

Contents

1.	Maintain Master File	2
1.1	Set new tax rate with effective date in 020BB.Tax	2
1.2	Create a new Tax ID with 7%	2
2.	Examples	3
2.1	Both SO and DO in 2023.....	3
2.2	SO in 2022 and DO in 2023	3
2.3	DO in 2022 and Invoice in 2023	5
2.4	DO in 2022 and Customer Return in 2023	6

1. Maintain Master File

1.1 Set new tax rate with effective date in 020BB.Tax

- 1) Tax rate will **auto display as 8%** for all documents created after 1.1.2023 like Quotation / Sales Order / Delivery Planning / Delivery Order / Invoice / Credit Note / Debit Note
- 2) System will **auto refresh tax rate as 8%** when copy from source document created before 1.1.2023
- 3) Tax Name need to update if the original tax name indicate tax rate

722 | [Site: 0] [Administrator @ EPB TEST COMMUNITY] [EPB TEST COMMUNITY]

Tax [Admin @ EPB TEST COMMUNITY] [020BB. TAX]

Search - Tax

☒ Generic Mode | Search

Tax

Table | Form | Duplicate | Add | Edit | Remove | Commit | Revert

#	* Tax ID	Name	Status...	* Tax Rate	Acc ID	Acc Na
1	OUTTAX7	OUTTAX8	Active	7.00	210400300	GST OU

EpTaxDtl

Table | Form | Duplicate | Add | Edit | Remove | Commit | Revert

#	* Tax ID	* Org ID	* Eft Date	* Tax Rate	Remarks
1	OUTTAX7	01	2023-01-01	8.00	

1.2 Create a new Tax ID with 7%

- 1) User can use the new tax id if receive invoice of 7% or need to issue invoice in 7% tax

rate

- 2) The new tax id is only for document generated after 1.1.2023 but need to follow the old tax rate

Tax [Admin @ EPB TEST COMMANY] [020BB. TAX]

Search - Tax

Generic Mode | Search

Tax

Table Form Duplicate Add Edit Remove Commit Revert

#	* Tax ID	Name	Status...	* Tax Rate	Acc ID	Acc Name	Tax Type	Tax Fl
1	INTAX0	INTAX0	Active	0.00	210400200	GST INPUT TAX	Input Tax	Claima
2	INTAX7	INTAX7	Active	7.00	210400200	GST INPUT TAX	Input Tax	Claima
3	OUTTAX0	OUTTAX0	Active	0.00	210400300	GST OUTPUT TAX	Output Tax	Claima
4	OUTTAX7	OUTTAX7	Active	7.00	210400300	GST OUTPUT TAX	Output Tax	Claima
5	OUTTAX7x	OUTTAX7	Active	7.00	210400300	GST OUTPUT TAX	Output Tax	Claima

2.Examples

2.1 Both SO and DO in 2023

- 1) Tax rate will auto display as 8% when SO date is later than 1.1.2023

Sales Order [Admin @ EPB TEST COMMANY] [060CBa. SON]

Action Function Batch B2B Quick Access: Post

Somas

+ Add Edit Commit Revert Refresh Print Functions

Doc ID: Doc Date: 2023-01-01

Cust ID: EPB-C002 DEALER CUSTOMER Status Flg: Active

Curr ID: SGD 1.0000 User ID: Admin Administrator

Tax ID: OUTTAX7 8.00 Emp ID: 00C Office

Price Incl Tax: No Dept ID: Proj ID:

Our Ref:

Line Ref SomasPayment

Table Form Duplicate Add Remove Functions

#	Line No.	Line Type	Stk ID	* Name	* List Price	* UOM Qty	UOM	U
---	----------	-----------	--------	--------	--------------	-----------	-----	---

- 2) DO/Invoice will follow same Tax Rate with SO

2.2 SO in 2022 and DO in 2023

- 1) Tax Rate in SO will remain as 7%

Sales Order [Admin @ EPB TEST COMMANY] [060Cba.SON]

Action Function Batch B2B Quick Access: Post

Somas

Doc ID: TS022090001 Doc Date: 2022-09-23

Cust ID: EPB-C002 DEALER CUSTOMER Status Flg: Posted

Curr ID: SGD 1.0000 User ID: Admin Administrator

Tax ID: OUTTAX7 7.00 Emp ID: 00C Office

Price Incl Tax: No Dept ID: Proj ID:

Our Ref:

#	Line No.	Line Type	Stk ID	* Name	* List Price	* UOM Qty	UOM	UOM Ratio	* Stk Qty
1	1.00	Stock Item	QQF00001	1000 ML PP RECT CONTAINER 10 X ...	5.00	10.00	PKT	1.00	10.00

