

# **TALLORDER SOLUTIONS**

# **ADDING MORE TAX TYPES**

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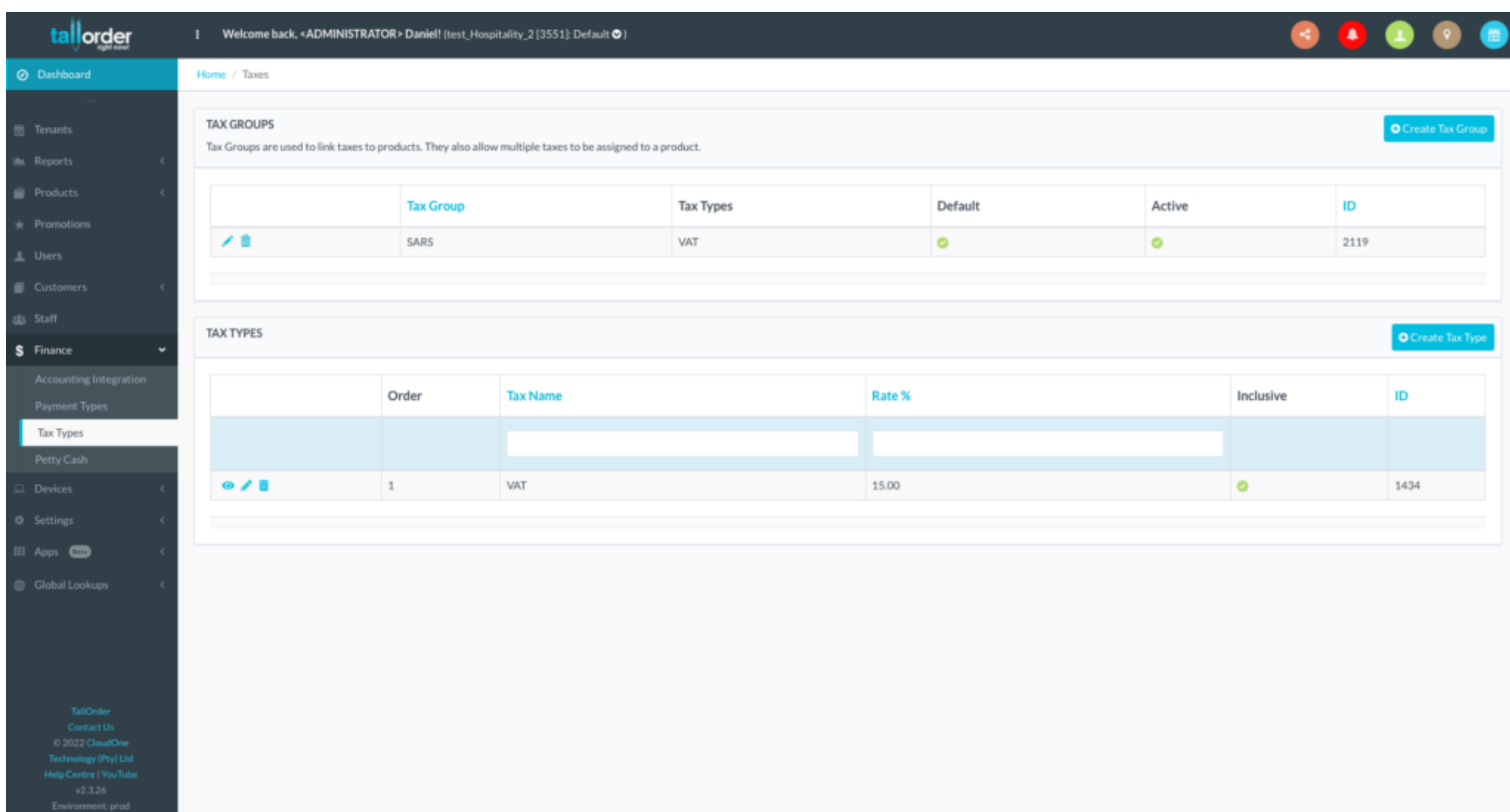
## Adding more Tax Types & Tax Groups

When logged into the merchant you have created, by default, the Tax Group you selected merchant setup will be added and enabled as default e.g. SARS Tax Group with VAT Tax Type set at 15% – to add more , the below steps can be followed.

A Tax Group is assigned to a product, a Tax Group can consist of one or more Tax Types can either be set as the **Default** tax group which will then automatically be added to each product created.

### Step 1




Click on **Finance** under the **Admin Nav Bar -> Finance -> Tax Types**





The screenshot shows the TallOrder Admin Panel interface. The left sidebar contains navigation options: Dashboard, Tenants, Reports, Products, Promotions, Users, Customers, Staff, Finance (selected), Accounting Integration, Payment Types, Petty Cash, Devices, Settings, Apps, and Global Lookups. The main content area is titled 'Home / Taxes' and displays two sections: 'TAX GROUPS' and 'TAX TYPES'.

**TAX GROUPS**

Tax Groups are used to link taxes to products. They also allow multiple taxes to be assigned to a product.

