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retail systems for a digital world

How-To Guide Configuring Tax (US)

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Introduction

The purpose of this guide is to show how to configure the Enactor Estate Manager and POS to calculate Tax correctly. This guide will use US sales tax as the model, but other tax regimes could be equally well supported with the appropriate configuration.

The Enactor Retail Application includes a configurable Tax Engine which is fully capable of supporting global estates. The native Tax configuration of Enactor Retail accommodates regional Taxation rules by defining Tax Schemes in which different Tax Rates may apply alternatively or in combination. To support US Tax, the following elements will be defined:

Overview

The following steps are required to configure US Tax:
- Tax Region Configuration
- Tax Scheme Configuration
- Tax Rate Configuration
- Tax Group Configuration
- Product Configuration
- Tax Group Tax Method Configuration
- Location/POS Terminal Configuration

Prerequisites

Resources

Before starting, you should have the following resources in place:
- Enactor Estate Manager
- Enactor POS (configured within the US Region, connected to the Estate Manager)
- Standard Configuration, including:
  - Base Configuration
  - US Retail (due to the complexity of US sales tax, one should assume that additional configuration will always be required even when using the US Retail configuration set)
- Examples of Data to be used as models, particularly product data

Prior Training/Experience

You should be familiar with the following:

- Estate Manager configuration
- Enactor configuration concepts, including Locations, POS Terminals, Products etc.
- Data broadcasting
- Standard POS Sales processes
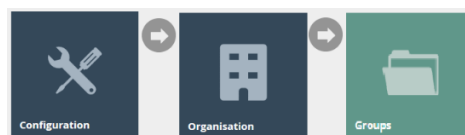
Configuration Steps

Tax Region

Tax Regions are hierarchical Groups of type Tax Region, which are closely integrated with the Regions hierarchy. Each Tax Region Hierarchy is associated with a Region. Regions are also Groups. To create or modify Groups of type *Tax Region*, access the Group Hierarchy Maintenance page and select the Tax Region Group Type. To create a new Hierarchy select *Create New Tax Region Hierarchy*. In the initial page of the Create option specify the Hierarchy ID and select a Region from the Regions dropdown list to associate it with then select *Create*.

Tax Region Configuration

The first step is to configure a Tax Region to which a Tax Scheme will be applied (a tax scheme is the container for all the tax rules applicable to a particular tax jurisdiction). Tax Regions allow us to manage tax rate and law changes in different jurisdictions. When dealing with US sales tax, there is typically a 1:1 relationship to Tax Schemes.

Tax Region is an example of a Group configuration, so it is accessed using Group Maintenance: *Configuration-Organisation-Groups.* Then select the Group Type of "Tax Region" from the drop-down.

A single Tax Region hierarchy is usually used for all regions. Click on the "Edit" ✎ icon by the existing "ALLREGIONS" hierarchy.

This will then display the regions within the hierarchy:

We will now add a new region under the "ALLREGIONS" top-level group.
Select ALLREGIONS (so it is bold) and then click on "Add Tax Region":

We will set the Group ID to "US" and the Name to "United States". Then Click Create.
The hierarchy then shows the new group in the list:

The steps above should be repeated until a region is fully built down to the jurisdiction level.
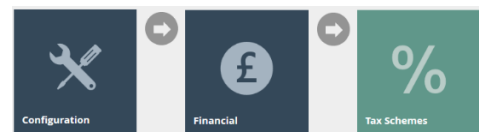As shown below:

This concludes the Tax Region configuration.

Tax Schemes

The Tax Scheme is an independent entity that is specifically associated only with a set of Tax Rates. Note that a Tax Rate should not be associated with multiple Tax Schemes unless it is intended that any change to the rate should be applicable to all the Tax Schemes.

Tax Scheme Configuration

The next step is to configure the Tax Scheme. The Tax Scheme is the "container" for all the configuration settings that relate to that scheme. Multiple tax schemes can be maintained in the same Enactor solution. A Tax Scheme will be created for each tax jurisdiction/Tax Region.

Go to Tax Scheme configuration using Search or the path *Configuration-Financial-Tax Schemes.*

The set of existing Tax Scheme will be shown:

Tax Scheme Maintenance

Tax Scheme ID	Starts With ▼		
▼ Apply Filters ⟳ Reset Filters			

		Tax Scheme ID	Description
👁 ✏ ⎘ 🗑		EXAMPLE1	Example Tax
👁 ✏ ⎘ 🗑		DE	Germany VAT

Click on "Create a New Tax Scheme". The Tax Scheme ID field is shown:

Tax Scheme Maintenance

Please enter following details for the new Tax Scheme

Tax Scheme ID	

← Back ➕ Create

For this example, we will create a Tax Scheme for the Atlanta, GA Tax Region. Enter a scheme ID that can be easily recognized. In this example, we're using USG_ATL.