Total Stock Quantity: 10.00 Grand Total: 53.50 Total Net: 50.00 Total Tax: 3.50

2) System will refresh Tax Rate as 8% when copy SO to DO if DO date is later than 1.1.2023

922) [Site: 8] [Administrator @ EPB TEST COMMANY] [EPB TEST COMMANY]

Delivery Order [Admin @ EPB TEST COMMANY] [060CE.DN]

Search - Delivery Order

Doc ID: Like Doc Date: >= 2022-09-24

Cust ID: =

Loc ID: = 01

Dattn To: =

Copy From SO

Search - Sales Order

Doc ID: Like Doc Date: >= 2022-09-23

Cust ID: = Loc ID: = 01

Curr ID: = Status Flg: = Posted

Cust Ref: Like User ID: =

Copy Date

Date for the new document(s): 2023-01-01

#	Doc ID	Doc Date	Status Flg	Cust ID
1	TS022090001	2022-09-23	Posted	EPB-C002

Copy SO To DO

Delivery Order Admin @ EPB TEST COMMANY [060CEa.DNN]

Action Function Batch Quick Access: Post Lock

Doc ID: TD022010001 Doc Date: 2023-01-01

Cust ID: EPB-C002 DEALER CUSTOMER Status Flg: Active

Attn: User ID: Admin Administrator

Curr ID: SGD 1.0000 Emp ID: 00C Office

Tax ID: OUTTAX7 8.00 Dept ID:

#	Li...	Stk ID	* Name	Model	* UOM Qty	UOM	UOM Ratio	* Stk Qty	UOM ID	* Lis
1	1.00	QQF00001	1000 ML PP RECT CONTAINER...		10.00	PKT	1.00	10.00	PKT	

Total Stock Quantity: 10.00 Grand Total: 54.00 Total Net: 50.00 Total Tax: 4.00

Batch

#	Li...	* UOM Qty	UOM	UOM Ratio	* Stk Qty	UOM ID	Batch ID1	Batch ID2	Batch ID3	Batch ID4
---	-------	-----------	-----	-----------	-----------	--------	-----------	-----------	-----------	-----------

Tax Rate will auto refreshed as 8%

- 3) Invoice will follow same Tax Rate with DO

2.3 DO in 2022 and Invoice in 2023

- 1) Tax Rate in DO will remain as 7%

221 [Site: 81 Administrator @ EPB TEST COMMANY | EPB TEST COMMANY]

Delivery Order Admin @ EPB TEST COMMANY [060CEa.DNN]

Action Function Batch Quick Access: Post Lock

Doc ID: TD022080002 Doc Date: 2022-08-31

Cust ID: EPB-C002 DEALER CUSTOMER Status Flg: Posted

Attn: User ID: Admin Administrator

Curr ID: SGD 1.0000 Emp ID: 00C Office

Tax ID: OUTTAX7 7.00 Dept ID:

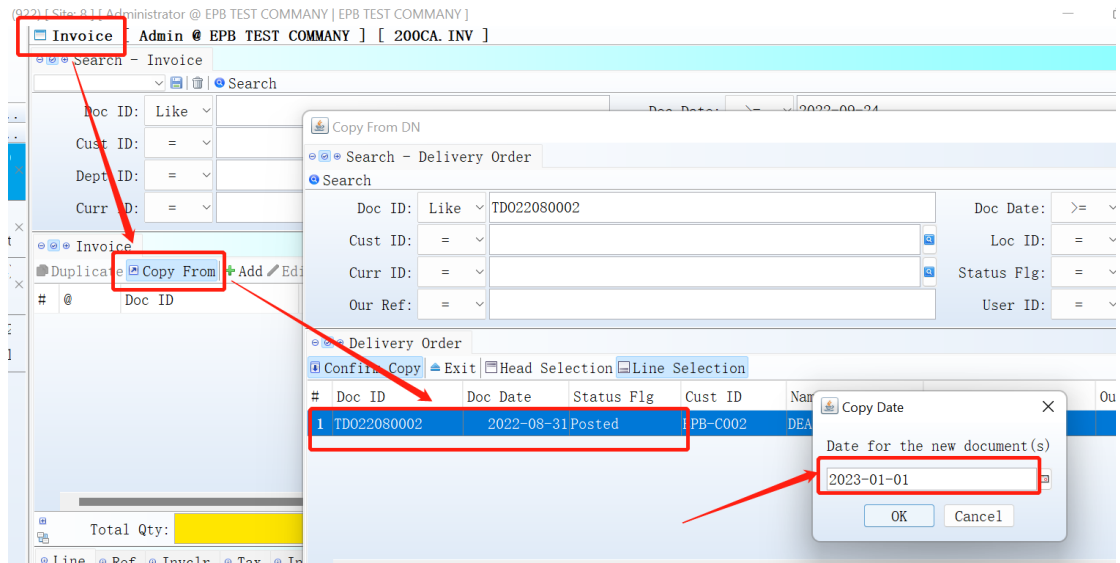
#	Li...	Stk ID	* Name	Model	* UOM Qty	UOM	UOM Ratio	* Stk Qty	UOM ID	* List ...	Di...	* ...
1	1.00	QQF00001	1000 ML PP RECT CONTAINER...		10.00	PKT	1.00	10.00	PKT	5.00	0%	0.00

