

## Changing to HST – RMS Store Operations (Ontario)

For detailed information on the HST 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/hrmzn/on/menu-eng.html>

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

Open Store Operations Manager → Login as normal → Click Database → Sales Taxes

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

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 HST05 in both Description and Code
- Enter 5.00 in the Sales Tax Rate (%)
- Click Ok to save

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
- Click 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 (5%), create an additional HST Item Tax for these types of items.

- Click New
- Enter HST05 in both Description and Code
- Select HST05 (the 5% HST created in Sales Tax) beside the 1<sup>st</sup> Sales Tax Selection
- Check on the On Receipt
- Click OK to save

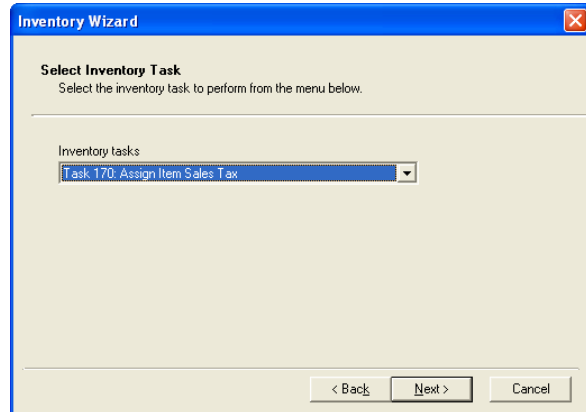
Order	Sales Tax Selection	On Receipt
1st	HST05	<input checked="" type="checkbox"/>
2nd	<none>	<input type="checkbox"/>
3rd	<none>	<input type="checkbox"/>
4th	<none>	<input type="checkbox"/>
5th	<none>	<input type="checkbox"/>
6th	<none>	<input type="checkbox"/>
7th	<none>	<input type="checkbox"/>
8th	<none>	<input type="checkbox"/>
9th	<none>	<input type="checkbox"/>
10th	<none>	<input type="checkbox"/>

Change appropriate taxes by item.

The easiest way to change taxation for items is to use the Inventory Wizard.

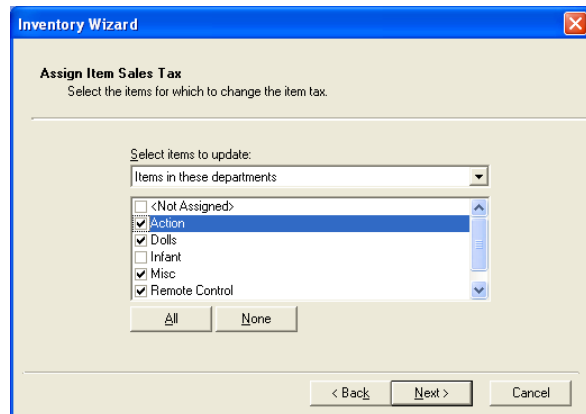
From the main menu select Wizards → Inventory Wizard.

Proceed to the screen where you can Select Inventory Task then, in the drop-down option, select "Task 170: Assign Item Sales Tax".



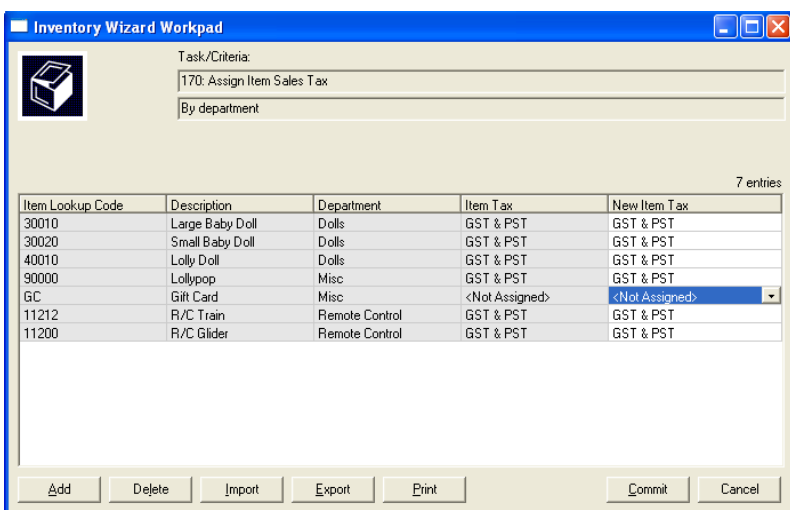
Press Next to continue.

