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User's Manual

Project name: TrueLoaded

Module: Location_Taxes

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version 1.2

o s C o m m e r c e m o d u l e s
I n t e g r a t i o n w i t h E R P s y s t e m s
S e r v i c e s
S k i n s

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Introduction

The Locations/Taxes section allows for correction of names (full or abbreviated) of customers locations who fill their questionnaires according to the ISO2 and ISO3 standards, as well as for defining special tax zones (according to the laws currently in force on the territory of these zones).

New tax rates can be added to existent tax classes or to a new tax class, and are based on a country->state/zone relationship.

This allows products to be taxed accordingly to where the purchase is coming from, and achieves a final tax rate value by adding or compounding the tax rates defined in the assigned products tax class.

Tax rates can be created by:

- Defining a Tax Zone
- Defining a Tax Class
- Defining a Tax Rate

An example provided in this manual is based on creation of a new 17.5% tax rate for the European Union, and is setup on the Locations/Taxes section of the Administration Panel.



Holbi Locations / Taxes :: Countries

	Country	ISO Codes
Administrator	Afghanistan	AF AFG
Configuration	Albania	AL ALB
	Algeria	DZ DZA
Catalog	American Samoa	AS ASM
Info system	Andorra	AD AND
	Angola	AO AGO
NewsDesk	Anguilla	AI AIA
FAQDesk	Antarctica	AQ ATA
	Antigua and Barbuda	AG ATG
Modules	Argentina	AR ARG
Vouchers/Coupons	Displaying 1 to 10 (of 239 countries)	
Customers/Orders		<< Page 1 >>
Paypal IPN		<input type="button" value="new"/>
Affiliates		
Locations / Taxes		
	Countries	
	Zones	
	Tax Zones	
	Tax Classes	
	Tax Rates	

Countries

Editing A Country

- From the Admin Panel click the **Locations/Taxes** link. The Countries page is open on the screen. On this page there is a list of countries available in the web-store. Here you can edit any record. To do this, select a country in the list and click the **Edit** button on the right.

Locations / Taxes :: Countries

osCommerce | Catalog | Admin | Log

Country	ISO Codes	Action	Afghanist
Afghanistan	AF AFG	▶	edit delete
Albania	AL ALB	ⓘ	
Algeria	DZ DZA	ⓘ	
American Samoa	AS ASM	ⓘ	
Andorra	AD AND	ⓘ	
Angola	AO AGO	ⓘ	
Anguilla	AI AIA	ⓘ	
Antarctica	AQ ATA	ⓘ	
Antigua and Barbuda	AG ATG	ⓘ	
Argentina	AR ARG	ⓘ	

Displaying 1 to 10 (of 239 countries) << Page 1 of 24 >>

[new country](#)

Name:
Afghanistan


ISO Code (2): A


ISO Code (3): A

Address Format

- In the fields displayed on the right, check up spelling of the country name specified in all the languages installed in your web-store, and correct the name if needed.

Name:

 Afghanistan

 Afghanistan

- In the fields below, check up spelling of the country short name abbreviated according to the ISO2 standard (consisting of two letters) and ISO3 standard (consisting of three letters).

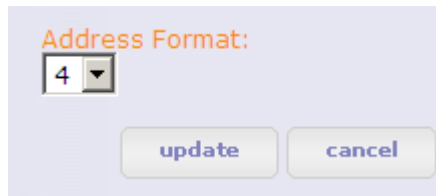
ISO Code (2):

AF

ISO Code (3):

AFG

4. In the dropdown list below, select appropriate address format for this country.

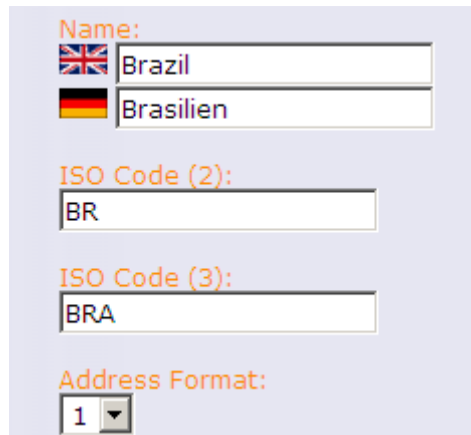


Address Format:
4
update cancel

5. Click the **Update** button to save changes.

Creating A New Country

1. From the Locations/Taxes > Countries page click the **New Country** button below the list to add a new country.
2. Fill all the fields in and click the **Insert** button.



