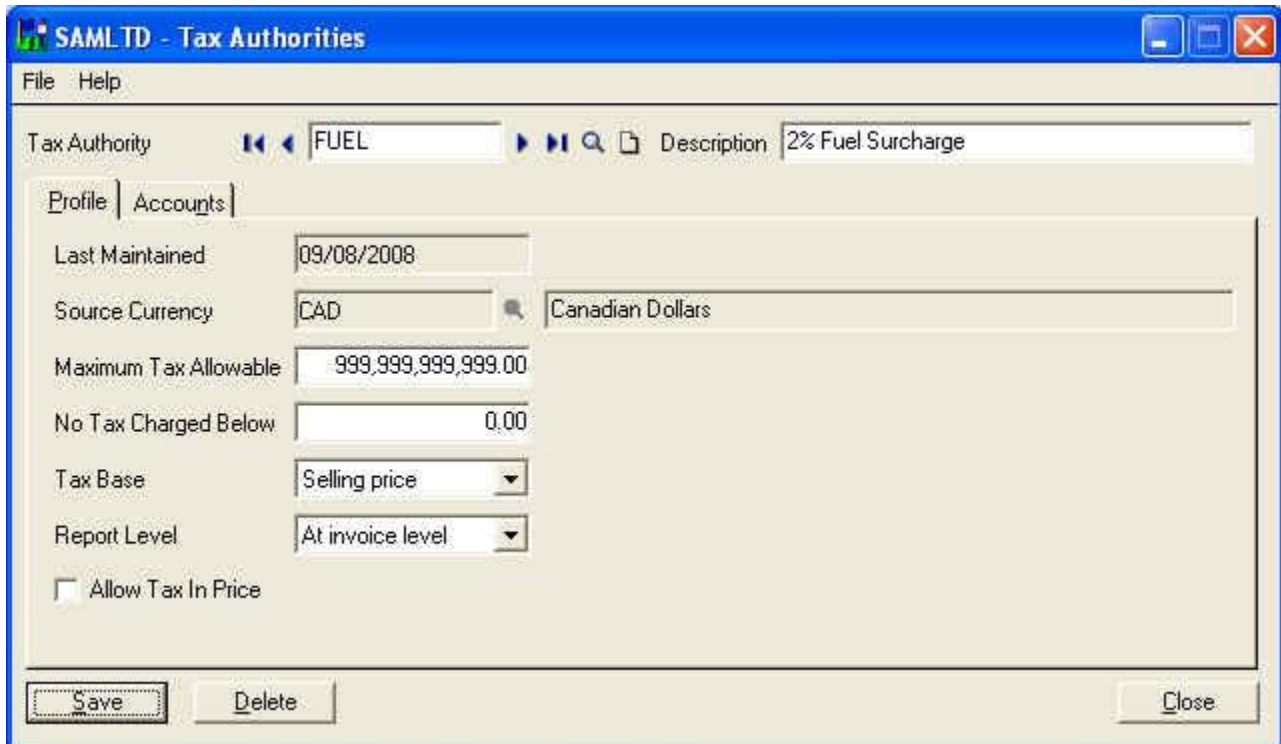


When is a Tax not a Tax?

The fluctuation in the cost of fuel today makes it difficult for some companies to recover fuel expenses in standard operating margins. Therefore they might want to add a fuel charge when invoicing customers, with the charge being calculated as a percentage of the invoice subtotal.

You can set up Sage Accpac ERP so it automatically adds/calculates this additional charge. Although you wouldn't automatically think of Accpac's Tax Services for the solution it can be used for a quick and simple fix.

In Common Services/Tax Services/Tax Authorities set up the new "tax authority" and attach it to the revenue account of your choice (i.e. "Fuel Surcharge Revenue")



The screenshot shows a software window titled "SAMLTD - Tax Authorities". The window has a menu bar with "File" and "Help". Below the menu bar, there is a search bar containing "FUEL" and a "Description" field containing "2% Fuel Surcharge". There are two tabs: "Profile" (selected) and "Accounts". The "Profile" tab contains the following fields:

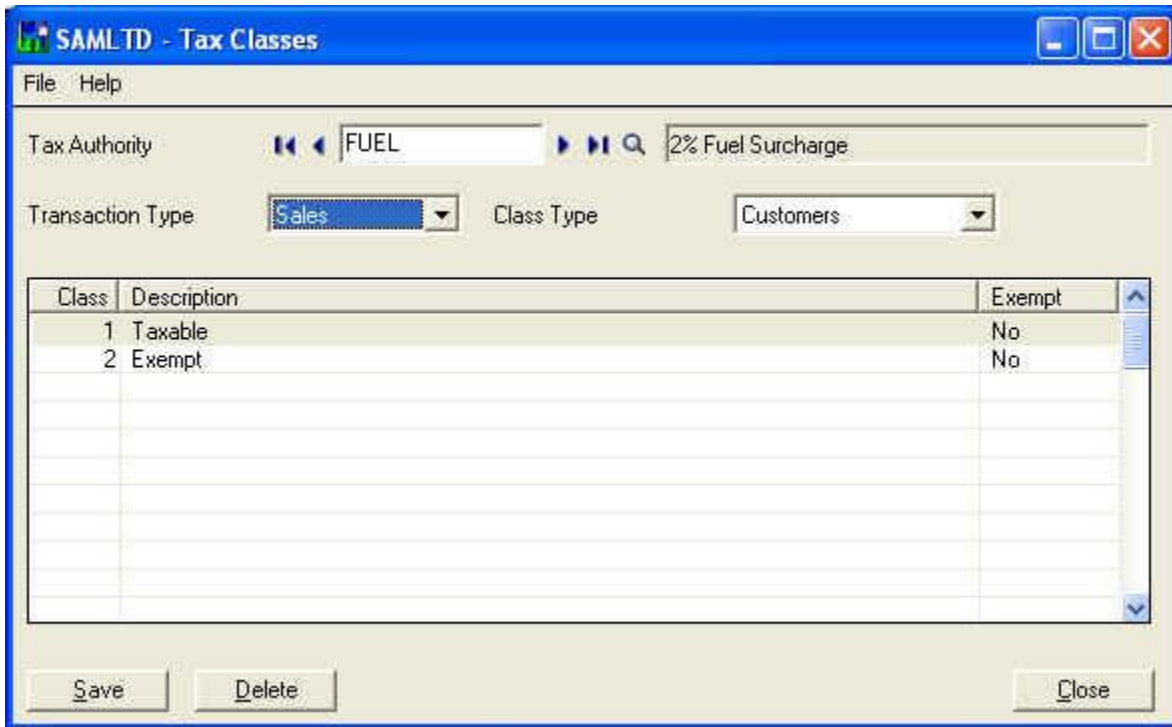
- Last Maintained: 09/08/2008
- Source Currency: CAD (Canadian Dollars)
- Maximum Tax Allowable: 999,999,999,999.00
- No Tax Charged Below: 0.00
- Tax Base: Selling price (dropdown menu)
- Report Level: At invoice level (dropdown menu)
- Allow Tax In Price