	Tax Group	Tax Types	Default	Active	ID
	SARS	VAT			2119

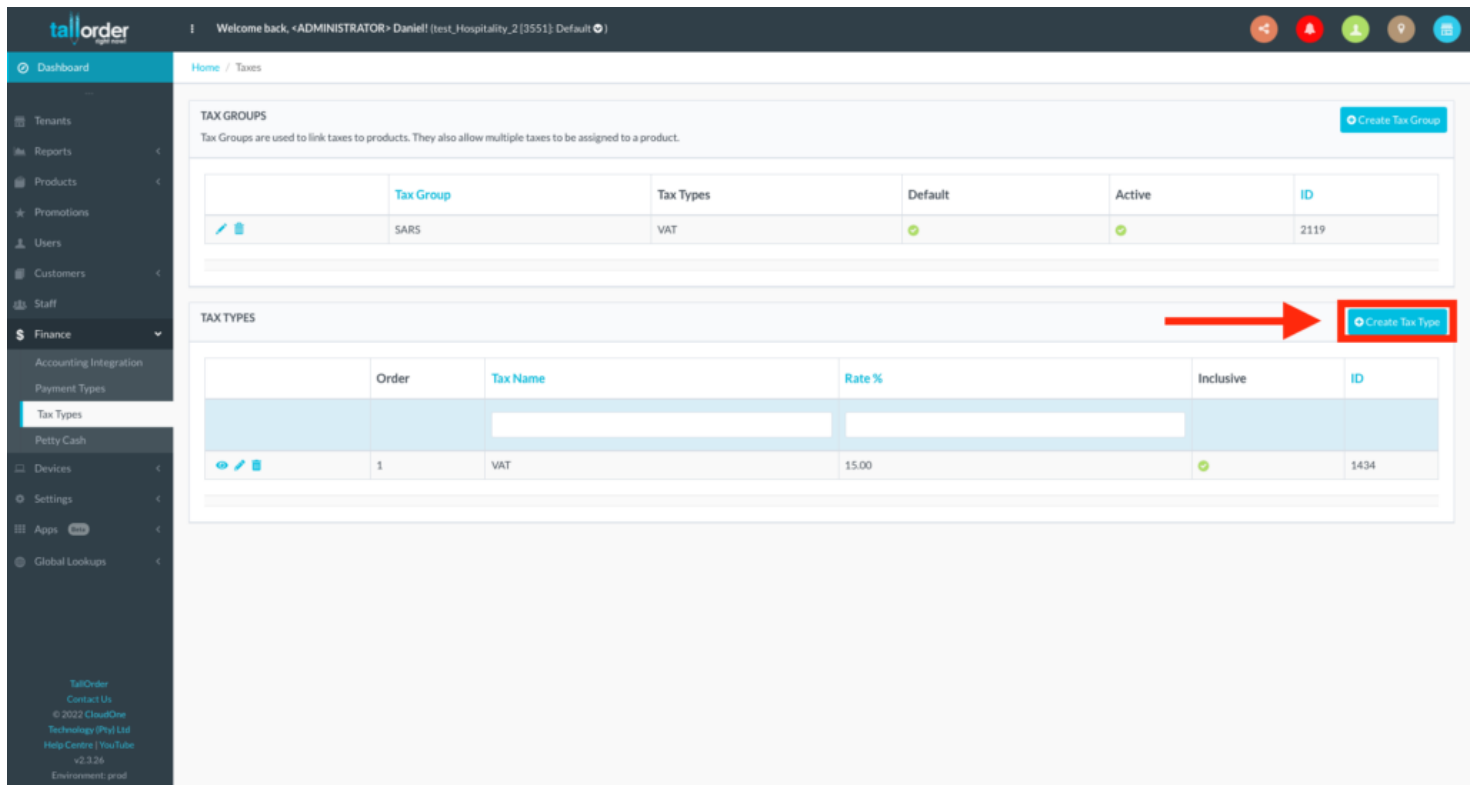
**TAX TYPES**

	Order	Tax Name	Rate %	Inclusive	ID
	1	VAT	15.00		1434

The bottom of the page shows the footer with contact information and version details: TallOrder, Contact Us, © 2022 CloudOne Technology (Pty) Ltd, Help Centre | YouTube, v2.3.26, Environment: prod.

### Step 2

Create a Tax Type by clicking on Create Tax Type



Home / Taxes

**TAX GROUPS**

Tax Groups are used to link taxes to products. They also allow multiple taxes to be assigned to a product.

	Tax Group	Tax Types	Default	Active	ID
	SARS	VAT	✓	✓	2119

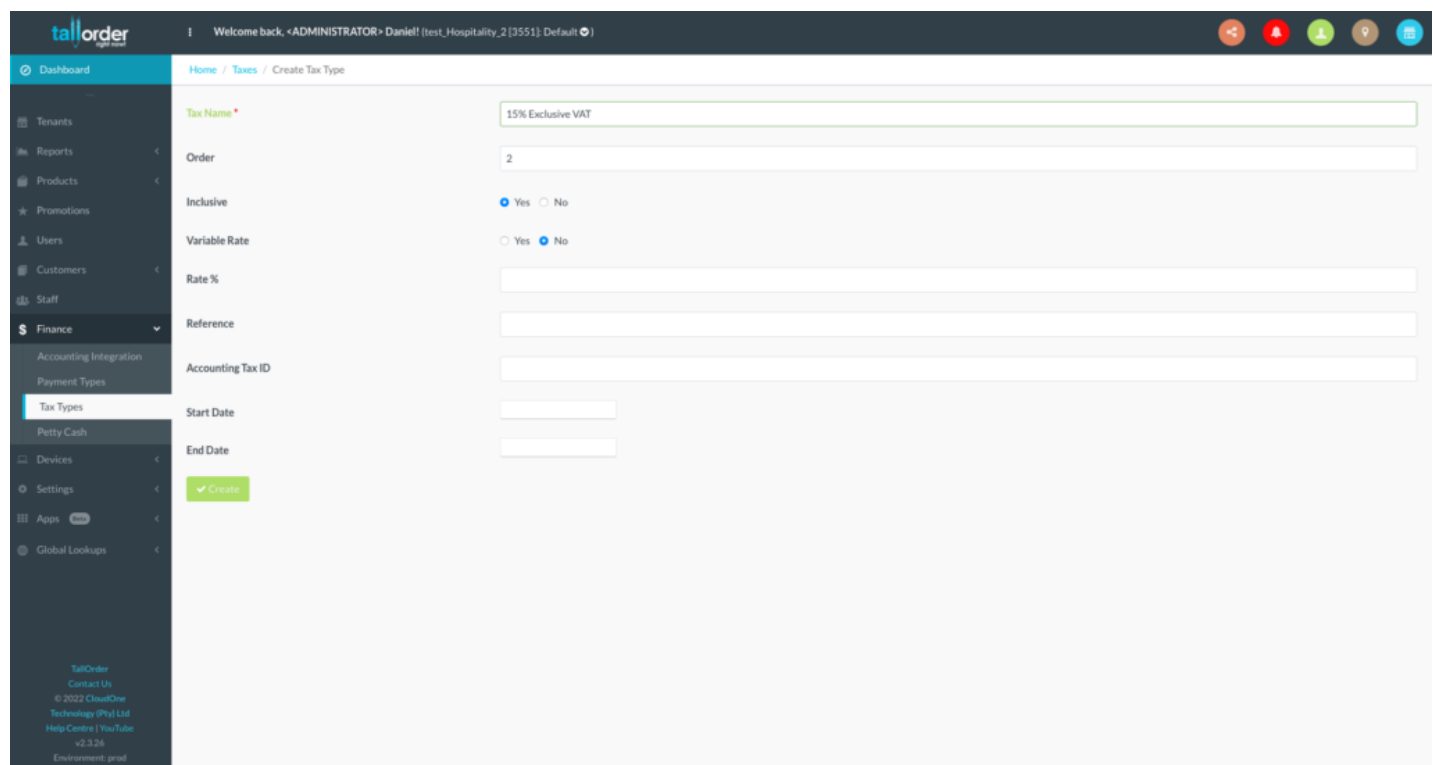
**TAX TYPES**

[Create Tax Type](#)