Name:
Brazil
Brasilien
ISO Code (2):
BR
ISO Code (3):
BRA
Address Format:
1

Deleting A Country

1. You can delete any record in the Locations/Taxes section. From the Countries page select a country and click the **Delete** button on the right.



Country	ISO Codes	Action	Brazil
Belgium	BE BEL	ⓘ	delete
Belize	BZ BLZ	ⓘ	
Benin	BJ BEN	ⓘ	

2. Click the **Delete** button again to confirm deletion. Or, click **Cancel** if you've changed your mind.

Zones

From the Admin Panel click the **Locations/Taxes** link and select the **Zones** section. On the Zones page one can manage (add/delete/edit) zones available in the web-store (states, provinces, shires, etc).

Creating A New Zone

1. From the Admin Panel > Locations/Taxes > Zones page click the **New Zone** button.

Country	Zones	Code	Action
Austria	Burgenland	BL	▶
Austria	Kärnten	KN	ⓘ
Austria	Niederösterreich	NO	ⓘ
Austria	Oberösterreich	OO	ⓘ
Austria	Salzburg	SB	ⓘ
Austria	Steiermark	ST	ⓘ
Austria	Tirol	TI	ⓘ
Austria	Voralberg	VB	ⓘ
Austria	Wien	WI	ⓘ
Canada	Alberta	AB	ⓘ

Displaying 1 to 10 (of 181 zones) << Page 1 9 >>

[new zone](#)

2. In the fields displayed on the right, specify information about a new zone. In the first field, specify full name of the Zone.
3. In the next field, specify a code of a zone (consisting of 2 characters).
4. In the drop down list below, select a country where this zone is located.

Zones Name:

Zones Code:

Country:

5. Click the **Insert** button to save a new zone.

Editing A Zone

1. From the Locations/Taxes > Zones page you can edit any zone. To do this, select a zone in the list and click the **Edit** button on the right.



Country	Zones	Code	Action	
Austria	Burgenland	BL	▶	edit
Austria	Kärnten	KN	ⓘ	
Austria	Niederösterreich	NO	ⓘ	delete

2. In the right column, edit a full name of zone, code of zone and select an appropriate country for this zone.
3. Click the **Update** button to save changes.

Deleting A Zone

1. From the Locations/Taxes > Zones page you can delete any zone. To do this, select a zone in the grid and click the **Delete** button on the right.



Country	Zones	Code	Action	
Austria	Burgenland	BL	▶	delete
Austria	Kärnten	KN	ⓘ	
Austria	Niederösterreich	NO	ⓘ	delete

2. Click the **Delete** button again to confirm deletion.

Tax Zones

From the Admin Panel click the **Locations/Taxes** link and select the **Tax Zones** section. On the Tax Zones page one can define zones for taxes.



Defining A Tax Zone

Tax Zones are required to calculate appropriate tax rate value based on where the purchase is coming from. All matching tax rates are either added or compounded together depending on the Tax Class definition. If no tax zones match the origin of purchase, then no tax is applied to an order.

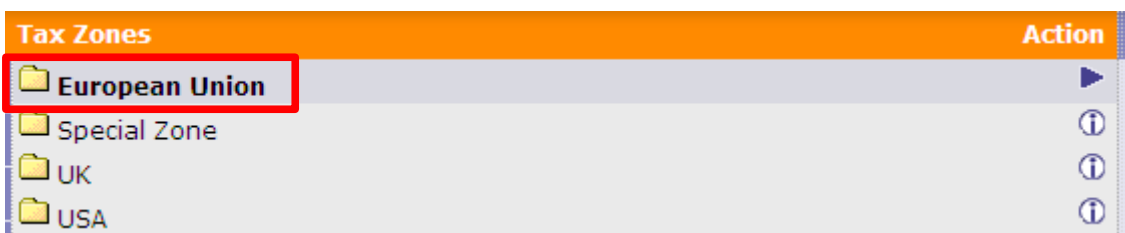
An example below will create a new Tax Zone for the European Union, which would contain all countries and states of the European Union.

