



TAX FREE HOLIDAY EVENT November, 2013 Retail Pro v9

It's that time of year and your local or state government is proposing a Holiday Tax Free event. In this case not all items are to be offered tax free but rather items that pertain to a class or type.

The event will last for a week and then return back to regular taxing.

Retail Pro can be configured to allow for this event with a few simple steps. Once it is setup, you can enable the feature on the day or evening before the event begins and again you can disable when the event ends.

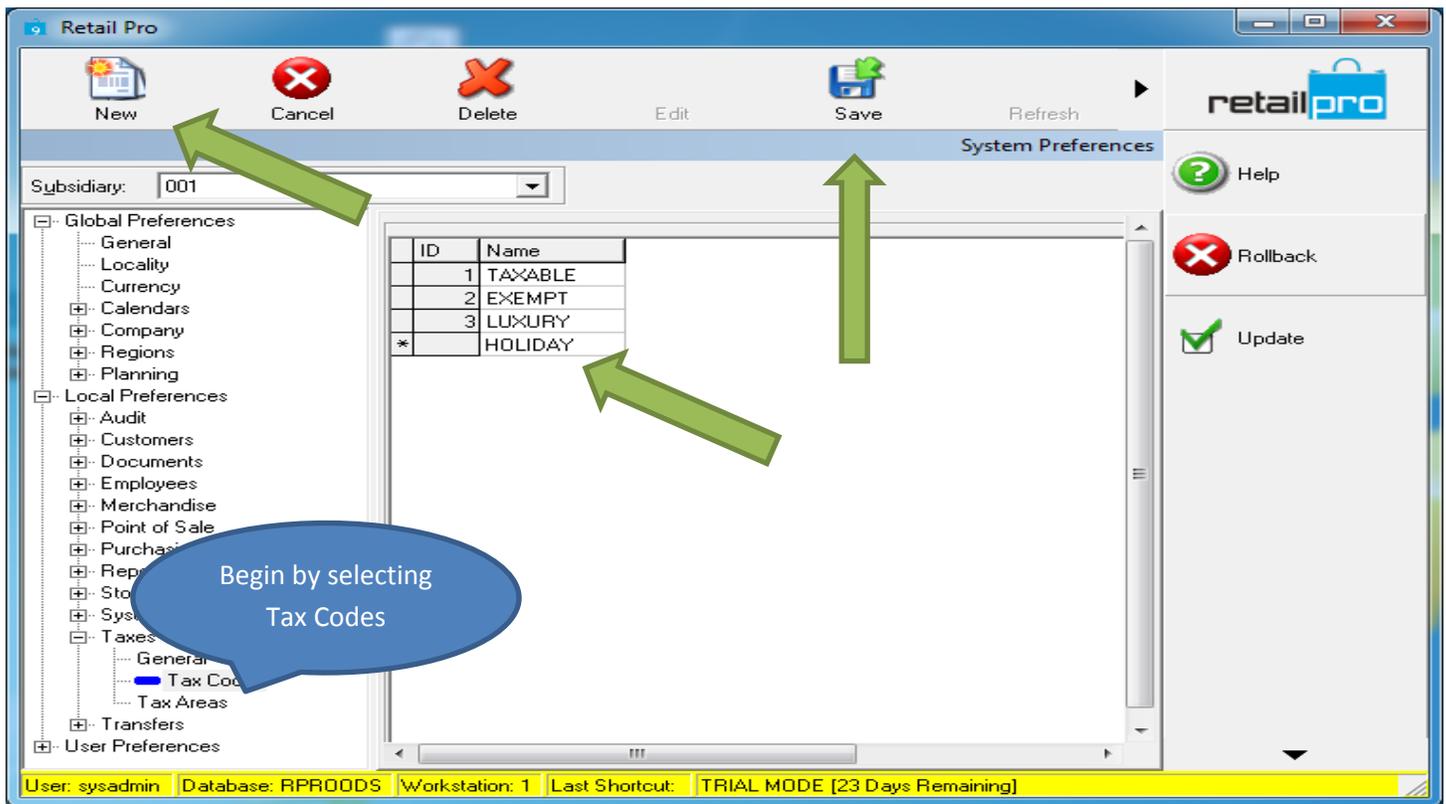
A few of things to know:

- 1- We will be creating a new **Tax Area** called Holiday (you may choose whatever name you prefer).
- 2- We will use **Tax Codes** to specify which skus will be affected (you may choose whatever **Tax Code** name).
- 3- This feature applies to both **RetailPro Version 8** and **Version 9**.