	Order	Tax Name	Rate %	Inclusive	ID
	1	VAT	15.00	✓	1434

## Step 3

Add a Tax Name for the Tax Type



Home / Taxes / Create Tax Type

**Tax Name \*** 15% Exclusive VAT

**Order** 2

**Inclusive** ☒ Yes ☐ No

**Variable Rate** ☐ Yes ☒ No

**Rate %**

**Reference**

**Accounting Tax ID**

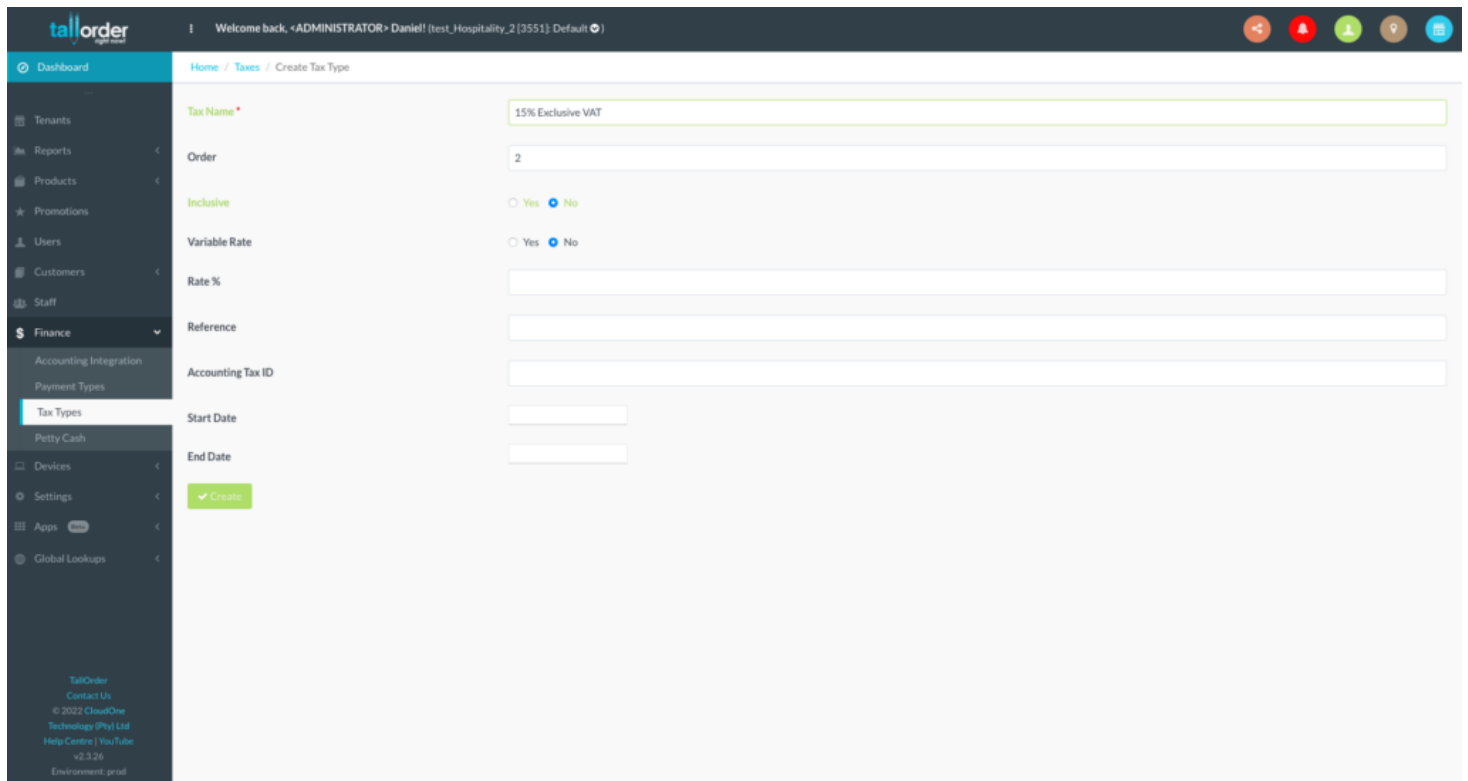
**Start Date**

**End Date**

[Create](#)

## Step 4

Select whether the Tax Type is **Inclusive (Inclusive set to Yes by default)** or **(Exclusive means set Inclusive to No)**