You will then be presented with the tax scheme details page:

Set the values on the page as follows:

- Set the Description to "Atlanta, GA Tax".
- For this example, we are not using a Tax Calculation Service. This should be left blank (which means Enactor will calculate the tax itself).
- Enable Multiple Tax Rates Allowed.
- Prices do not include Tax, so that box should remain unchecked.
- Do not remove Tax on Sale.
- Manufacturer coupons are not relevant.

We will set the Applicable Tax Rates later. We have finished the Tax Scheme maintenance for now, so click on Save.

Tax Rates

Tax Rates are defined before and independently of **Tax Schemes**. They are named Tax Rate values, which may be independently associated with *Tax Schemes* when *Tax Schemes* are created or modified. Multiple *Tax Rates* may be associated with a *Tax Scheme* (**Note** however, that although Tax Rates are independent of Tax Schemes, they should not be associated with multiple *Tax Schemes* unless it is intended that a change to the *Tax Rate* value should affect all the associated *Tax Schemes*.).

Tax Rate Configuration Approach

When configuring tax rates for US retailers, there are multiple approaches that can be taken. Either approach will result in the correct tax being calculated and collected POS. The impact of the approach taken will be realized during initial setup as well as ongoing operations and maintenance. Tax Rates can either be setup generically (i.e. 4.0% State Sales Tax) or jurisdiction specific (i.e. 4.0% State Sales Tax- Georgia). Each method has its own pro's and con's:

When using generic Tax Rates, the number of rates that will need to be created for a retailer will be minimized. For example, there are 5 states in the US that have the same 4.0% state sales tax rate as Georgia. While not a huge savings in terms of data setup, the benefit can increase greatly at the county level where only very large or very dense chains operate

multiple locations within a single county. The use of generic Tax Rates may also streamline the setup of new locations where it will be more likely that the appropriate tax rate may already exist.

When using jurisdiction specific Tax Rates, while the number of distinct rate entries will increase, the level of effort to maintain those rates over time will decrease. For example, if the state of Georgia were to increase the state sales tax rate to 4.5%, it would only require a single change to update all jurisdictions within the state of Georgia. Using a generic Tax Rate would require that every jurisdiction within Georgia to be updated individually. Also, the ability to specify an effective date on a tax rate simplifies the coordination of updates and provides additional options when managing "tax free" holidays.

Determining the best approach for a retailer will be based on many factors including number of locations, number of jurisdictions and any tax rate integration capabilities available. Some integrations may only provide jurisdictions with appropriate rate level information where others may provide jurisdiction specific Tax Rates. The examples shown in this document utilize the generic approach to configuring Tax Rates, but the general concepts and approach is applicable for either method.
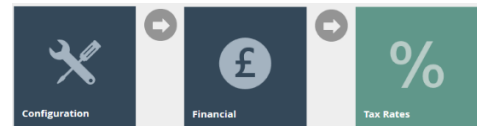
Tax Rate Configuration

Tax Rates are used for the various Percentage Rates of tax eligible to be applied within the scheme. This must include all possible rates for all products being sold within a jurisdiction. For example, in our Atlanta, GA location, we need to account for State, County, City and Other tax rates for fully taxed, reduced tax and tax-free merchandise:

Rate ID	Rate Name	Percentage	Applies To
ST_4.0	State Sales Tax 4.0%	4%	Most Products
CN_3.0	County Sales Tax 3.0%	3%	Most Products
CT_1.5	City Sales Tax 1.5%	1.5%	Most Products
OT_0.4	Other Sales Tax 0.4%	.4%	Most Products
ST_0.0	State Sales Tax 0.0%	0%	Grocery and state exempt items
CN_0.0	County Sales Tax 0.0%	0%	County exempt items
CT_0.0	City Sales Tax 0.0%	0%	City exempt items
OT_0.0	Other Sales Tax 0.0%	0%	Other exempt items

Eight rates will be required to support the Atlanta, GA location.

Go to Tax Rate configuration using Search or the path
Configuration-Financial-Tax Rates.