The following instructions are for RetailPro Version 9

- **STEP 1 - Options > System Preferences > Local Preferences > Taxes > Tax Codes > Select New**

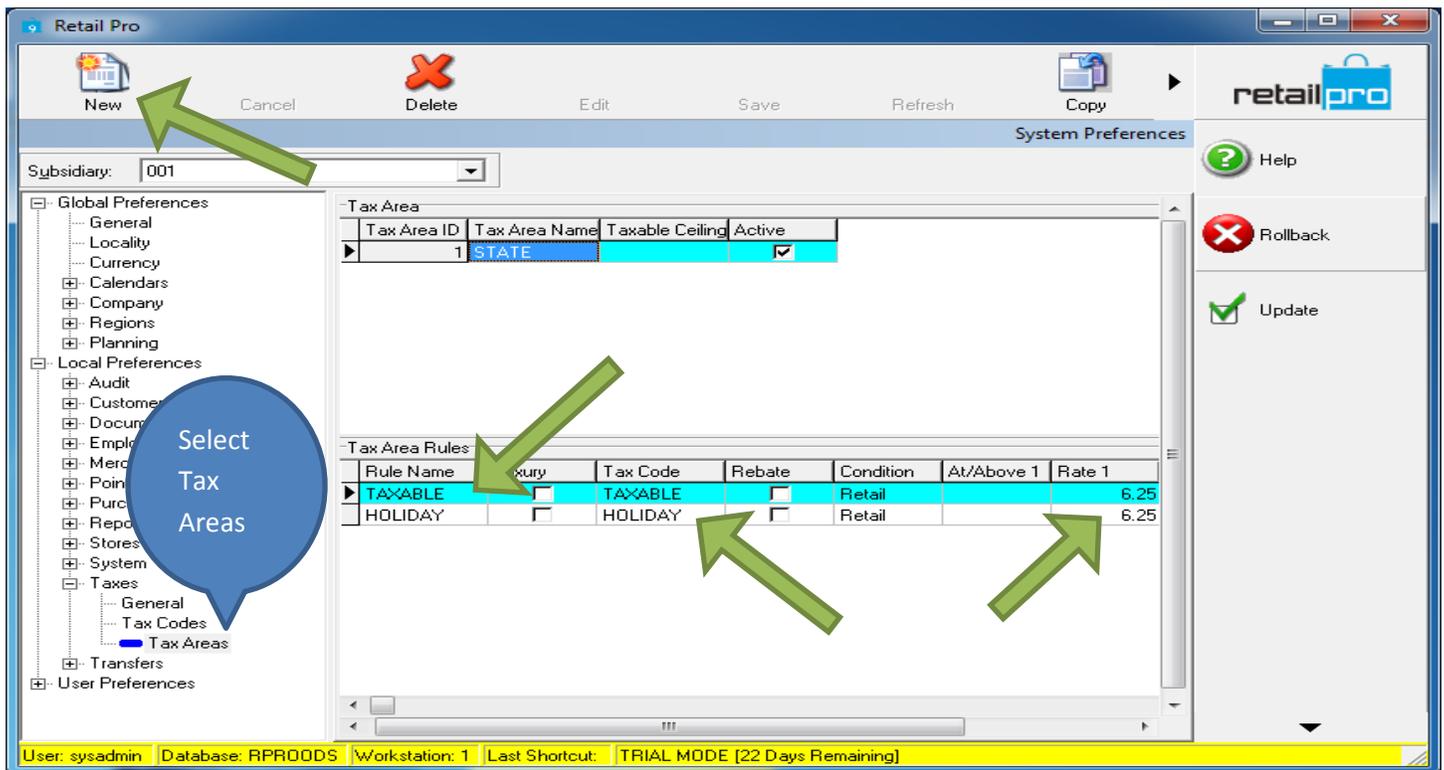
(For this example we have named it HOLIDAY) and then > **Save**.



NOTE: In order to switch between **Regular Tax** and **Holiday Tax Areas** during and after the **tax free event**, it is also necessary to add the new **Tax Code** to the **Regular (State) Tax Area** with the regular **Tax Rate** applied.

Next we add the New **Holiday Tax Code** to the **Tax Area Rules** for the existing Regular **State Tax**. This allows us to continue collecting tax on items with **HOLIDAY Tax codes** when the event is over. Note that both **Tax Rates** are the same.