Dashboard / Home / Taxes / Create Tax Type

**Tax Name \*** 15% Exclusive VAT

**Order** 2

**Inclusive** ☐ Yes ☒ No

**Variable Rate** ☐ Yes ☒ No

**Rate %**

**Reference**

**Accounting Tax ID**

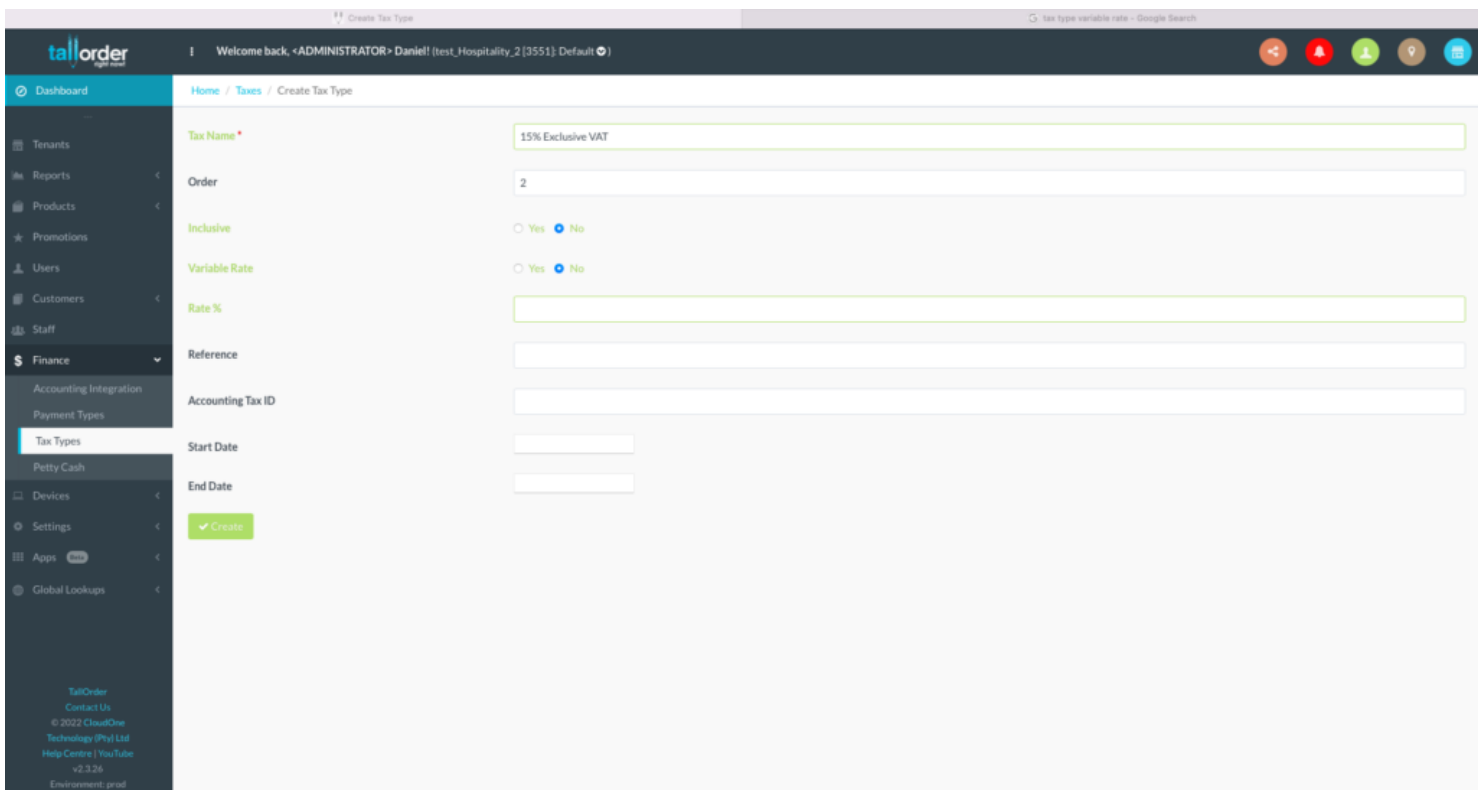
**Start Date**

**End Date**

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## Step 5

Leave **Variable Rate** set to No



Dashboard / Home / Taxes / Create Tax Type

**Tax Name \*** 15% Exclusive VAT

**Order** 2

**Inclusive** ☐ Yes ☒ No

**Variable Rate** ☐ Yes ☒ No

**Rate %**

**Reference**

**Accounting Tax ID**

**Start Date**

**End Date**

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## Step 6

Add a **Rate % / Tax Type Percentage**

Home / Taxes / Create Tax Type

**Tax Name \*** 15% Exclusive VAT

**Order** 2

**Inclusive** ☐ Yes ☒ No

**Variable Rate** ☐ Yes ☒ No

**Rate %** 15

**Reference**

**Accounting Tax ID**

**Start Date**

**End Date**

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## Step 7

A **Reference** can be added if required/desired – else leave blank