The list of currently configured Tax Rates is shown:

		Tax Rate ID	Tax Rate Type	Description	Effective Date
👁 ✏ 🗐 🗑		DE_VAT_RED	VAT	Germany Reduced VAT	01-Jan-2020
👁 ✏ 🗐 🗑		DE_VAT_STD	VAT	Germany Standard VAT	01-Jan-2020
👁 ✏ 🗐 🗑		DE_VAT_EXEMPT	VAT	Germany VAT Exempt	01-Jan-2020
👁 ✏ 🗐 🗑		FRPC	VAT	Perfume - Cosmetics	06-May-2014
👁 ✏ 🗐 🗑		FRR	VAT	Retail Tax (France)	11-Apr-2014

As you can see, each rate has an effective date. It is possible to set up one or more rates with the same ID with different effective dates. The application will use the applicable rate with the most recent past effective date.

Click on "Create a new Tax Rate".
The initial Tax Rate Maintenance screen is then shown:

The Tax Rate Type defines how the tax will be calculated. Use VAT for most jurisdictions where tax is calculated simply as a percentage of the selling price. For jurisdictions with more complex rules where the rate is be dependent on the value of the transaction, use Tax Value or Tax Percentage tables. Composite rates are used when multiple rates are applicable to each item. See Appendix A for more information on special Tax Rate entry methods.
As we are configuring basic, percentage-based taxes in this example, we will simply use the VAT type.

The Tax Rate ID can be any unique string. We will use ST_4.0 for the 4.0% State Sales Tax. Since the rate itself is generic, we will not specify an effective date.

The Tax Rate Maintenance details page is then shown:

Tax Rate Maintenance

Save   Cancel

You are editing Tax Rate : 'UKS' Tax Type 'VAT' with Effective Date '04/01/11'

General

Description*		English (UK) ▼
Display Tax Code*		English (UK) ▼
Percentage	0%	
Tax Authority	- ▼	
Fiscal Tax Rate Reference		

* Denotes Mandatory

Give the rate a meaningful description (e.g. State Sales Tax 4.0%).
The Display Tax Code will display on the POS receipt. Most US retailers choose to display the tax type as well as the percentage. A Display Tax Code of "4.0% State" would be appropriate.

Set the Percentage to 4%.
Tax Authority and Fiscal Reference are not relevant for US tax.

Then save the rate. Repeat for the other seven Atlanta, GA Rates. This will give you a set of eight rates applicable for Atlanta, GA.

Now the tax rates need to be assigned to the Tax Scheme. To do this, go to Tax Scheme Maintenance (*Configuration-Financial-Tax Schemes*) and edit the Atlanta, GA Scheme. Then click on the "Applicable Tax Rates" tab:

Tax Scheme Maintenance   ? ‖ ✕

Save   Cancel

You are editing Tax Scheme ID: 'USG_ATL'

General   Applicable Tax Rates

This shows the Tax Rates which are allowed for this Tax Scheme.

	Tax Rate ID	Description	Percentage
-	-	-	-
➕ Add		County Sales Tax 0.0% ▼	

You can now add each of the three rates to the scheme. Select the rate from the drop-down and click on Add.
You will finish up with eight rates on the scheme:

Then save the Tax Scheme.

This concludes the Tax Rates maintenance.

Tax Groups

Tax Groups are defined with a Tax Group ID and Description and serve simply as an identifiable anchor with which Products may be associated and thereby collectively referenced for purposes of associating them with a *Tax Scheme* either universally or regionally (*via TaxGroupTaxMethod*). *Note* that Tax Groups are not hierarchical and are not defined using the *Groups* infrastructure. An individual Product may be specifically assigned to a *Tax Group* either universally (at Product level) or regionally, by specifying a list of *Tax Region-Tax Group* assignments for the Product. Alternatively (or additionally) a Merchandise Management Group (MM Group) may be assigned to a *Tax Group*, also either universally (at MM Group level) or regionally, by specifying a list of *Tax Region-Tax Group* assignments for the MM Group. If an individual Product should happen to be associated with a *Tax Group* by both routes the specific Product assignment takes precedence.
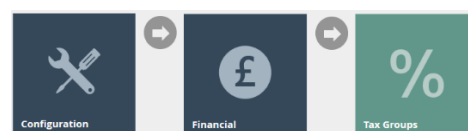
Tax Group Configuration