At the bottom of the window, there are three buttons: "Save", "Delete", and "Close".

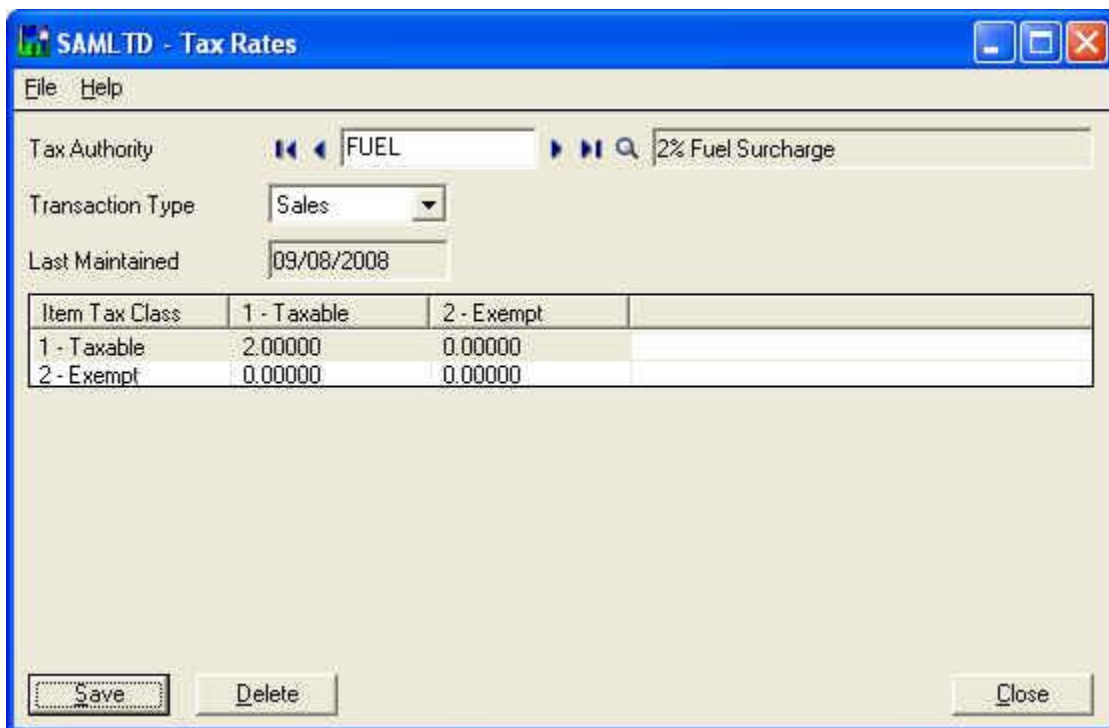
In Common Services/Tax Services /Tax Classes set up the taxable/exempt classes.

Accpac Tips and Tricks

Prepared by: Jeruzalski Computer Services Ltd.



In Common Services/ Tax Services/Tax Rates set up the rate for the fuel surcharge.



Accpac Tips and Tricks

Prepared by: Jeruzalski Computer Services Ltd.

In Common Services/Tax Services/Tax Groups modify all the tax groups that you want to add the fuel surcharge to, or you can create new tax groups to replace the old ones

The screenshot shows the 'SAMLTD - Tax Groups' window. The 'Tax Group' field is set to 'ONTTAX'. The 'Transaction Type' is 'Sales'. The 'Last Maintained' date is '09/08/2008'. The 'Description' is 'Ontario Tax - Sales'. The 'Source Currency' is 'CAD' (Canadian Dollars). The 'Tax Calculation Method' is 'Calculate tax by summary'. Below these fields is a table with the following data:

Authority	Description	Taxable	Surtax	Surtax on Aut...
FUEL	2% Fuel Surcharge	Yes	No	
GST	Goods and Service Tax	No	No	
PST	Provincial Sales Tax	No	No	

At the bottom of the window are buttons for 'Save', 'Delete', and 'Close'.

Depending on the set up of your Accpac database you might have to revise customers, "ship to locations", items and miscellaneous charges etc.

Revise your Crystal reports/forms to reflect the new "tax" and test the new set up with an order.

Similar set ups can be used for a variety of purposes, whenever the additional charge has to be calculated as a percentage of the order/invoice subtotal.

For more information on using and customizing your Accpac system contact us at (416) 490-1339