Home / Taxes / Create Tax Type

**Tax Name \*** 15% Exclusive VAT

**Order** 2

**Inclusive** ☐ Yes ☒ No

**Variable Rate** ☐ Yes ☒ No

**Rate %** 15

**Reference**

**Accounting Tax ID**

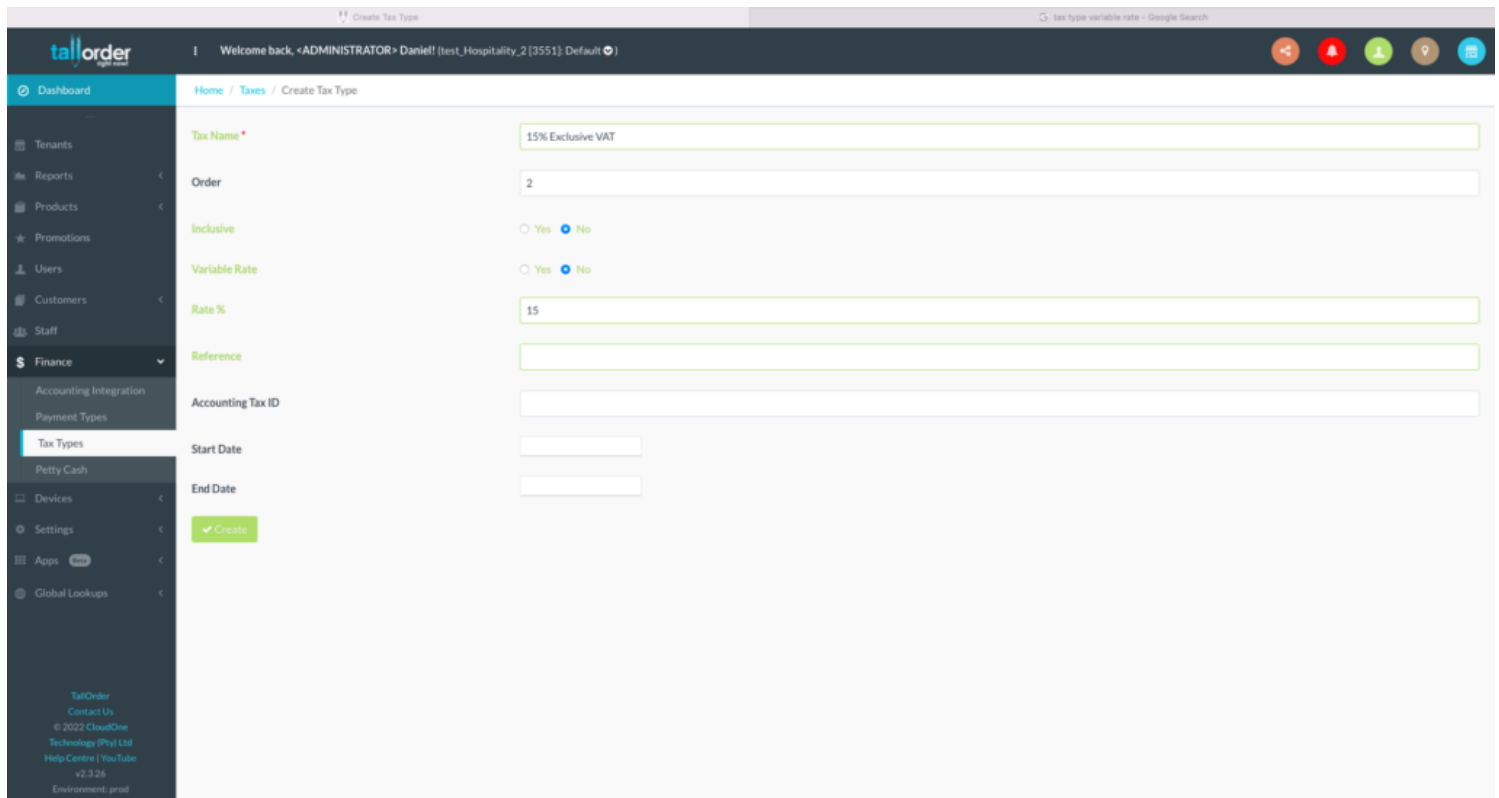
**Start Date**

**End Date**

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## Step 8

Acc  
manual filling is desired – else leave blank

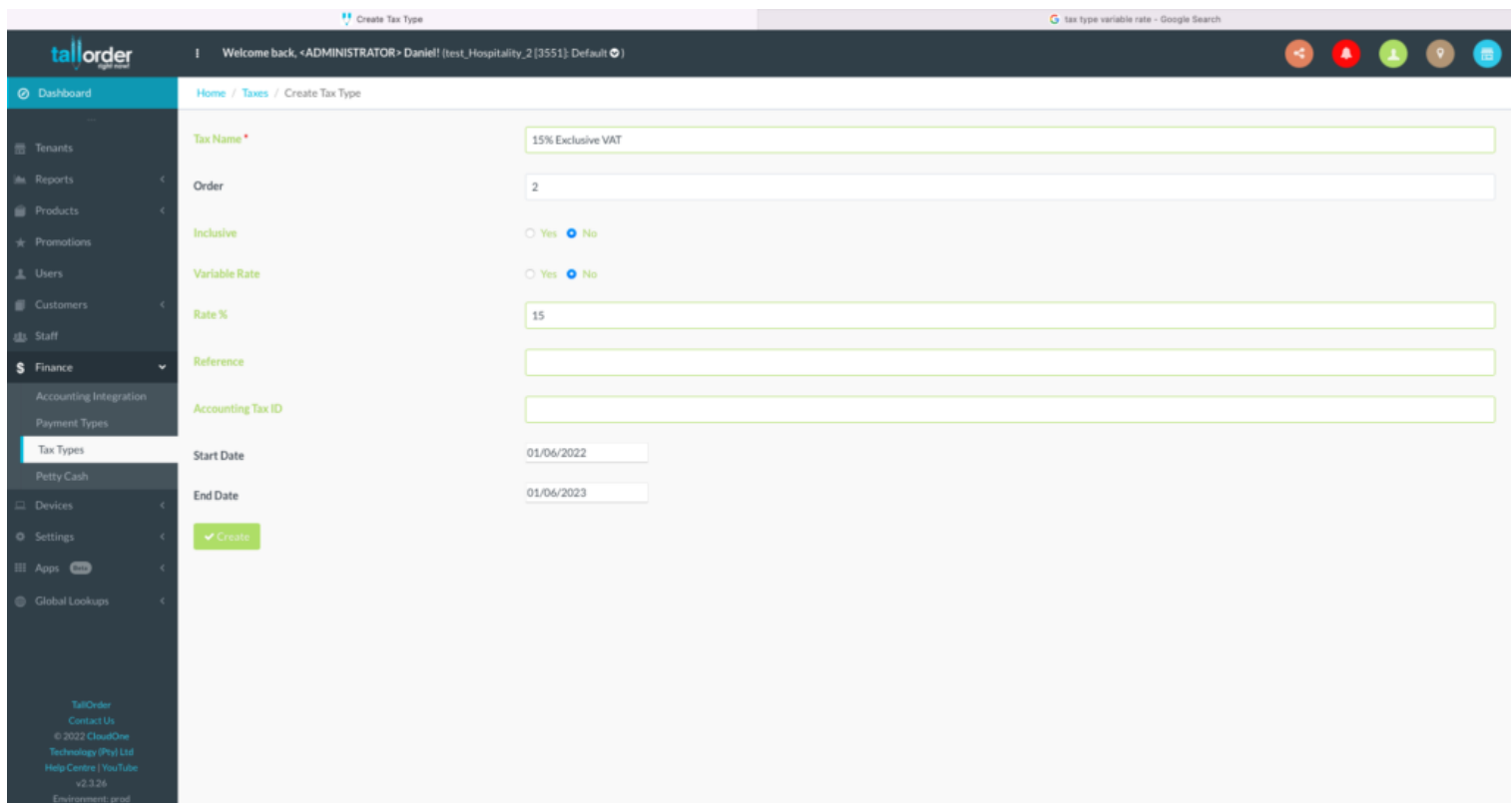


**Form Fields:**

- Tax Name: 15% Exclusive VAT
- Order: 2
- Inclusive: ☐ Yes ☒ No
- Variable Rate: ☐ Yes ☒ No
- Rate %: 15
- Reference: (empty)
- Accounting Tax ID: (empty)
- Start Date: (empty)
- End Date: (empty)
- Buttons:

## Step 9

**Start** and **End Dates** can be filled, which will be looked at by POS and applied to only if the date is between those dates – if outside, the tax type won't be applied



**Form Fields:**

- Tax Name: 15% Exclusive VAT
- Order: 2
- Inclusive: ☐ Yes ☒ No
- Variable Rate: ☐ Yes ☒ No
- Rate %: 15
- Reference: (empty)
- Accounting Tax ID: (empty)
- Start Date: 01/06/2022
- End Date: 01/06/2023
- Buttons:

## Step 10

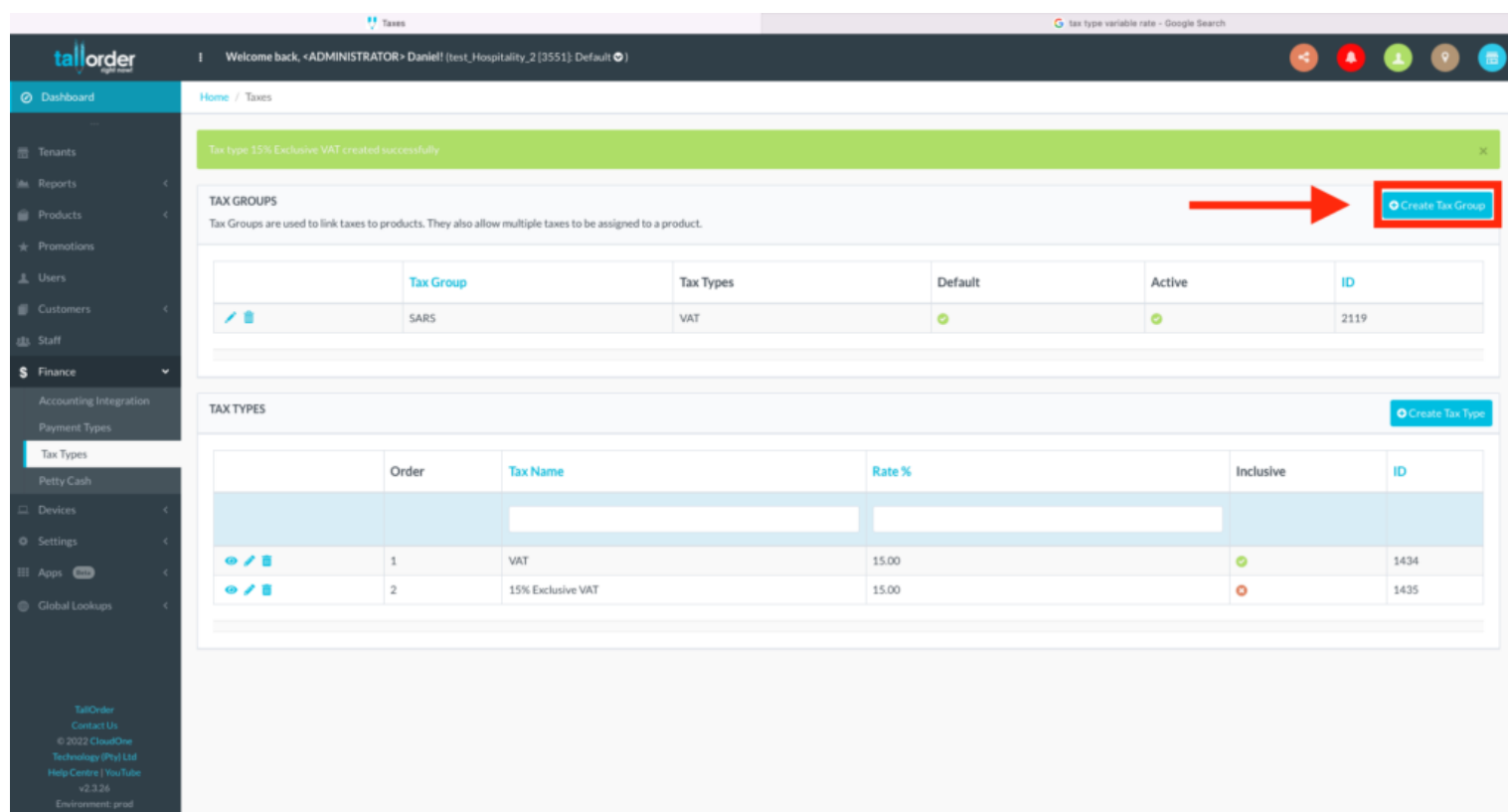
Click on the green **Create** button

## Step 11

To apply this Tax Type's to products, they have to be part of a Tax Group




You can either setup a new Tax Group or add the Tax Type to an existing Tax Group

To setup a new **Tax Group**, click on Create Tax Group







Tax type 15% Exclusive VAT created successfully

**TAX GROUPS**  
Tax Groups are used to link taxes to products. They also allow multiple taxes to be assigned to a product.

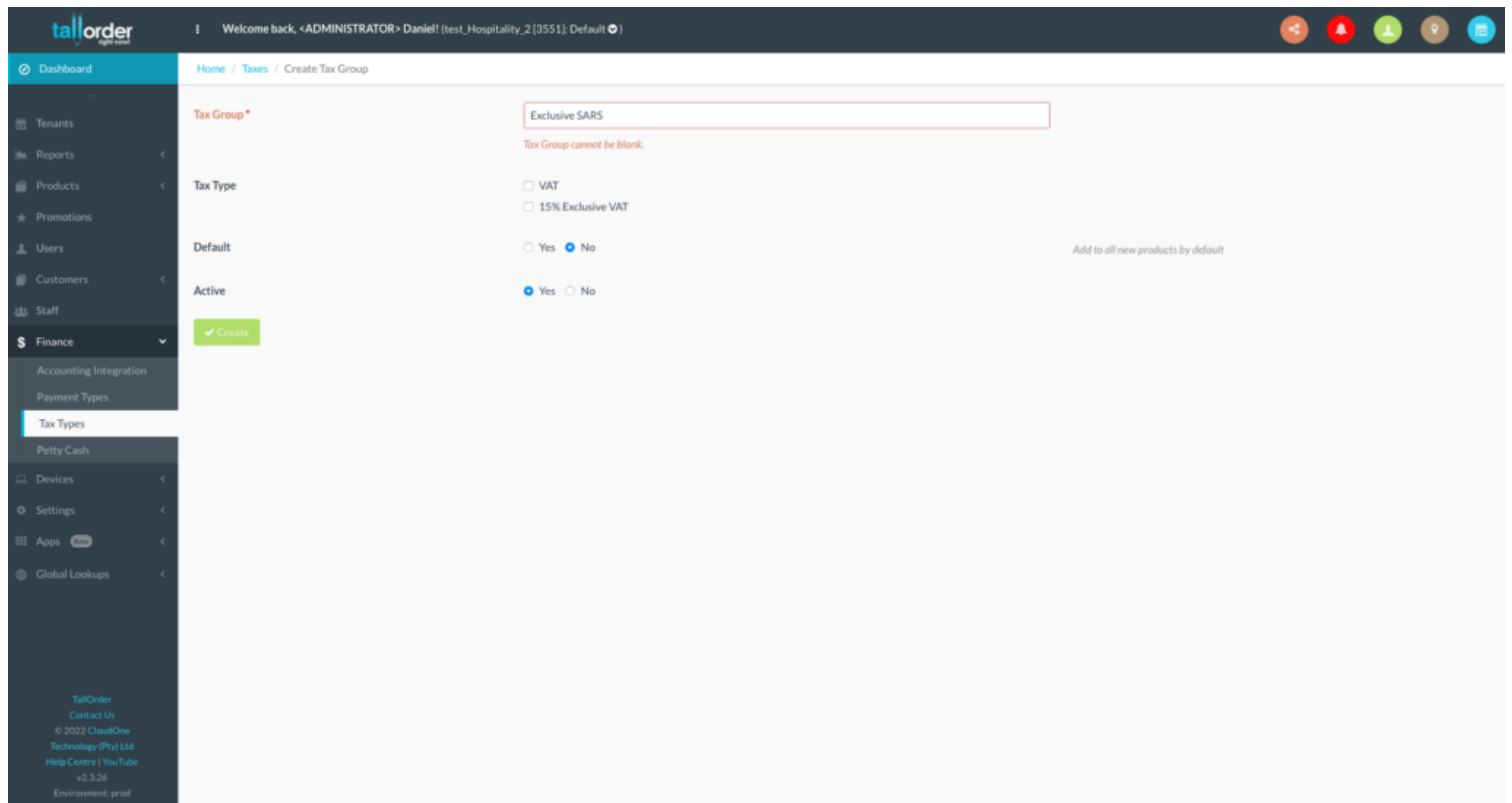
	Tax Group	Tax Types	Default	Active	ID
	SARS	VAT			2119

**TAX TYPES**

	Order	Tax Name	Rate %	Inclusive	ID
	1	VAT	15.00		1434
	2	15% Exclusive VAT	15.00		1435

## Step 12

Enter a **Tax Group** Name



Dashboard | Home / Taxes / Create Tax Group

**Tax Group \***

Tax Group cannot be blank.