1. Click the **Insert** button below the list.
2. In the fields displayed on the right, specify **Zone Name** and **Description**.

Zone Name:

Description:

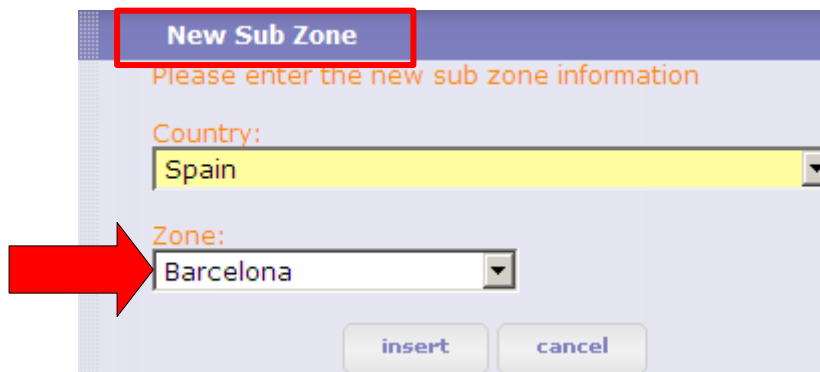
3. Click the **Insert** button again to save a new Tax Zone.



- 4. New Sub Zones can be attached to the Tax Zone by highlighting the Tax Zone item in the list (or clicking the “folder” icon) and clicking on the **Insert** button.



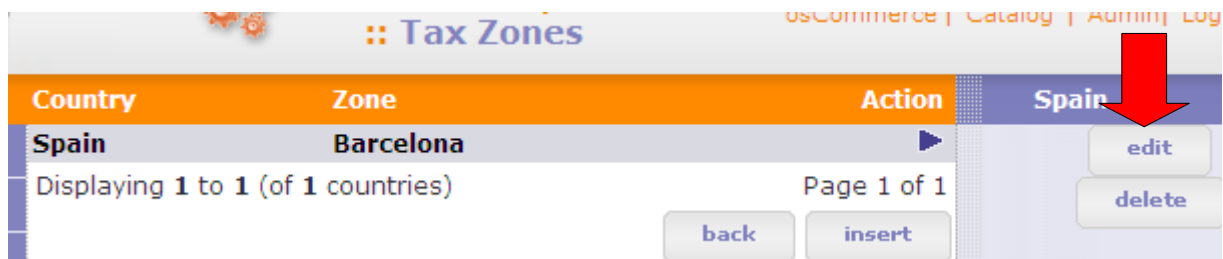
- 5. While inserting new sub zones into a Tax Zone, the **Zone** dropdown menu is automatically updated to list states/zones of the country. You can select either individual states/zones or **All Zones**.



Note: The countries and states/zones relationship is defined separately in the Countries and States/Zones section of the Administration Panel.

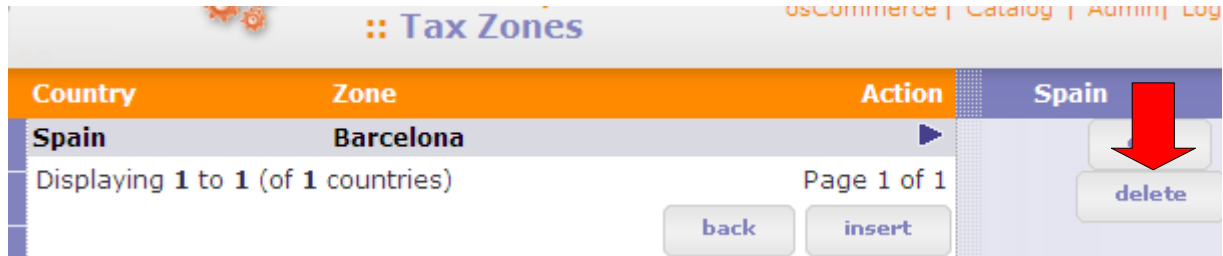
- 6. When you have finished, click the **Insert** button to save a new Tax Sub Zone.