Total Stock Quantity: 10.00 Grand Total: 53.50 Total Net: 50.00 Total Tax: 3.50

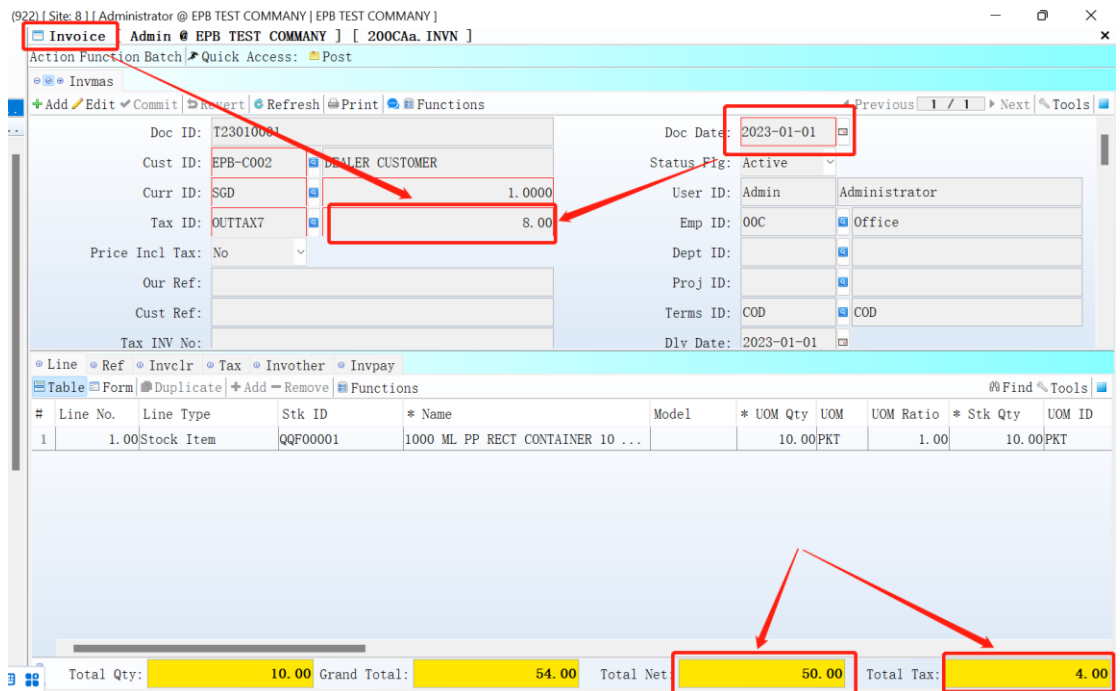
Batch

#	Li...	* UOM Qty	UOM	UOM Ratio	* Stk Qty	UOM ID	Batch ID1	Batch ID2	Batch ID3	Batch ID4
---	-------	-----------	-----	-----------	-----------	--------	-----------	-----------	-----------	-----------

- 2) System will refresh Tax Rate as 8% when copy DO to Invoice if Invoice date is later than 1.1.2023



Copy DO To Invoice



Tax Rate will auto refreshed as 8%

2.4 DO in 2022 and Customer Return in 2023

- 1) Tax Rate in DO will remain as 7%

22) [Site: 81] Administrator @ EPB TEST COMMANY | EPB TEST COMMANY]

Delivery Order [Admin @ EPB TEST COMMANY] [060CEa.DNN]

Action Function Batch: Quick Access: Post Lock

Doc ID: TD022080002 Doc Date: 2022-08-31

Cust ID: EPB-C002 DEALER CUSTOMER Status Flg: Posted

Attn: User ID: Admin Administrator

Curr ID: SGD 1.0000 Emp ID: 00C Office

Tax ID: OUTTAX7 7.00 Dept ID:

#	Li...	Stk ID	* Name	* UOM Qty	UOM	UOM Ratio	* Stk Qty	UOM ID	* List ...	Di...	* ...
1	1.00	QQF00001	1000 ML PP RECT CONTAINER...	10.00	PKT	1.00	10.00	PKT	5.00	0%	0.00

Total Stock Quantity: 10.00 Grand Total: 53.50 Total Net: 50.00 Total Tax: 3.50

#	Li...	* UOM Qty	UOM	UOM Ratio	* Stk Qty	UOM ID	Batch ID1	Batch ID2	Batch ID3	Batch ID4
---	-------	-----------	-----	-----------	-----------	--------	-----------	-----------	-----------	-----------

- 2) System will refresh Tax Rate as 8% when copy DO to Customer Return Note if return date is later than 1.1.2023, account can manually change Tax ID to the new Tax ID if need to follow DO tax rate

22) [Site: 81] Administrator @ EPB TEST COMMANY | EPB TEST COMMANY]

Customer Return [Admin @ EPB TEST COMMANY] [060CG.RNC]

Search - Customer Return

Doc ID: Like > Doc Date: >= 2022-09-24

Cust ID: = > Status Flg: = >

DAttn To: = >

DAddr Name: = >

Copy From DN

Search - Domas

Doc ID: Like > Doc Date: >

Cust ID: = > Loc ID: =

Curr ID: = > Status Flg: =

Emp ID: = > User ID: =

Confirm Copy Exit Head Selection Line Selection

#	Doc ID	Doc Date	St	Qu	Name	Cu...
1	TD022080002	2022-08-31	Posted	EPB...	DEA...	1.000

Copy Date

Date for the new document(s)

2023-01-01

OK Cancel

Copy DO To Customer Return

Customer Return [Admin @ EPB TEST COMMANY] [060CGa.RNCN]

Doc ID: T23010001 Doc Date: 2023-01-01

Cust ID: EPB-C002 DEALER CUSTOMER Status Flg: Active

Attn: User ID: Admin Administrator

Curr ID: SGD 1.0000 Emp ID: OOC Office

Tax ID: OUTTAX7 8.00 Dept ID: Terms ID: COD COD

Price Incl Tax: No Proj ID: Disc Char: 0% 0.00

Cust Ref: LumpSum Disc: 0.00

Our Ref: Dly Date: 2022-08-31

#	Li...	Li...	PL...	St...	*...	Model	*...	UOM	UO...	*...	UO...	*...	Di...	*...	Re...	Co...	*...	Un...	Vo...	Re...	St...
1	1.00	Sto...	QQF...	QQF...	100...			10.00PKT	1.00	10.00PKT			5.000%		5.00			0.00	0.00KG	1.00	KIN...

Total Net: 50.00 Total Tax: 4.00 Grand Total: 54.00

Tax Rate will auto refreshed as 8%

Customer Return [Admin @ EPB TEST COMMANY] [060CGa.RNCN]

Doc ID: T23010001

Cust ID: EPB-C002 DEALER CUSTOMER

Attn:

Curr ID: SGD

Tax ID: OUTTAX7

Price Incl Tax: No

Cust Ref:

Our Ref:

Dly Date: 2022-08-31

Tax ID

#	Tax ID	Name
1	OUTTAX7	OUTTAX7
2	OUTTAX7x	OUTTAX7

Change Tax ID

9221 Site: 811 Administrator @ EPB TEST COMMANY | EPB TEST COMMANY]

Customer Return [Admin @ EPB TEST COMMANY] [060CGa. RNCN]

Action Function Batch Quick Access: Post

Rncmas

+ Add Edit Commit Revert Refresh Print Functions

Doc ID: T23010001 Doc Date: 2023-01-01

Cust ID: EPB-C002 DEALER CUSTOMER Status Flg: Active

Attn: User ID: Admin Administrator

Curr ID: SGD 1.0000 Emp ID: 00C Office

Tax ID: OUTTAX7x 7.00 Dept ID: Terms ID: COD

Price Incl Tax: No Proj ID: Disc Char: 0% 0.00

Cust Ref: LumpSum Disc: 0.00

Our Ref: Remarks:

Dly Date: 2022-08-31

Tax INV No:

Line Ref Tax

Table Form Duplicate Add Remove Functions Find Tools

#	Li...	Li...	PL...	St...	* ...	Model	* ...	UOM	UO...	* ...	UO...	* ...	Di...	* ...	Re...	Co...	* ...	Un...	Vo...	Re...	St...
1	1.00	Sto...	QQF...	QQF...	100...			10.00	PKT	1.00	10.00	PKT	5.00	0%	5.00	0.00	0.00	KG	1.00		KIN...

Total Net: 50.00 Total Tax: 3.50 Grand Total: 53.50

Batch