**Tax Type**

☐ VAT

☐ 15% Exclusive VAT

**Default**

☐ Yes ☒ No

Add to all new products by default

**Active**

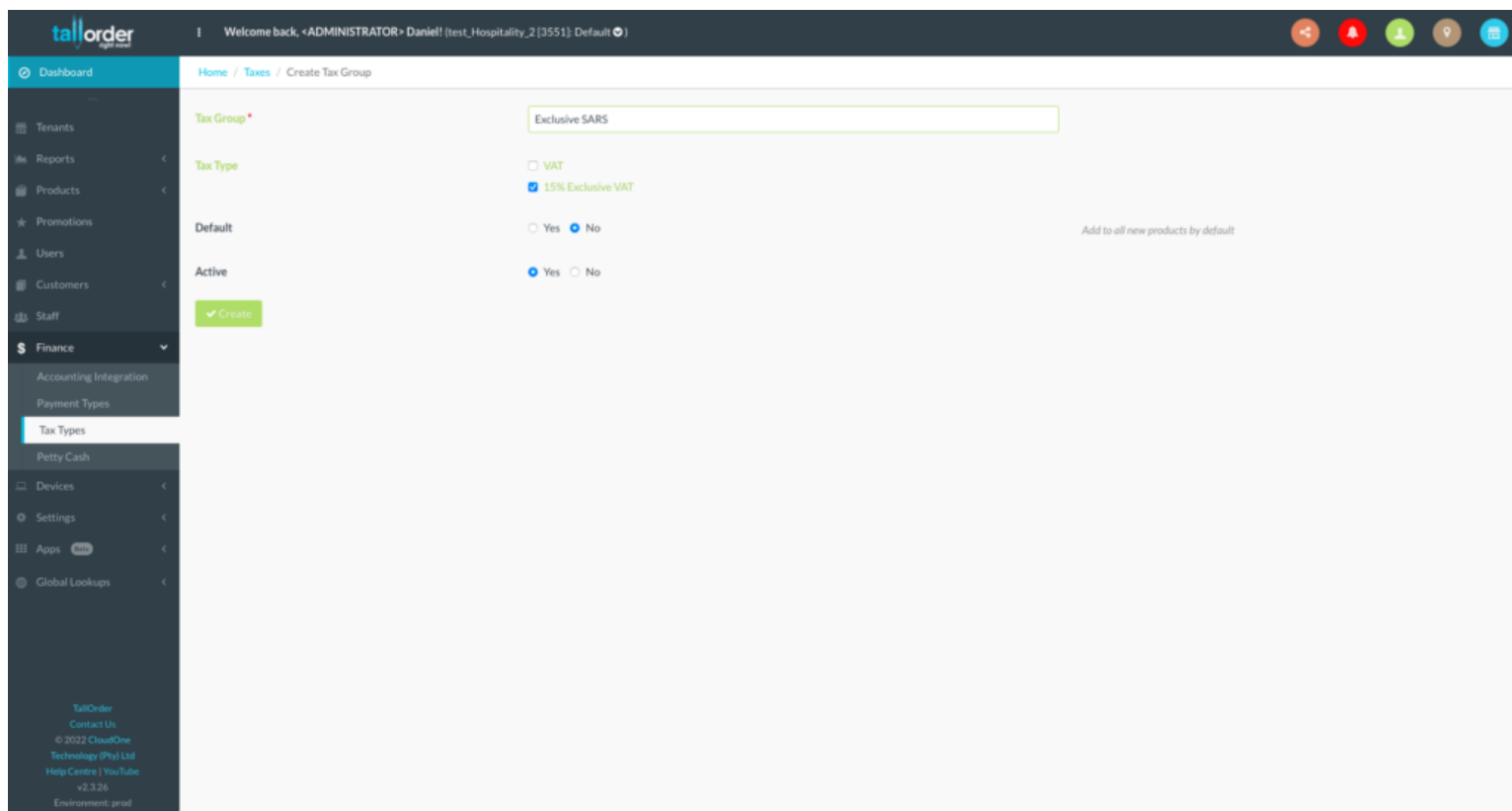
☒ Yes ☐ No

[Create](#)