*Note: You can correct the sub zone by clicking the **Edit** button on the right.*

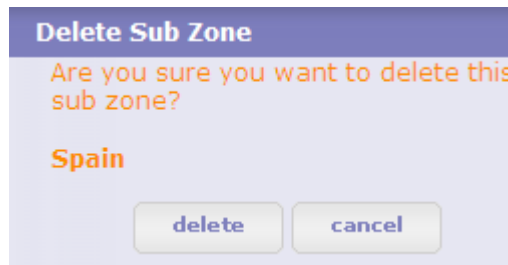


Deleting A Tax Sub Zone

1. To delete Tax Sub Zone, select a record in the grid and click the **Delete** button on the right.



2. Click the **Delete** button again to confirm deletion. Or, click **Cancel** if you do not want to delete.



Deleting A Tax Zone

1. To return from the Tax Sub Zones page to the Tax Zones page, use the **Back** button.



2. On the Tax Zones page you can delete the whole Tax Zone with all the sub zones included. To do that, select a Tax Zone in the list and click the **Delete** button.



3. Click the **Delete** button again to confirm deletion.

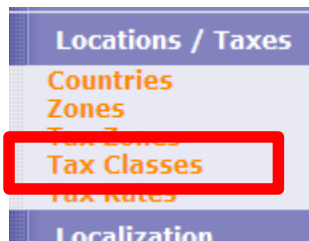
Warning:

Please be careful while creating a Tax Zone! If you specify incorrect Tax Zone name or other parameters, the taxation calculations will be wrong. The wrong parameters of one zone influence the wrong parameters of other zones and sub zones, therefore the prices will be calculated with doubled tax rate or even without taxes at all. That's why after adding a new tax zone, please check the prices calculation in your store for this new zone and for other zone as well.

Please, remember! If you assign one and the same country to several Tax Zones, the Tax Rate will be calculated several times, and so, please, do not do this to avoid the mess.

Tax Classes

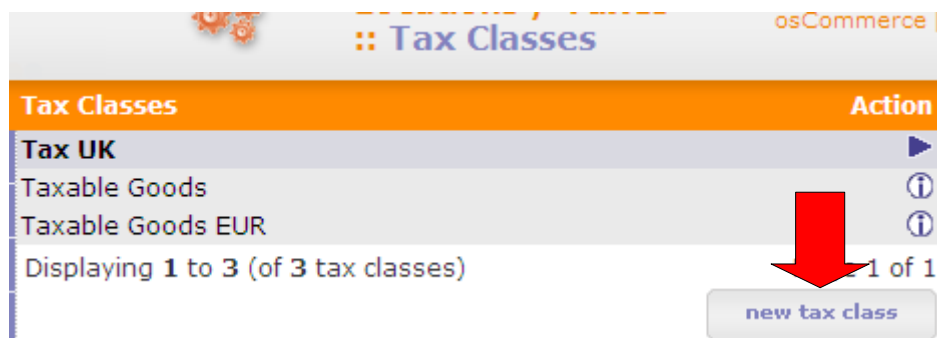
From the Admin Panel click the **Locations/Taxes** link and select the **Tax Classes** section. On this page one can set up Tax Classes.



Tax Classes are required to group Tax Zones and Tax Rates together, and to allow products to be assigned a Tax Class which would inherit the Tax Zone and Tax Rate relationships.

Defining a Tax Class

1. To set up a new tax class, click the **New Tax Class** button on the Tax Classes page.



2. In the fields displayed on the right, specify the **Tax Class Title** and **Description**. For example, *Tax UK*.

Tax Class Title:	<input type="text" value="Tax UK"/>
Description:	<input type="text" value="Tax UK"/>

- To save your data, click the **Insert** button.
Note: The title of Tax Class is shown on the Order Confirmation page and lists the calculated tax rate value.

