

## Changing to HST – RMS Headquarters (Ontario)

For detailed information on the tax rate change, please visit the Canada Revenue Agency website and refer to **HST for Ontario** at the following site:

<http://www.cra-arc.gc.ca/gncy/hrmztn/on/menu-eng.html>

**Taxes should be changed after close on June 30, 2010 and prior to opening on July 1, 2010.**

### Step 1: Set up the new tax rates – (Do this step in advance!)

\*\* Important: It is important that you do this step in advance to give the stores a chance to Z their registers. Days or weeks in advance is fine.

Open Headquarters Manager → Login as normal → File → Maintenance Mode

Click Database → Sales Taxes

- Click New
- Enter HST in both Description and Code
- Enter 13.00 in the Sales Tax Rate (%)
- Press Ok to save

For systems with stores in multiple provinces, HST descriptions and codes should be created indicating the province (Example: HST-ONT, HST-BC, HST-NS)

Upper Bracket	Sales Tax
\$0.00	\$0.00
\$0.00	\$0.01
\$0.00	\$0.02
\$0.00	\$0.03
\$0.00	\$0.04
\$0.00	\$0.05
\$0.00	\$0.06
\$0.00	\$0.07
\$0.00	\$0.08
\$0.00	\$0.09

If you are selling items that are to charge only the federal portion of the HST like Children's clothing, create an additional HST Sales Tax for these types of items.

- Click New
- Enter HST2 (or HST@5) in both Description and Code
- Enter 5.00 in the Sales Tax Rate (%)
- Press Ok to save

For systems with stores in multiple provinces, HST descriptions and codes should be created indicating the province (Example: HST-FPONT, HST-FPBC)

Upper Bracket	Sales Tax
\$0.00	\$0.00
\$0.00	\$0.01
\$0.00	\$0.02
\$0.00	\$0.03
\$0.00	\$0.04
\$0.00	\$0.05
\$0.00	\$0.06
\$0.00	\$0.07
\$0.00	\$0.08
\$0.00	\$0.09

Click Database → Item Taxes

- Click New
- Enter HST for both the Description and Code
- Select HST beside the 1<sup>st</sup> Sales Tax Selection
- Check on the On Receipt
- Press OK to save

Order	Sales Tax Selection	On Receipt
1st	HST	<input checked="" type="checkbox"/>
2nd	<none>	<input type="checkbox"/>
3rd	<none>	<input type="checkbox"/>
4th	<none>	<input type="checkbox"/>
5th	<none>	<input type="checkbox"/>
6th	<none>	<input type="checkbox"/>
7th	<none>	<input type="checkbox"/>
8th	<none>	<input type="checkbox"/>
9th	<none>	<input type="checkbox"/>
10th	<none>	<input type="checkbox"/>

If you are selling items that are to charge only the federal portion of the HST like Children's clothing, create an additional HST Item Tax for these types of items.

- Click New
- Enter HST2 or HST@5 in both Description and Code
- Select HST2 (the 5% HST created in Sales Tax) beside the 1<sup>st</sup> Sales Tax Selection
- Check on the On Receipt
- Press OK to save

Order	Sales Tax Selection	On Receipt
1st	HST2	<input checked="" type="checkbox"/>
2nd	<none>	<input type="checkbox"/>
3rd	<none>	<input type="checkbox"/>
4th	<none>	<input type="checkbox"/>
5th	<none>	<input type="checkbox"/>
6th	<none>	<input type="checkbox"/>
7th	<none>	<input type="checkbox"/>
8th	<none>	<input type="checkbox"/>
9th	<none>	<input type="checkbox"/>
10th	<none>	<input type="checkbox"/>

**Create a Worksheet to send the New Taxes to the Store(s) (Do this in advance)**

From the main menu select Worksheets → Style 203: Update Inventory – Sales tax

Select the Ontario stores that are to have the changes made.

The screenshot shows a dialog box titled "Worksheet Wizard - Update Inventory - Sales Tax" with a close button (X) in the top right corner. The main heading is "Select Stores" with the instruction "Specify which stores the worksheet should apply to." Below this, there are two sections: "This worksheet should apply to:" with a dropdown menu set to "One or more stores", and "Store(s) to receive this worksheet:" with a list of four items: "Store 001 - Ontario", "Store 002 - Ontario", "Store 003 - BC" (which is checked and highlighted), and "Store 004 - Other". Below the list are three buttons: "Regions", "None", and "All". At the bottom of the dialog are three buttons: "< Back", "Next >", and "Cancel".

Press Next to continue

Set the Effective Date to July 1, 2010 and the Time to a time prior to opening the store. Make adjustments. Remember to stagger the times for multiple stores.

The screenshot shows the same dialog box, now at the "Enter Title and Effective Date" step. The instruction is "Specify the worksheet title and when the worksheet will be effective." There are two input fields: "Worksheet Title:" with the text "Update Inventory - Sales Tax" entered, and "Effective date/time:" with a date dropdown set to "07/01/2010" and a time dropdown set to "3:30:22 AM". At the bottom are three buttons: "< Back", "Next >" (which is highlighted with a dashed border), and "Cancel".