Tax Groups identify the categories of product that may attract different levels of tax. In the US, this can be very complex as qualification as well as benefits can vary by jurisdiction. For example, in the state of Ohio, all grocery items are tax exempt at all levels but in Georgia, grocery items are tax exempt at the state level but may still be taxed at the county and city level. The retailer will be very familiar with how and where their products can be impacted. For the purpose of this example, we will use the following categories which are commonly affected by various tax rate reductions:

- General Merchandise
- Grocery
- Clothing
- Services

For this example, we will set up tax groups comprising:

Tax Group ID	Tax Group Name	Atlanta, GA Tax Rate
Clothing	C	8.9%- ST, CN, CT, OT
Grocery	G	4.9%- CN, CT, OT
General Merchandise	M	8.9%- ST, CN, CT, OT
Services	S	8.9%- ST, CN, CT, OT

Navigate to the tax groups maintenance app using search or the menu path *Configuration-Financial-Tax Groups.* Please note Tax Groups is a specific maintenance utility. It is not the same as the Groups maintenance utility.

For each group required, click on "Create a new Tax Group".

The enter the ID and click "Create".

The only required data for the group is the description.
The External Tax Group field is for mapping to a 3rd party system if required.

Enter the description and save.
Then repeat for the other groups:

This concludes the Tax Group configuration.

Product Configuration

Now that we have created the tax groups, we need to assign them to the relevant products.
Note: this will normally be carried out externally to Enactor, using the system of record for product data (usually an ERP or PIM), and then imported via an integration process. We will configure products manually within Enactor as examples:

Go to Product Maintenance (*Configuration-Merchandise-Products*) and edit an example product:

Click on the "Tax" tab:

The first two checkboxes are not relevant for this example. The key entry is the "Tax Group" dropdown. This should be set to the appropriate tax group for the product (as this is yoghurt, I will choose the Food Tax Group).
The table at the bottom is used when there are multiple tax regions in the organisation, and the tax group for this product is different in various regions. This is an additional complexity that should be avoided wherever possible, but if necessary it can be used to set an alternative tax group to the product for specific tax region(s).

Once the tax group is assigned to the product, save it. Amend any other example products you wish to use.
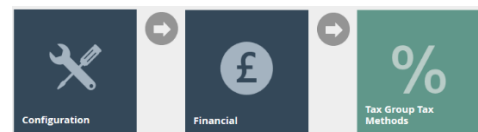
Tax Group Tax Methods

Tax Group Tax Methods are defined to associate a *Tax Group*, *Tax Scheme* and *Tax Region* with a specific individual or set of Tax Rates derived from those associated with the Tax Scheme. They may be defined, after all required instances of the above elements are defined.

Tax Group Tax Method Configuration

Now that we have maintained Tax Regions, Schemes, Rates and Groups, we need to bring them all together so that the application can apply the rules in the right way. To do this, we use the Tax Group Tax Method mapping configuration.

Go to the Tax Group Tax Method maintenance utility using search or the menu path *Configuration-Financial-Tax Group Tax Methods*.

Tax Group Tax Method Maintenance

		Tax Group	Tax Region	Tax Scheme	Description
👁 ✏ 🗐 🗑		Alcoholic Drinks	France	FR	France
👁 ✏ 🗐 🗑		Books & Magazines	Germany	Germany VAT	Germany Reduced VAT
👁 ✏ 🗐 🗑		General Food	Germany	Germany VAT	Germany Reduced VAT
👁 ✏ 🗐 🗑		Takeaway Hot Food	Germany	Germany VAT	Germany Reduced VAT
👁 ✏ 🗐 🗑		Health	Germany	Germany VAT	Germany Reduced VAT
👁 ✏ 🗐 🗑		Clothing	Germany	Germany VAT	Germany Standard VAT

First, we will filter the list to the Tax Region we are interested in (US- Atlanta, GA). Then we can create the set of mapping records for each Tax Group:
Click on "Create a new Tax Group Tax Method".

Select the appropriate values for each of the three dropdowns. Choose each Tax Group in turn. The Tax Region should be US-Atlanta, GA. The tax scheme should be Atlanta, GA Tax. Then click "Create".

Enter a description, e.g. "Grocery- Atlanta, GA".

Select and add the appropriate Tax Rates for the Tax Group. Since this example is for Grocery products in Atlanta, GA remember to select the 0.0% State Tax Rate (refer to table on page 11).