Editing A Tax Class

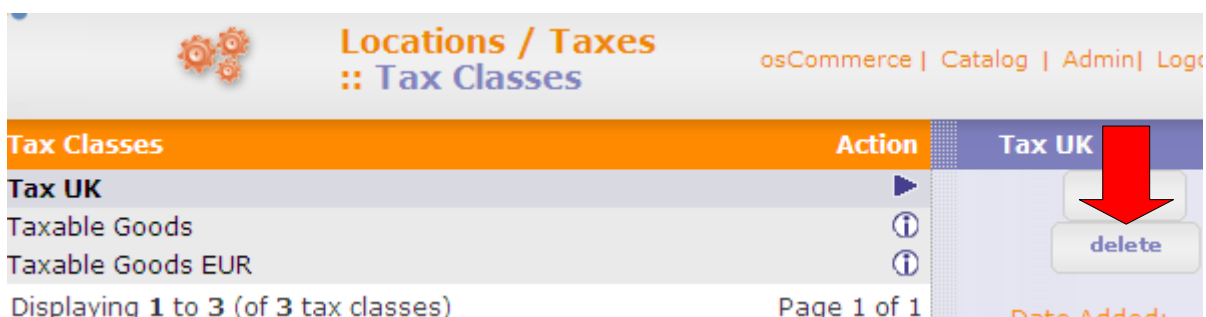
- To edit a Tax Class, select the tax class record on the Tax Classes page and click the **Edit** button on the right.



- In the right column, correct the **Tax Class Title** (in the first field) and its **Description** (in the second field).
- Click the **Insert** button to save your changes.

Deleting Tax Classes

- You can delete any record from the Tax Classes page. To do this, select the Tax Class in the list and click the **Delete** button on the right.



- Click the **Delete** button again to confirm deletion.

Tax Rates

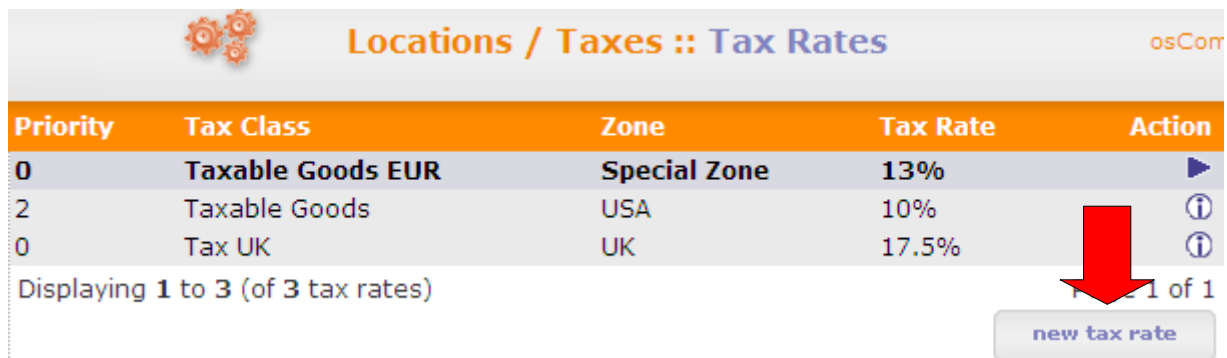
Tax Rates are required for grouping of the Tax Zones and Tax Rates together for a Tax Class, and defining the percentage that is used for the tax rate value.

The Tax Rate calculations are based on the priority of multiple tax rates defined in a Tax Class. Multiple tax rates defined with the same priority values are added to form a final tax rate percentage value, and multiple tax rates with different priority values are compounded together in priority order to form a final tax rate percentage value.

Priorities are needed when residents of a country may need to pay a National Sales Tax Rate, and residents of a particular state also need to pay a Local Tax Rate in addition to the National Sales Tax Rate.

Creating A New Tax Rate

1. From the Admin Panel click the **Locations/Taxes** link and select the **Tax Rates** section.
2. From the Tax Rates page you can set up tax rate related to a certain Tax Zone. Here you can add a new tax rate, edit existent one, and change the Tax Zone where this Tax Rate is applied.
3. To create a new tax rate, click the **New Tax Rate** button on the Tax Rates page.



