamics 365 Business Central Sales module. The Dynamics 365 Business Central Sales pages for which CCH SureTax can calculate tax are as follows:

- Quotes
- Orders
- Blanket Orders
- Return Orders
- Invoices
- Credit Memos

The first half of this chapter explains how to configure the options that impact the Sales component. The setup process includes setting defaults on some standard Dynamics 365 Business Central pages.

The second half of the chapter, titled Using the Sales Component, includes information about using CCH SureTax options when entering transactions into Microsoft Dynamics 365 Business Central. This section also describes how to view sales taxes prior to posting and how to post the sales tax transactions.

## Configuring the Sales Component

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### Configuring Sales Settings for a Company

The SureTax Sales Setup page allows you to configure CCH SureTax settings for the company that apply to the sales module.

To configure sales settings, do the following:

1. Search for and select the SureTax Sales Setup page.
2. Select the **General** tab and configure the following settings:
  - ◆ **Enable SureTax**. Enables the plug-in to calculate tax in the sales module.

- ◆ **Disable Automatic Tax Calculation.** Selecting this will reduce the number of tax calculation calls made to SureTax. Tax calculation will only be performed when explicitly called for.
  - ◆ **SKU Option.** Select whether to send the transaction type code or SKU to identify items.
3. Select the **Defaults** tab and configure the following settings:
    - ◆ **Default Regulatory Code.** Enter the default regulatory code to be used on sales transactions.
    - ◆ **Default Sales Type Code.** Enter the default sales type code to be used on sales transactions.
    - ◆ **Default Tax Situs Rule.** Enter the default tax situs rule to be used on sales transactions.
    - ◆ **Default Transaction Type Code.** Enter the default transaction type code to be used on sales transactions.
    - ◆ **Default Tax Exemption Code.** Enter the default tax exemption code to be used on sales transactions.

## Setting CCH SureTax Options for a Customer

CCH SureTax settings are added to the Dynamics 365 Business Central Customer page. Use the following procedure to override the CCH SureTax sales type code for specific Dynamics 365 Business Central customer accounts.

1. Open the customer page for the customer that you are modifying settings for.
2. Expand the **CCH SureTax** tab.
3. In the SureTax section, select options for the following field:
  - ◆ **SureTax Sales Type Code.** Your selection will override the default Sales type code selected on the SureTax Sales Setup page on transactions for this customer.
  - ◆ **SureTax Exemption Code.** Your selection will override the default exemption code selected on the SureTax Sales Setup page on transactions for this customer.
4. Close the customer page to save your changes.

## Setting CCH SureTax Options for Customer Ship-to Address

CCH SureTax settings are added to Dynamics 365 Business Central Customer Ship-to Addresses. Use the following procedure to set the CCH SureTax transaction type code for specific Dynamics 365 Business Central Customer Ship-to Addresses.

1. Select the Customer Ship-to Address that you are modifying settings for.
2. Select options for each of the following fields:
  - ◆ **SureTax Exemption Code.** Your selection will override the default exemption code selected on the SureTax Sales Setup page on transactions for this customer. This exemption code will override any exemption code selected for the customer when the ship-to code is specified on a transaction.
3. Close the Customer Ship-to Address page to save your changes.

## Setting CCH SureTax Options for Items

CCH SureTax settings are added to the Dynamics 365 Business Central items page. Use the following procedure to set the CCH SureTax transaction type code for specific Dynamics 365 Business Central items.

1. Open the Item page for the item that you are modifying settings for.
2. Expand the **CCH SureTax** tab.
3. Select options for each of the following fields:
  - ◆ **SureTax Transaction Type Code**. Your selection will override the default Transaction type code selected on the SureTax Sales Setup page on transactions for this item.
4. Close the Item page to save your changes.

## Setting CCH SureTax Options for G/L Accounts

CCH SureTax settings are added to the Dynamics 365 Business Central G/L Account page. Use the following procedure to set the CCH SureTax transaction type code for a specific Dynamics 365 Business Central G/L account.

1. Open the G/L account that you are modifying settings for.
2. Expand the **CCH SureTax** tab.
3. Select options for each of the following fields:
  - ◆ **SureTax Transaction Type Code**. Your selection will override the default Transaction type code selected on the SureTax Sales Setup page on transactions for this G/L account.
4. Close the G/L Account page to save your changes.

## Setting CCH SureTax Options for Resources

CCH SureTax settings are added to the Dynamics 365 Business Central Resources page. Use the following procedure to set the CCH SureTax transaction type code for a specific Dynamics 365 Business Central Resource.

1. Open the Resource that you are modifying settings for.
2. Expand the **CCH SureTax** tab.
3. Select options for each of the following fields:
  - ◆ **SureTax Transaction Type Code**. Your selection will override the default Transaction type code selected on the SureTax Sales Setup page on transactions for this Resource.
4. Close the Resource page to save your changes.