Click Next, Finish and then approve the Worksheet.

## Step 2: Change Appropriate Taxes by Item (Required for July 1<sup>st</sup>)

This step can be done in advance but the effective date of the worksheet should be after close on June 30<sup>th</sup>.

To taxation changes should be done through a Style 320 Worksheet – Adjust Item Sales Tax

From the main menu select Worksheets → Style 320: Adjust Item Sales Tax.

Select the Ontario stores that are to have the changes made.

The screenshot shows the 'Worksheet Wizard - Adjust Item Sales Tax' dialog box. The title bar reads 'Worksheet Wizard - Adjust Item Sales Tax'. The main heading is 'Select Stores' with the instruction 'Specify which stores the worksheet should apply to.' Below this, there is a text box labeled 'This worksheet should apply to:' containing the text 'One or more stores'. Underneath is a section titled 'Store(s) to receive this worksheet:' which contains a list of four stores: 'Store 001', 'Store 002', 'Store 003', and 'Store 004'. Each store name has a checked checkbox to its left. At the bottom of this list are three buttons: 'Regions', 'None', and 'All'. At the very bottom of the dialog box are three buttons: '< Back', 'Next >', and 'Cancel'.

Press Next to continue.

Set the Effective Date to July 1, 2010 and the Time to a time prior to opening the store. Make adjustments. Remember to stagger the times for multiple stores.

The screenshot shows the 'Worksheet Wizard - Adjust Item Sales Tax' dialog box. The title bar reads 'Worksheet Wizard - Adjust Item Sales Tax'. The main heading is 'Enter Title and Effective Date' with the instruction 'Specify the worksheet title and when the worksheet will be effective.' Below this, there is a text box labeled 'Worksheet Title:' containing the text 'Adjust Item Sales Tax'. Underneath is a section titled 'Effective date/time:' which contains two dropdown menus. The first dropdown menu shows '07/01/2010' and the second dropdown menu shows '3 :00:00 AM'. At the bottom of the dialog box are three buttons: '< Back', 'Next >', and 'Cancel'.

Press Next to continue.

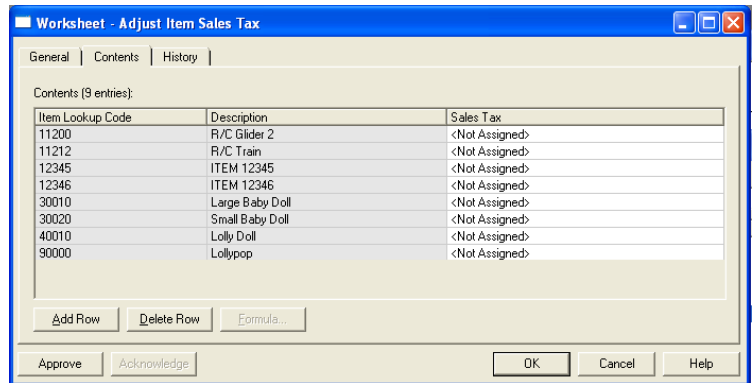
Select groups of items by using the drop-down list to select by department or categories. Alternately, filters can be used to select the range of items.



Press Next when the selection criteria has been entered.

Press the Finish button on the next screen

To assign the same tax on all items on this screen, highlight the Sales Tax column on top item in the list.

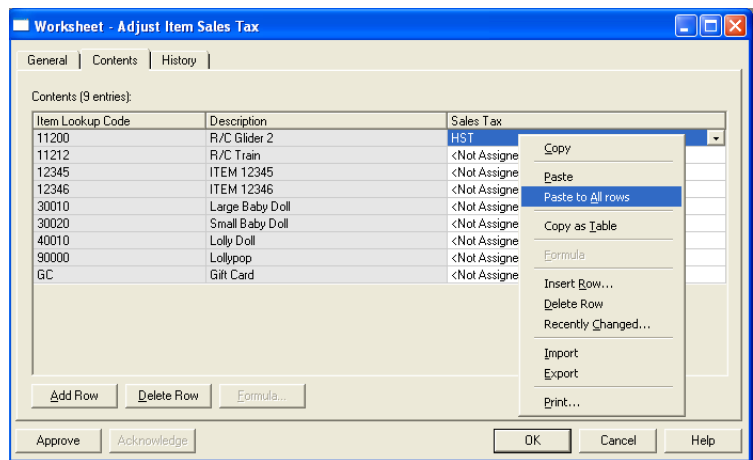


Using the drop-down option, select the appropriate Item Tax to change to.

Right-click on the new tax then select Copy.

Right-click again on the new tax then select Paste to all Rows.

Press the Commit button when all items on this display have the appropriate tax setting.



Press the Approve button when the taxes have been assigned correctly for all items in this screen.

Each time you run the Wizard, a new worksheet will be created. Continue to use the Wizard, creating as many worksheets as required to change all taxation to the appropriate new HST for all items.