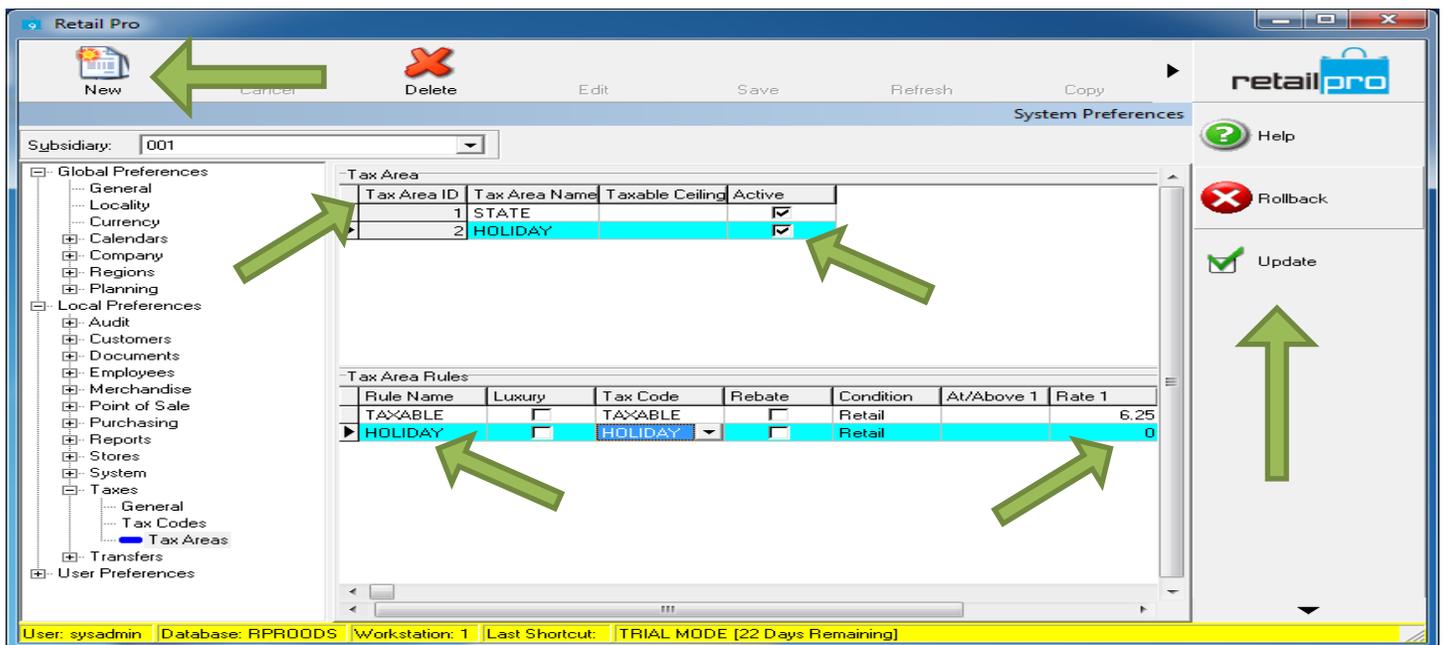
- **STEP 2 - Select Tax Areas > Highlight TAXABLE under Tax Area Rules and then > New.**
- **STEP 3 – Under the new Tax Area Rule assign the new Tax Code using the drop down.**
- **STEP 4 – Make sure the Tax Rate is the same as the Regular Tax Rate > Save.**



Next we need to add a new **Tax Area** named **HOLIDAY** to which we will also assign the same **Tax Area Rules** except on the **HOLIDAY Tax Area Rule** we will set the **Tax Rate** to **0.00** as shown in the following image.

- **STEP 5 – Highlight Tax Area ID > Select New > Assign Tax Area Name > Make Active > Repeat above steps with Tax Codes.**

Be sure to apply a **Tax Rate** of **0.00** to the **HOLIDAY Tax Code** as pictured below > then chose **Update**.