Using the Select Items to Update drop-down and select items in the list that will be charging the same type of tax (all GST & PST taxable items or all GST Only Items).



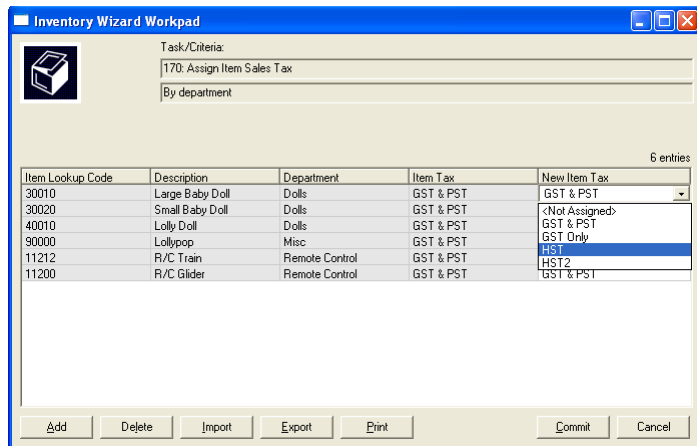
Press Next then Finish to continue.

Remove items that are not to be charged the same tax as all other items in the list. In this example, the Gift Card should be removed from the list.

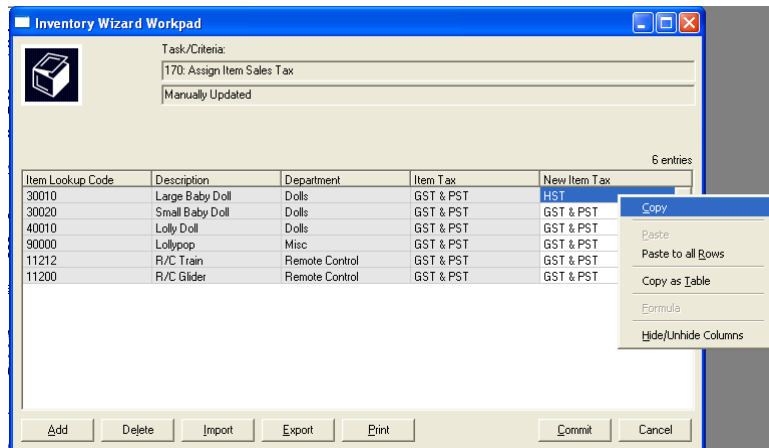


Highlight the New Sales Tax column on top item in the list.

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

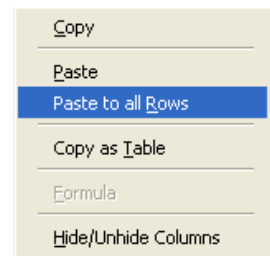


Right-click on the new tax then select Copy.



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.



Continue to use the Wizard to change all taxation to the appropriate new HST for all items.

If you prefer to have new items default to the new HST tax, change the configuration to default to use the new HST tax as default when adding new items.

In Store Operations Manager → File → Configuration → Sales Tax tab, change the 'Default item tax group' to HST.

The screenshot shows a 'Configuration' dialog box with the 'Sales Tax' tab selected. The 'Method Of Taxation' section has two radio buttons: 'Tax-Exclusive (United States, Canada)' (selected) and 'Value Added Tax (VAT) or Tax-Inclusive (Europe)'. Below these are two text boxes for 'VAT\_Reg No.:' and 'VAT\_Detail ID:'. The 'Tax Schedule Basis' section has two radio buttons: 'Assign tax schedules on a per item basis.' (selected) and 'Assign tax schedules on a per customer basis.'. Below these are two dropdown menus: 'Default item tax group:' (set to 'HST') and 'Customer field for tax matching:'. At the bottom are buttons for 'Captions', 'OK', 'Cancel', and 'Help'.

**Important!! You must run a Z report on all registers to complete these changes.**

It is recommended that you ring in a few test items and pay the sale so that you can print a receipt and verify that everything is working correctly. Don't forget to void this test sale.