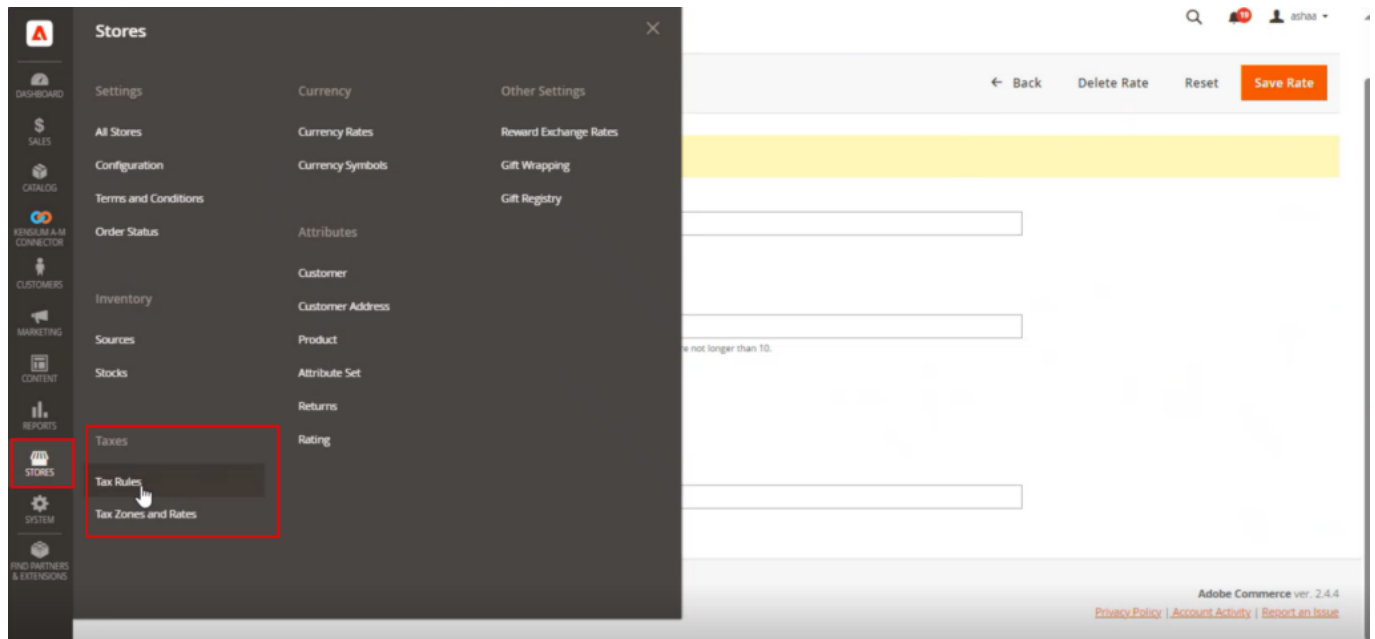


# Managing the Sync Order with Tax



Magento allows you to sync the order along with the Tax. You need to follow the steps as described.

Step 1: Go to the [Stores] on the left panel, you will be able to view [Tax Rules] and [Tax Zones and Rates] under Tax.



## Tax Rates and Tax Zones and Rates

Step 2: Click on the Tax Zones and Rates. You will be redirected to the following screen.






 ashaa ▾

[Add New Tax Rate](#)

**i** It's time to change your password.

Export to: CSV ▼ Export

Export

Search   Reset Filter   3 records found

20 per page 1 of 1

| Tax Identifier | Country       | State/Region | Zip/Post Code | Rate       |
|----------------|---------------|--------------|---------------|------------|
|                | All Countries |              |               | From<br>To |
| US-CA-*.Rate 1 | United States | CA           | *             | 8.2500     |
| US-MI-*.Rate 1 | United States | MI           | *             | 8.2500     |
| US-NY-*.Rate 1 | United States | NY           | *             | 8.3750     |

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Step 3: To create the New Tax Rate, you need to enter the following details.

- Tax Identifier (Mandatory): Enter the name of the Providence.
- Zip/Post is Range [Checkbox]
- Zip/ Postal Code: Enter the Zip or Postal Code
- State [Drop-down]
- Country [Drop-down]
- Rate Percent [Mandatory Text box]: Enter the applicable tax rate and save.