## Setting CCH SureTax Options for Fixed Assets

CCH SureTax settings are added to the Dynamics 365 Business Central Fixed Assets page. Use the following procedure to set the CCH SureTax transaction type code for a specific Dynamics 365 Business Central Fixed Asset.

1. Open the Fixed Asset that you are modifying settings for.
2. Expand the **CCH SureTax** tab.

3. Select options for each of the following fields:
  - ◆ **SureTax Transaction Type Code**. Your selection will override the default Transaction type code selected on the SureTax Sales Setup page on transactions for this Fixed Asset.
4. Close the Fixed Asset page to save your changes.

## Setting CCH SureTax Options for Item Charges

CCH SureTax settings are added to Dynamics 365 Business Central Item Charges. Use the following procedure to set the CCH SureTax transaction type code for specific Dynamics 365 Business Central Item charge.

1. Select the Item Charge that you are modifying settings for.
2. Select options for each of the following fields:
  - ◆ **SureTax Transaction Type Code**. Your selection will override the default Transaction type code selected on the SureTax Sales Setup page on transactions for this Item Charge.
3. Close the Item Charge page to save your changes.

## Setting CCH SureTax Options for Item Categories

CCH SureTax settings are added to Dynamics 365 Business Central Item Categories. Use the following procedure to set the CCH SureTax transaction type code for specific Dynamics 365 Business Central Item categories.

1. Select the Item Category that you are modifying settings for.
2. Select options for each of the following fields:
  - ◆ **SureTax Transaction Type Code**. Your selection will override the default Transaction type code selected on the SureTax Sales Setup page on transactions for this Item Category. If a transaction type code is assigned to both an item and the item category for that item, then the transaction type code for the item is used.
3. Close the Item Category page to save your changes.

## Setting CCH SureTax Options for Resource Groups

CCH SureTax settings are added to Dynamics 365 Business Central Resource Groups. Use the following procedure to set the CCH SureTax transaction type code for specific Dynamics 365 Business Central Resource groups.

1. Select the Resource Group that you are modifying settings for.
2. Select options for each of the following fields:
  - ◆ **SureTax Transaction Type Code**. Your selection will override the default Transaction type code selected on the SureTax Sales Setup page on transactions for this Item Category. If a transaction type code is assigned to both a resource and the resource group for that resource, then the transaction type code for the resource is used.
3. Close the Resource Group page to save your changes.

## Using the CCH SureTax Features on Individual Sales Documents

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When you create a sales document, the system applies the CCH SureTax settings that are selected on the page of the item type, customer, and SureTax Sales Setup page to the new document.

### Setting CCH SureTax Settings for Sales Transaction Lines

The CCH SureTax plugin allows you to override CCH SureTax settings at the line level on Sales transactions. Do the following to configure CCH SureTax settings for individual lines on a Sales transaction.

1. Select the transaction line for which to configure CCH SureTax settings.
2. Select the **Line** dropdown on the line items grid.
3. Select **SureTax Settings**.
4. Configure the desired CCH SureTax settings for the line.

### Viewing Sales Tax Details for Sales Documents


The CCH SureTax Tax Results page allows you to view detailed information about the sales tax for a document. To access this page, do the following:

1. Open the sales document for which you want to display tax details.
2. Select **Sales Tax Results**. The CCH SureTax Results page opens. This page shows tax information sent to and returned from CCH SureTax at an order, line, and detail level. The information on this page cannot be edited.
3. Do the following as needed to view tax details for a specific item:
  - a. Details for specific line items are displayed in the Line Information grid. Scroll to the left or right as necessary to view line information details.
  - b. To view tax details for a line item, select the line item and select **Manage > Tax Details**. The CCH Tax Details page will open and display detailed tax information for the line.
  - c. To view error messages for a line item, select the line item and select **Manage > Messages**. The CCH Tax Results Messages page will open and display any error messages for the line.
  - d. Select **Actions > View JSON** in order to view the JSON of the CCH SureTax Request.

### Calculating Tax for a Sales Document

Sales tax is calculated for a sale any time you perform one of the following tasks:

- Open the Dynamics 365 Business Central Statistics window for a sales document
- Open the CCH SureTax Tax Results window for a sales document
- Print a sales document
- Release a sales document
- Post an order, invoice, return order, or credit memo

 **Note:** If automatic tax calculation is enabled, tax will also be calculated whenever Dynamics 365 Business Central would typically calculate tax, such as when a line item quantity or amount is modified. Line discount is not supported when SureTax Tax Include Code is "Yes."

## Posting a Sales Document

When you post a sales order, return order, credit memo, or invoice, the plug-in finalizes the CCH SureTax transaction for the document.