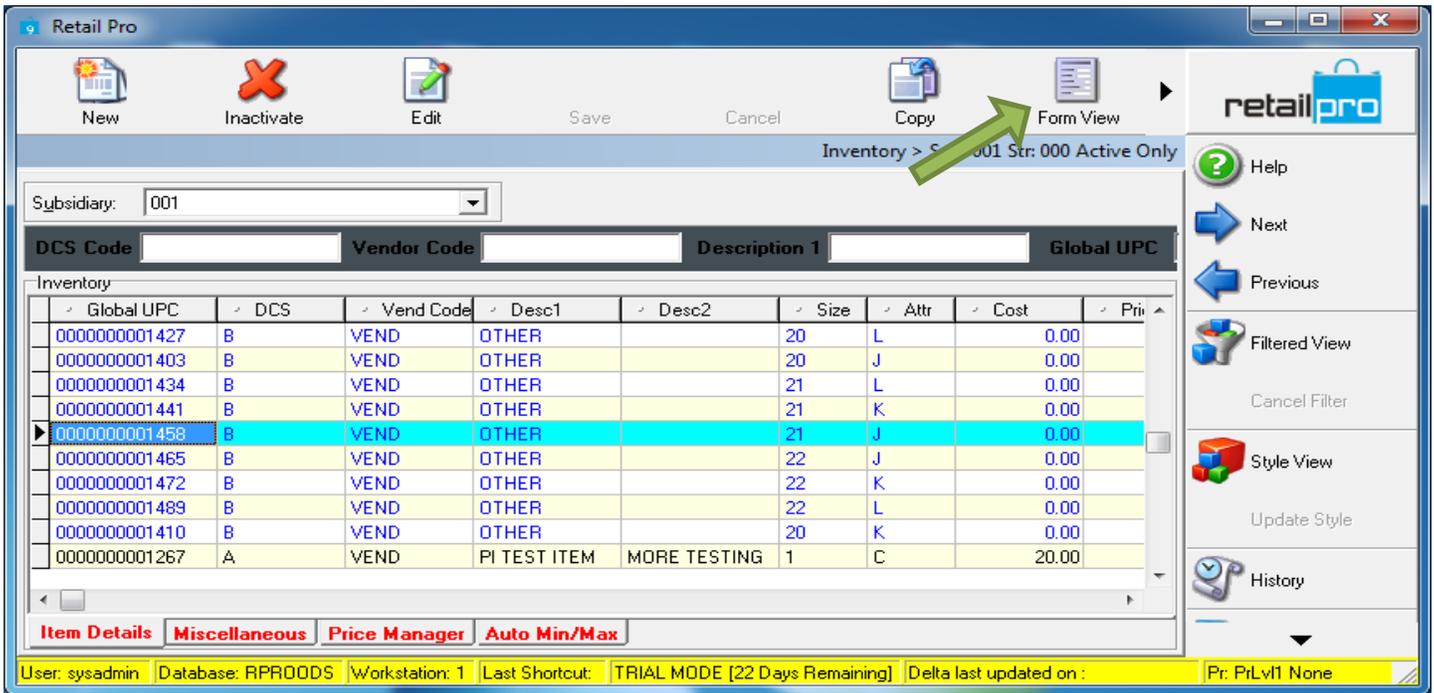


NOTE: Always remember to click the **Save** button after entering data and before moving on to next step. Once the **Tax Areas** and **Tax Rules** have been added you can click on **Update**.