Step 4:



### New Tax Rate

← Back   Reset   **Save Rate**

It's time to change your password.

Tax Identifier \*

Zip/Post is Range ☐

Zip/Post Code \*   
\*\* - matches any; 'xyz\*' - matches any that begins on 'xyz' and are not longer than 10.

State

Country \*

Rate Percent \*

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Waiting for magento244beta4.kensiumcommerce.com...

Enter the details as per business requirement

### Tax Zones and Rates

**Add New Tax Rate**

It's time to change your password.

✓ You saved the tax rate.

Export to: CSV

Search [Reset Filter](#) 4 records found 20 per page 1 of 1

| Tax Identifier       | Country                                    | State/Region         | Zip/Post Code        | Rate   |
|----------------------|--|----------------------|----------------------|--|
| <input type="text"/> | <input type="text" value="All Countries"/> | <input type="text"/> | <input type="text"/> | From <input type="text"/><br>To <input type="text"/> |
| US-CA-*Rate 1        | United States                              | CA                   | *                    | 8.2500   |
| FL                   | United States                              | FL                   | 33629                | 7.5000   |
| US-MI-*Rate 1        | United States                              | MI                   |                      |  |
| US-NY-*Rate 1        | United States                              | NY                   |                      |  |

[https://magento244beta4.kensiumcommerce.com/admin/\\_kqwua/tax/rate/edit/rate/4/key/74da140fc8051fe9fd0b9ca9c1480fa87a190abf1358e1bfe43d7da6a4a0634a/](https://magento244beta4.kensiumcommerce.com/admin/_kqwua/tax/rate/edit/rate/4/key/74da140fc8051fe9fd0b9ca9c1480fa87a190abf1358e1bfe43d7da6a4a0634a/)

