



# CUSTOMER SUPPORT FREQUENTLY ASKED QUESTIONS

## Changing Sales Tax Rates

Depending on the module(s) you use to make sales there could be one to three areas to correct. It does not hurt to change all three settings outlined below to keep your data current.

If you use the **Point of Sale Software** to make sales, you only have to change your divisional set up.

1. Login to your company using a level 9 password.
2. Go to the Oneir Solutions Master Menu.
3. Select 'I' for initialization.
4. Choose 'Update divisions'
5. Change the appropriate tax rate for the division(s) affected by the sales tax change.
6. When finished press and save the changes.
7. Point of Sale will now charge the new tax rates.

To keep your customer and product information current you may also want to change the existing data. The tax rates in both are normally only used for reference when you use Point of Sale, but there is no reason not to update the rate. Please see Sales Order section for changing the customer and inventory rates.

If you are using **Sales Order Software** to make sales, you have to change your divisional, customer, and product set up. The division will correct the tax rate default for any new customer/product added. The change to the product and customer will affect the tax change for sales.

### Changing the Divisional Setting

1. Login to your company using a level 9 password.
2. Go to the Oneir Solutions Master Menu.
3. Select 'I' for initialization.
4. Choose 'Update divisions'
5. Change the appropriate tax rate for the division(s) affected by the sales tax change.
6. When finished press and save the changes.
7. Proceed to "Changing the Product Tax Rate".

### Changing the Product Tax Rate

1. From the Oneir Solutions Master Menu, choose Inventory Management menu.

2. Go to the 'Inventory Management utilities menu'
3. Select 'Change Inventory default tax rates'
4. Select the division, product line, products, and vendor that the sales tax change applies to. (This selection process is exactly the same as if you were asking for a report. If you leave the field(s) blank the change will apply to all).
5. Enter the old sales tax rate. I.e. if the city/provincial rate used to be 7% enter 7 as the old rate.
6. Enter the new rate to replace it with. I.e. if the city/provincial rate is now 7.5% enter 7.5.
7. This will update all of the products belonging to the selected criteria that are currently set at the old rate to the new rate. It will not affect any products that are at a different rate than what is entered for the old rate. I.e. if a product is set up with a city/provincial rate of 6.5% it will not be changed if the old rate entered is specified as 7.
8. Proceed to "Changing the Customer Tax Rate"

### Changing the Customer Tax Rate

1. From the Oneir Solutions Master Menu, choose Accounts Receivable menu.
2. Go to the 'Accounts Receivable utilities menu'
3. Select 'Change customer default tax rates'
4. Select the customer range that the sales tax change applies to. (This selection process is exactly the same as if you were asking for a report. If you leave the field(s) blank the change will apply to all).
5. Enter the old sales tax rate. I.e. if the city/provincial rate used to be 7% enter 7 as the old rate.
6. Enter the new rate to replace it with. I.e. if the city/provincial rate is now 7.5% enter 7.5.
7. This will update all of the customers belonging to the selected range that are currently set at the old rate to the new rate. It will not affect any customers that are at a different rate than what is entered for the old rate. I.e. if a customer is set up with a city/provincial rate of 6.5% it will not be changed if the old rate entered is specified as 7.
8. You are now ready to make new sales in Sales Order and Invoicing that will have the new sales tax rate.