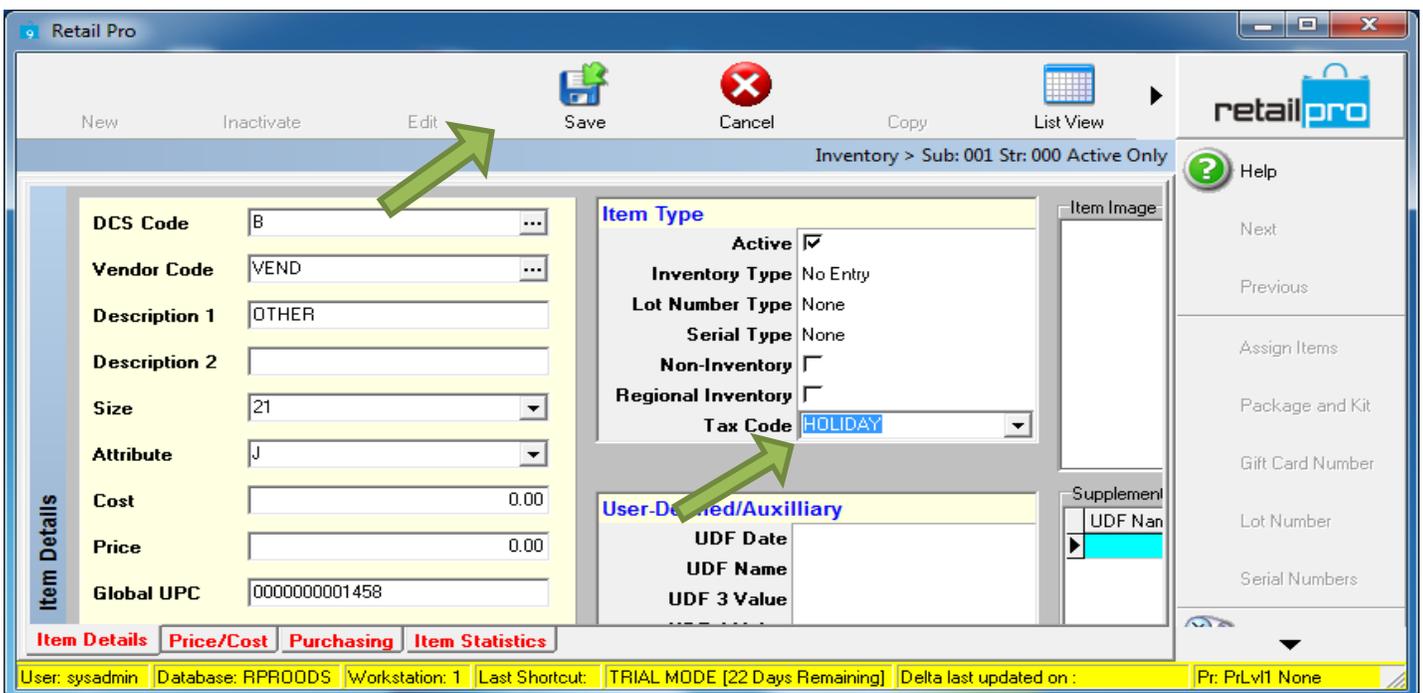
Now we will move on to assigning the new **Tax Code** **HOLIDAY** to specific items in our inventory.

NOTE: For the sake of this demo we will simply select a random item and to more easily display the **Item Properties** we will select **Form View**.

- **STEP 6 - Go to - Merchandise > Inventory -** (Use your regular method to search for an item to be modified) > **Form View**.



- **STEP 7 – Select Edit > Tax Codes > In drop down select new Tax Code then Save.**



Repeat these steps with all items involved in the tax free event.

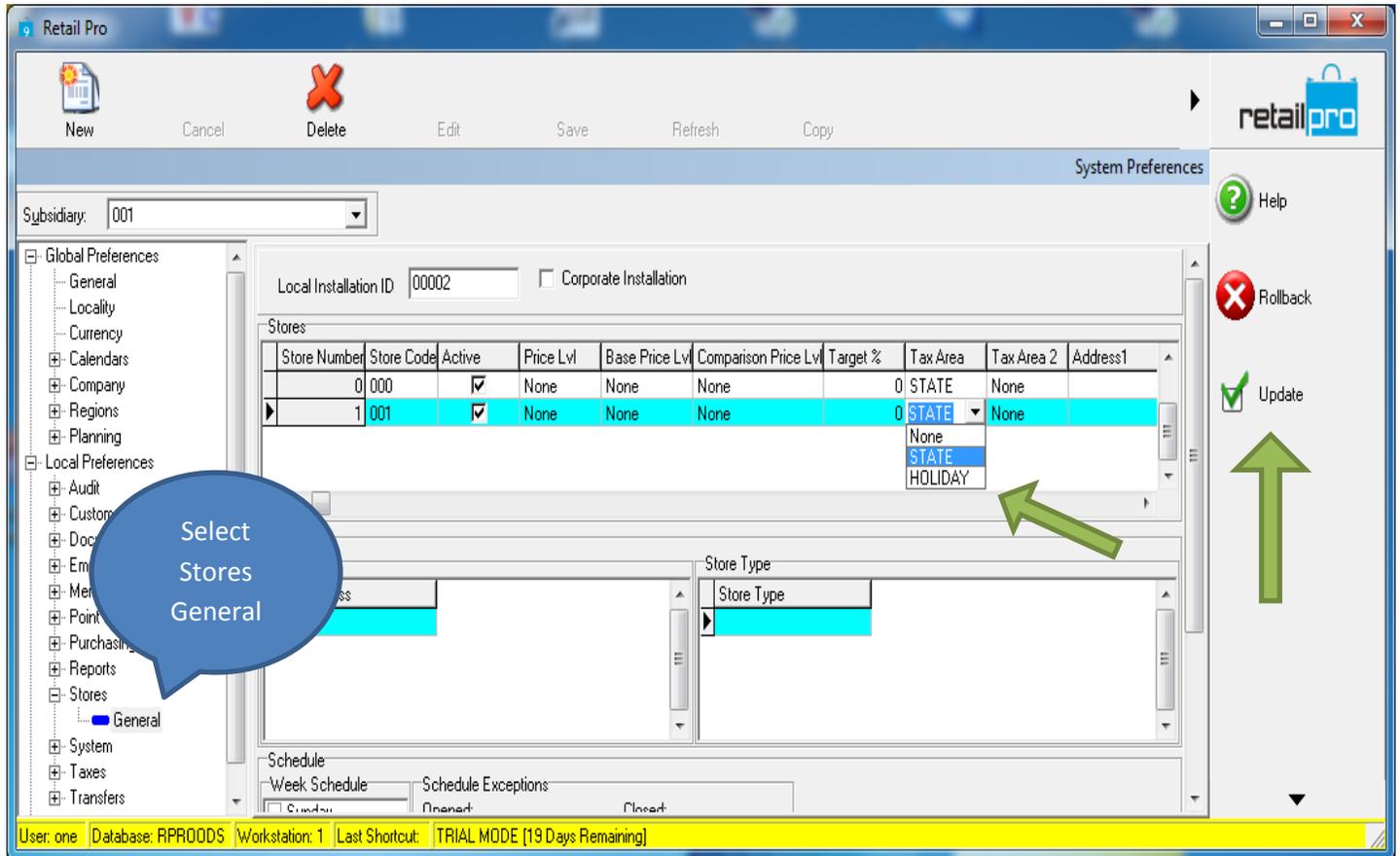
Now that your HOLIDAY items have been updated you can begin using the HOLIDAY Tax Area.