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Tax Zones and Rates

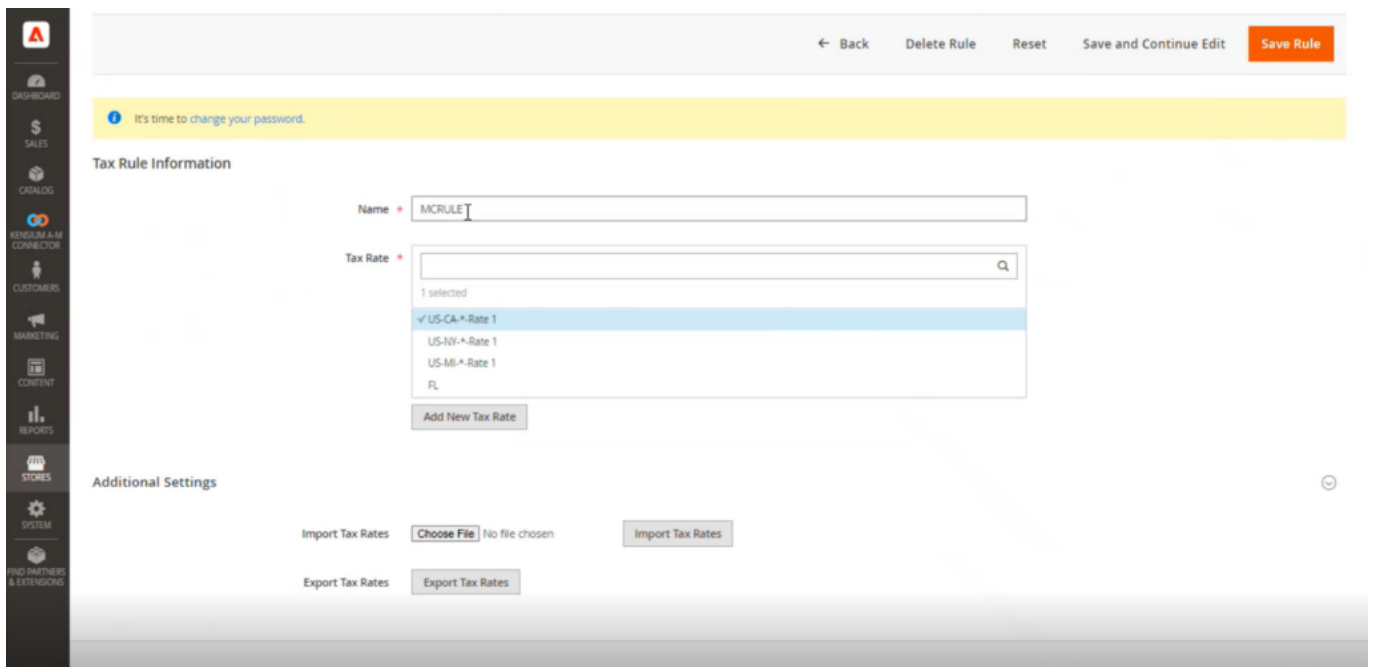


Note: If you give the Zip/Postal Code here only for that postal code Tax rate will be applied. If the Zip/Post code shows as\* this tax rate will be applied.



Step 5. You need to create the Tax Rule. You need to fill up the following fields to complete the rule.

- Name (Mandatory Tax Field)- Rule Name
- Tax Rate [Mandatory Drop-Down]: The tax rate which you have created in the tax zones will be populated in the dropdown. You need to select the applicable one. On the fly, you can create the Tax Rate by using [Add New Tax Rate].



The screenshot shows the 'Tax Rule Information' form. At the top, there is a navigation bar with buttons: Back, Delete Rule, Reset, Save and Continue Edit, and a prominent Save Rule button. Below this is a yellow banner with a message: 'It's time to change your password.' The form itself has two main sections. The 'Tax Rule Information' section contains a 'Name' field with the value 'MCRULE' and a 'Tax Rate' dropdown menu. The dropdown is open, showing a list of options: '1 selected', '✓ US-CA-^Rate 1', 'US-IL-^Rate 1', 'US-MI-^Rate 1', and 'FL'. Below the dropdown is an 'Add New Tax Rate' button. The 'Additional Settings' section at the bottom has buttons for 'Import Tax Rates' (with a 'Choose File' button and 'No file chosen' text) and 'Export Tax Rates'.


Enter the Tax Rate

### Additional Settings:

This section includes the following field which needs to be field.

- **Customer Tax Class [Mandatory dropdown]:** You need to select the Customer Tax Class. For example, Retail Customer or Wholesale customer. On the fly, you can add a new tax class from the [Add New Tax Class] option.
- **Product Tax Class:** If you click on the Kensium A-M connector you will have the option for Tax Category mapping. Here you need to select the Product Tax Classes which are mapped to the Acumatica Tax Category in the Tax Category Mapping Screen.





Dashboard

Sales

Catalog

Kiosk & A.M. Connector

Customers

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Partners & Extensions

## Tax Category Mapping

Scope: All Store Views

Update Schema

Map Tax Category

It's time to change your password.

Filters

Default View

Columns

Actions

2 records found

20 per page

1 of 1

|                          | Magento Tax Class | Acumatica Tax Category     | Store View      |
|--------------------------|-------------------|----------------------------|-----------------|
| <input type="checkbox"/> | TAXABLE           | Taxable Goods and Services | All Store Views |
| <input type="checkbox"/> | EXEMPT            | Exempt Tax Category        | All Store Views |


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## Tax Category Mapping

- **Priority {Mandatory Tax Field}:** You need to enter the priority and the sort order and save the rule.



DASHBOARD

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ORDERS

INTEGRATE A-M CONNECTOR

CUSTOMERS

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FIND PARTNERS & EXTENSIONS

MCRULE

← Back

Delete Rule

Reset

Save and Continue Edit

Save Rule

US-M\*-Rate 1

FL

Add New Tax Rate

Additional Settings

Customer Tax Class \*

✓ Retail Customer

✓ Wholesale Customer

Add New Tax Class

Product Tax Class \*

Taxable Goods

✓ TAXABLE

DEMOTAX

DEMOTAX

TAXONE

NEWTAX

TESTTAX

TAX50

TAX51

TAXABLE2

Add New Tax Class

Priority \*

1

The rules at the same priority are added, others are recommended

## Additional Settings Details