Priority	Tax Class	Zone	Tax Rate	Action
0	Taxable Goods EUR	Special Zone	13%	▶
2	Taxable Goods	USA	10%	ⓘ
0	Tax UK	UK	17.5%	ⓘ

Displaying 1 to 3 (of 3 tax rates)

Page 1 of 1

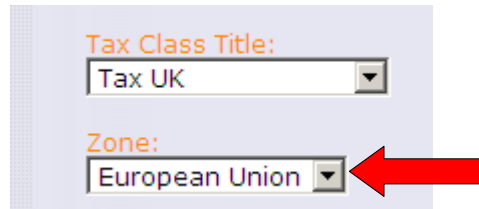
[new tax rate](#)

4. In the right column the fields are displayed. Select appropriate tax class in the **Tax Class Titel** dropdown list. For example: *Tax UK*.

Tax Class Title:

Tax UK

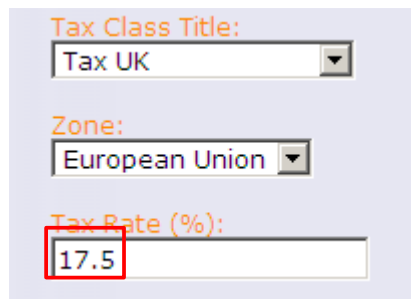
5. In the **Zone** dropdown list, select appropriate tax zone for the tax rate chosen above. For example: *European Union*.



Tax Class Title:
Tax UK

Zone:
European Union

6. In the next field, specify the **Tax Rate**. For example: 17.5.



Tax Class Title:
Tax UK

Zone:
European Union

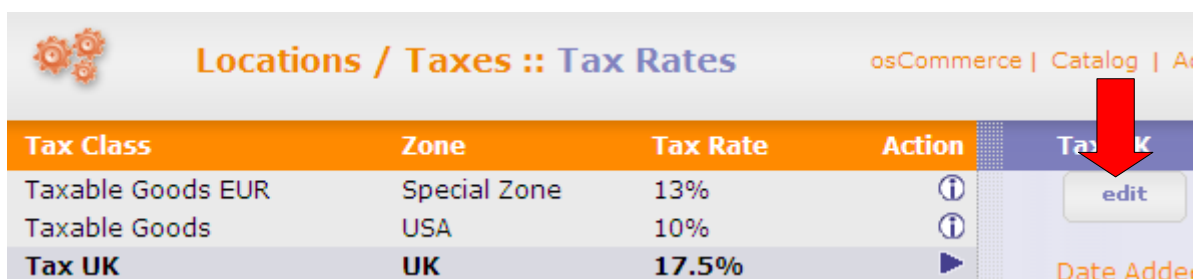
Tax Rate (%):
17.5

7. In the next field, you can type a short description of the tax that will be displayed on the Order Confirmation page.
8. In the **Priority** field, specify the priority for this tax (a number).

Note: Please pay your attention to the fact that the rates of taxes with similar priorities are summed up, but the rates of taxes with different priorities accrue - first one tax is counted, then another tax is added to the resulting sum.

Editing A Tax Rate

1. You can edit any record from the Tax Rates page. To do this, select a tax rate in the grid and click the **Edit** button on the right.



Tax Class	Zone	Tax Rate	Action	Tax UK
Taxable Goods EUR	Special Zone	13%		
Taxable Goods	USA	10%		
Tax UK	UK	17.5%		

2. Select appropriate tax class in the dropdown list (you can change a current class to another one).
3. Select the tax zone in the dropdown list (you can change a current zone to another one).
4. In the next field, specify the tax rate.
5. In the next field you can type a short description of the tax.
6. In the next field, set the priority for this tax.

Deleting A Tax Rate

1. From the Tax Rates page you can delete any record. To do this, select a tax in the grid and click the **Delete** button on the right.



Locations / Taxes :: Tax Rates osCommerce | Catalog | Admin | Logoff

Tax Class	Zone	Tax Rate	Action
Taxable Goods EUR	Special Zone	13%	
Taxable Goods	USA	10%	
Tax UK	UK	17.5%	

1 to 3 (of 3 tax rates) Page 1 of 1

Tax UK

Date Added: 03/18/2006
Last Modified: 03/18/2006

Description: Tax UK

2. Click the **Delete** button again to confirm deletion.



Delete Tax Rate

Are you sure you want to delete this tax rate?

Tax UK 18%