Following we will demonstrate the result of your new settings.

On the night before or day of the Tax Free event.

- **STEP 8 - Options > System > Preferences > Local Preferences > Stores > General**

Change the **Tax Area** to HOLIDAY (or whichever name you chose to use) for the specific store involved > **Update**.



CONCLUSION:

Using the following image you can verify that the HOLIDAY Tax Area and the HOLIDAY Tax Codes are taking effect.

NOTE: To more easily demonstrate we have added the Tax \$ and Tax (code) columns to display the results.

- **STEP 9 - Sales > Receipts > New Enter Tax Free Item followed by a taxable Item.**

Notice that the item with the HOLIDAY Tax Code displays 0.00 dollars whereas the item with the TAXABLE Tax Code displays the dollar amount being taxed.

The screenshot displays the Retail Pro software interface for creating a receipt. The main window is titled "Retail Pro" and shows a receipt entry screen for "Sub: 001 From: 10/1/2013 To: 10/13/2013".

Customer Information:

- Bill To Customer Lookup
- Bill To Full Name
- Bill To Customer ID: 0
- Bill To Phone 1

Receipt Information:

- Receipt Type: Regular
- Receipt #: 0
- Sales Order #: ONE
- Cashier: ONE

Items Table:

Lookup	Local UPC	DCS	Desc1	Attr	Size	Rcpt Price	Qty	Ext Rcpt Price	Doc Disc%	Tax\$	Tax	Disc%
000000000142	B		OTHER	L	20	50.00	1	50.00	0.00	0.00	HOLIDAY	0.00
000000000133	A		PI TEST ITEM	B	3	50.00	1	50.00	0.00	3.13	TAXABLE	0.00

Receipt Summary:

- Subtotal: 100.00
- Total Tax \$: 3.13
- Discount %: 0.00
- Fee Name: ...
- Receipt Total: **103.13**

The interface also includes buttons for "Remove Item", "Return Item", "Void Item", "Break Kit", and "Tender". The status bar at the bottom indicates "User: one | Database: RPRODDS | Workstation: 1 | Last Shortcut: TRIAL MODE [19 Days Remaining] | Pr: PrLv1 None".

At the end of the tax free event

- **STEP 10 - Options > System Preferences > Local Preferences > Stores > General** and change the stores **Tax Area** back to TAXABLE.
- By using the **Tax Code** method for certain items once you revert back to TAXABLE Tax Area, all items with the HOLIDAY Tax Code will again start collecting the usual tax.

THAT IS ALL!