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## Step 13

Tick the **Tax Type/s** that should be part of this **Tax Group**



Dashboard | Home / Taxes / Create Tax Group

**Tax Group \***

**Tax Type**

☐ VAT

☒ 15% Exclusive VAT

**Default**

☐ Yes ☒ No

Add to all new products by default

**Active**

☒ Yes ☐ No

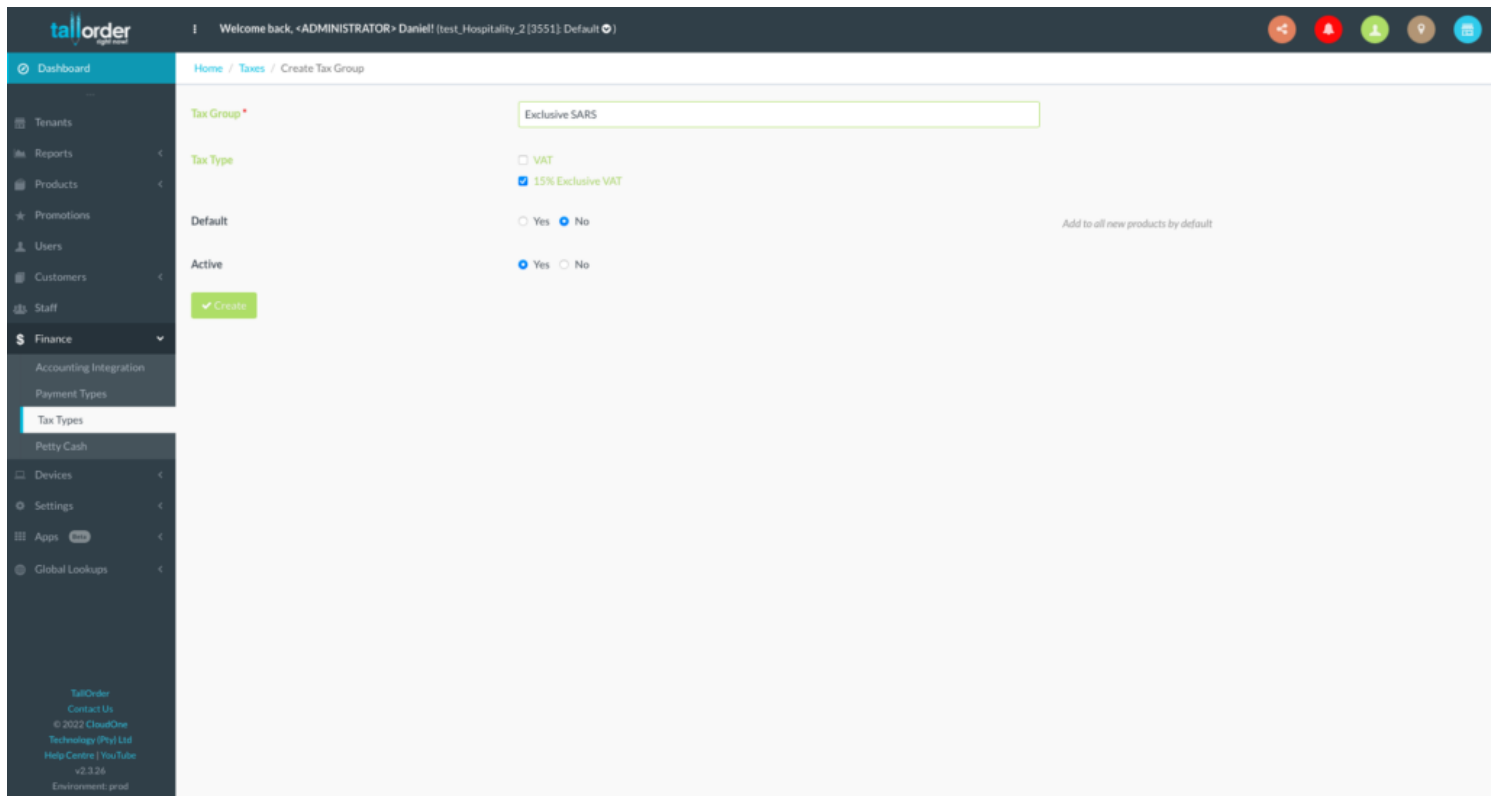
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## Step 14

Select whether the Tax Group should be **Default** for all new products being created





Dashboard | Home / Taxes / Create Tax Group

**Tax Group \***

**Tax Type**

☐ VAT

☒ 15% Exclusive VAT

**Default**

☐ Yes ☒ No Add to all new products by default

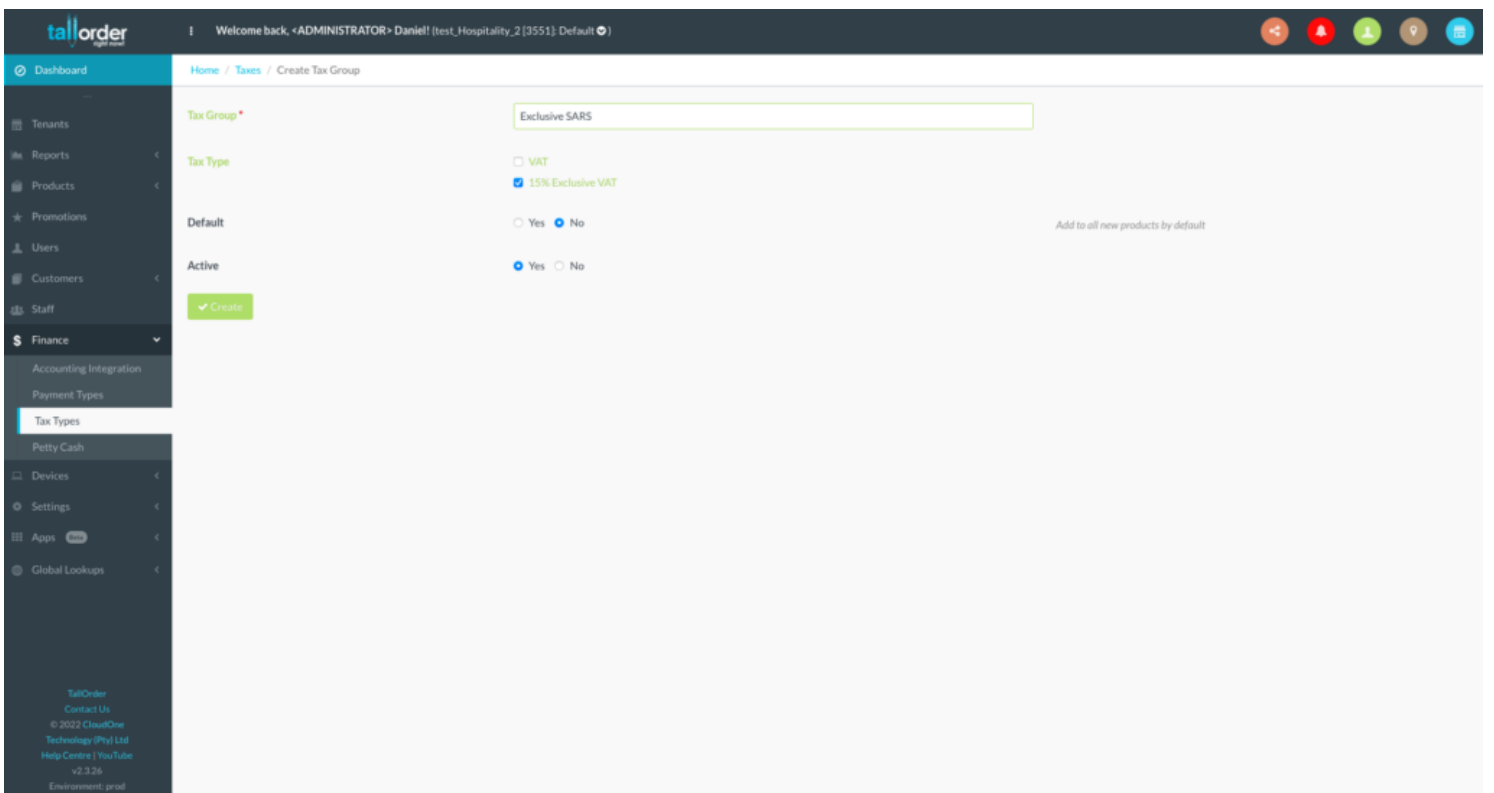
**Active**

☒ Yes ☐ No

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## Step 15

Enable or disable the Tax Group by making it **Active** by ticking **Yes** or not – it is defaulted to **Yes** and suggest leaving it there



Dashboard | Home / Taxes / Create Tax Group

**Tax Group \***

**Tax Type**

☐ VAT

☒ 15% Exclusive VAT

**Default**

☐ Yes ☒ No Add to all new products by default

**Active**

☒ Yes ☐ No

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## Step 16

Click on the green **Create** button