Then click Save:

Tax Group Tax Method Maintenance   ? ‖ ✕

💾 Save   ⊗ Cancel

You are editing the Tax Group Tax Method for Tax Group 'G', Tax Region 'USG_ATL', and Tax Scheme 'US_GA_ATL'

General

Description* | Grocery- Atlanta, GA | | English (UK) ▼ |

* Denotes Mandatory

	Tax Rate	
🗑	State Sales Tax 0.0%	
🗑	County Sales Tax 3.0%	
🗑	City Sales Tax 1.5%	
🗑	Other Sales Tax 0.40%	

Repeat for each of the Tax Groups in the region. Apply the appropriate rate for each group.

Tax Group Tax Method Maintenance   ? ‖ ✕

Hide

Tax Group	- ▼
Tax Region	US- Atlanta, GA ▼
Tax Scheme	Atlanta, GA Tax ▼

▼ Apply Filters   ↺ Reset Filters

	Tax Group	Tax Region	Tax Scheme	Description
👁 ✏ 🗗 🗑	Clothing	US- Atlanta, GA	Atlanta, GA Tax	Clothing- Atlanta, GA
👁 ✏ 🗗 🗑	Grocery	US- Atlanta, GA	Atlanta, GA Tax	Grocery- Atlanta, GA
👁 ✏ 🗗 🗑	General Merchandise	US- Atlanta, GA	Atlanta, GA Tax	Merchandise- Atlanta, GA
👁 ✏ 🗗 🗑	Services	US- Atlanta, GA	Atlanta, GA Tax	Services- Atlanta, GA

This concludes the configuration of Tax Group Tax Methods.

Location Configuration

The final configuration step is to apply the tax region and tax scheme to each applicable location. This tells the application what tax rules to apply at each store.

Go to the Location maintenance utility using search or the menu path *Configuration-Organisation-Locations*.

Edit the Atlanta, GA location and choose the General-Tax Tab:

Set the Tax Region to US- Atlanta, GA and the Tax Scheme to Atlanta, GA Tax.

This concludes the Location Configuration for tax.

POS Terminal Configuration

It is common, but not required, in the US for retailers to print a breakdown of the taxes collected on the receipt. To have the detailed information printed, select the Printing tab in POS Terminal Maintenance and then navigate to the Flags subtab. Select the option Print Tax Details on Receipt:

Note: it is also possible to configure the tax rules at POS Terminal level. This would normally only be used where there are "Special" POS Terminals within a store, which have non-standard tax rules or a terminal taken off-site to sell in a different jurisdiction. Generally, the tax settings on the POS Terminal would be left blank, which would cause the POS to fall back to the store location-level settings.

This concludes the POS Terminal Configuration for tax.

Broadcasting and Testing the Configuration

At this stage all the tax rules that have been configured should be broadcast to the applicable stores/devices. The "Retail Static Data" Predefined Broadcast configuration could be used for this.

Once all the rules have been broadcast, the till should be restarted to ensure it has applied the latest settings to all applicable entities.

Then transactions may be processed to confirm the configuration is working as expected.

If the POS is configured to display the Tax breakdown on the receipt (in the POS Terminals Printing-Flags configuration) this can be immediately checked.

If the tax breakdown is not required on the receipt, the XML Transaction basket may be reviewed to check the tax calculation details.

Appendix A- Alternative Tax Rate Configuration

While most taxing authorities in the US now rely on simple percentage calculations, some jurisdictions still make use of tax tables to enforce special rounding rules where others have chosen to implement variable rates and change the tax rate based on purchase.

As an example, the state of Florida uses a bracket system for calculating sales tax when the transactions fall below or in between whole dollar amounts. The state sales tax rate is 6% and allows an additional county tax of 0 – 2.5%. Below is the tax table provided for an 8% effective rate:

8% (Combined 6% General Sales Tax Rate Plus 2% Discretionary Sales Surtax Rate)											
Amount of Sale	Tax	Amount of Sale	Tax	Amount of Sale	Tax	Amount of Sale	Tax	Amount of Sale	Tax	Amount of Sale	Tax
.10 - .12	.01	2.10 - 2.12	.17	4.10 - 4.12	.33	6.10 - 6.12	.49	8.10 - 8.12	.65	10.10 - 10.12	.81
.13 - .25	.02	2.13 - 2.25	.18	4.13 - 4.25	.34	6.13 - 6.25	.50	8.13 - 8.25	.66	10.13 - 10.25	.82
.26 - .37	.03	2.26 - 2.37	.19	4.26 - 4.37	.35	6.26 - 6.37	.51	8.26 - 8.37	.67	10.26 - 10.37	.83
.38 - .50	.04	2.38 - 2.50	.20	4.38 - 4.50	.36	6.38 - 6.50	.52	8.38 - 8.50	.68	10.38 - 10.50	.84
.51 - .62	.05	2.51 - 2.62	.21	4.51 - 4.62	.37	6.51 - 6.62	.53	8.51 - 8.62	.69	10.51 - 10.62	.85
.63 - .75	.06	2.63 - 2.75	.22	4.63 - 4.75	.38	6.63 - 6.75	.54	8.63 - 8.75	.70	10.63 - 10.75	.86
.76 - .87	.07	2.76 - 2.87	.23	4.76 - 4.87	.39	6.76 - 6.87	.55	8.76 - 8.87	.71	10.76 - 10.87	.87
.88 - 1.09	.08	2.88 - 3.09	.24	4.88 - 5.09	.40	6.88 - 7.09	.56	8.88 - 9.09	.72	10.88 - 11.09	.88
1.10 - 1.12	.09	3.10 - 3.12	.25	5.10 - 5.12	.41	7.10 - 7.12	.57	9.10 - 9.12	.73	11.10 - 11.12	.89
1.13 - 1.25	.10	3.13 - 3.25	.26	5.13 - 5.25	.42	7.13 - 7.25	.58	9.13 - 9.25	.74	11.13 - 11.25	.90
1.26 - 1.37	.11	3.26 - 3.37	.27	5.26 - 5.37	.43	7.26 - 7.37	.59	9.26 - 9.37	.75	11.26 - 11.37	.91
1.38 - 1.50	.12	3.38 - 3.50	.28	5.38 - 5.50	.44	7.38 - 7.50	.60	9.38 - 9.50	.76	11.38 - 11.50	.92
1.51 - 1.62	.13	3.51 - 3.62	.29	5.51 - 5.62	.45	7.51 - 7.62	.61	9.51 - 9.62	.77	11.51 - 11.62	.93
1.63 - 1.75	.14	3.63 - 3.75	.30	5.63 - 5.75	.46	7.63 - 7.75	.62	9.63 - 9.75	.78	11.63 - 11.75	.94
1.76 - 1.87	.15	3.76 - 3.87	.31	5.76 - 5.87	.47	7.76 - 7.87	.63	9.76 - 9.87	.79	11.76 - 11.87	.95
1.88 - 2.09	.16	3.88 - 4.09	.32	5.88 - 6.09	.48	7.88 - 8.09	.64	9.88 - 10.09	.80	11.88 - 12.09	.96

To configure the Tax Rate represented by this table, create a new tax rate of the type Tax Value Table:

Enter the basic information on the General tab

Begin replicating the tax table on the Table Value Tab:

Notice that there is a pattern within the table and it essentially begins repeating after $1.09. To save entering the entire table, we can stop entering ranges at $1.09 and use the Repeat From feature on the $.10 - $.12 bracket.

In some jurisdictions, the tax rate changes based on the amount purchased. In the state of Rhode Island, no state sales tax is charged on the first $250.00 of clothing purchases. Purchase beyond $250.00 are subject to the standard 7% state Tax Rate. This can be configured using the Tax Percentage Table Tax Rate Type.

Create a new Tax Rate for Rhode Island with a type of Tax Percentage Table:

Enter the general Tax Rate information:

Enter the value ranges and associated tax percentages as shown below. By selecting Tax Percentage Applies to Range you are stipulating that the tax amount will be calculated based on range when the purchase amount spans multiple ranges. In our example, checking the box will mean that only the purchase amount exceeding $250.00 will be taxed at 7% (i.e. on a $265 purchase, $250 would be taxed at 0% and $15 would be taxed at 7%).

After special rates have been created as described above, they can be included into Tax Schemes and Tax Group Tax Methods just as the standard VAT type taxes described earlier.

About This Document

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The amendment history of this document can be found in the table below.

Current Document Version information

Document Context

This document is part of the Enactor Product Documentation Series. All Enactor products include a comprehensive documentation set designed to improve understanding of the product and facilitate ease of use.

Document Inquiries

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By Email: documentation@enactor.co.uk

Document History

The following versions of the document have been produced:

VERSION	STATUS	ISSUE DATE	AUTHOR	REASON FOR ISSUE
1.0	Initial Draft			Initial version