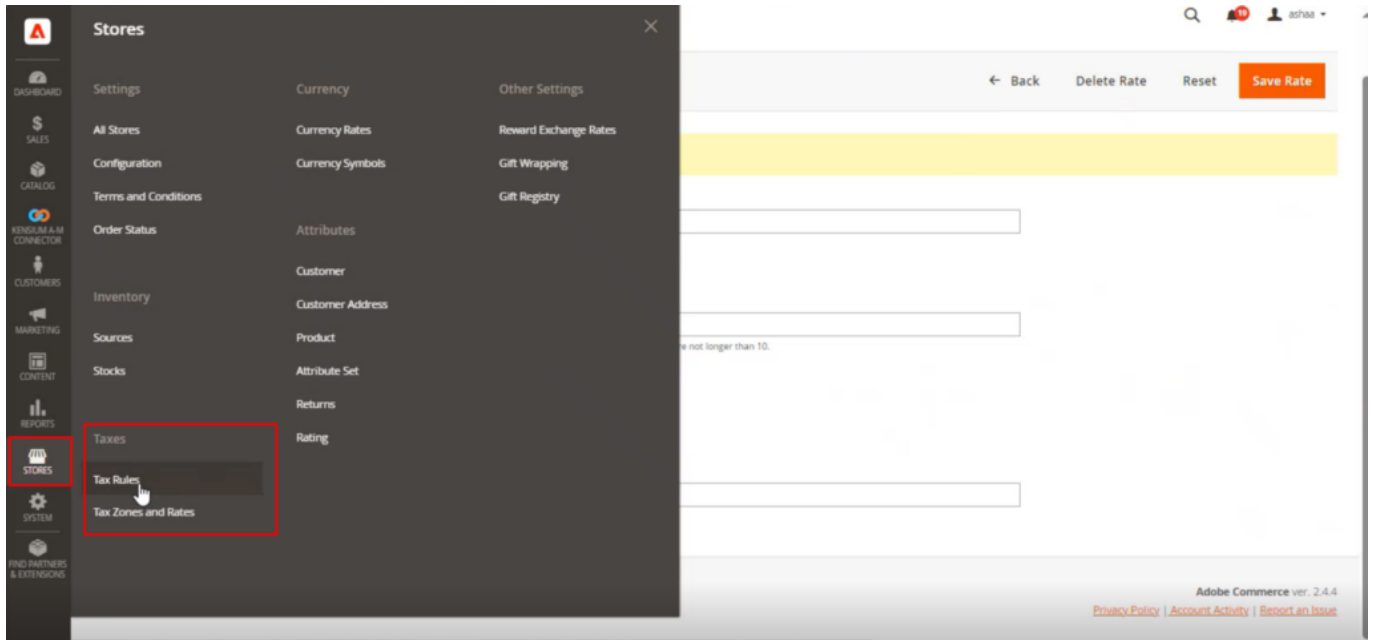


# Managing the Sync Order with Tax



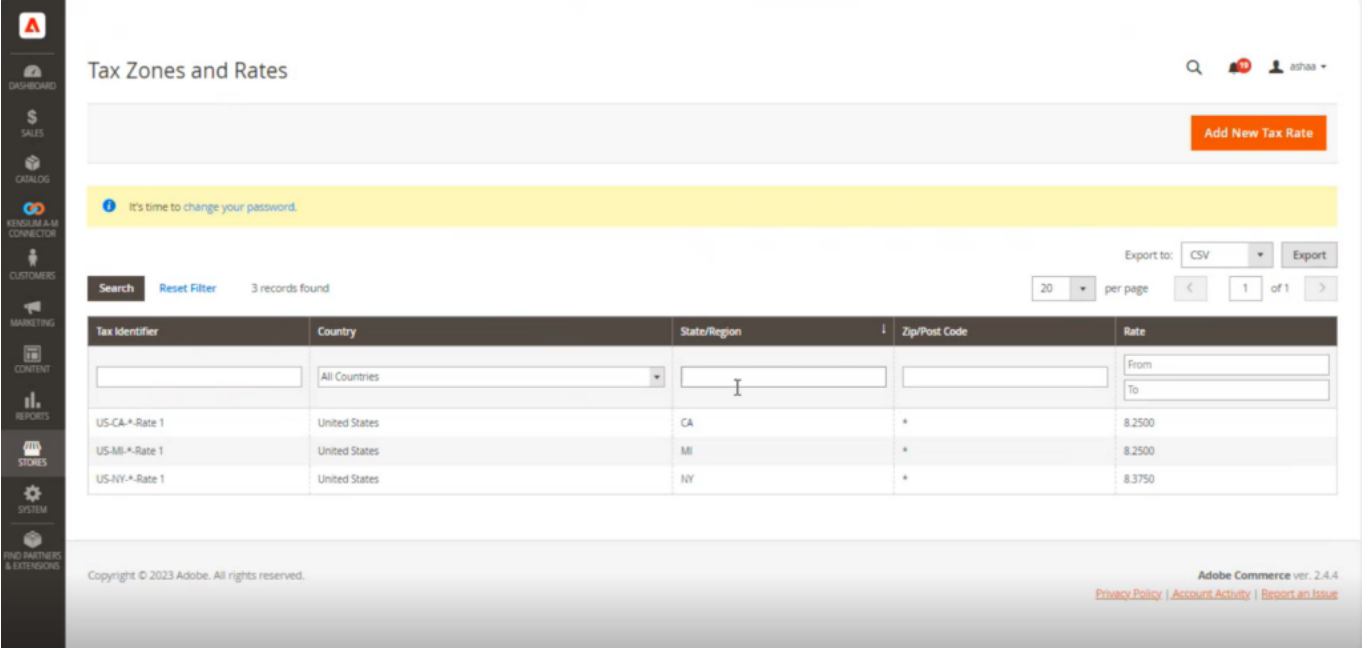
Magento allows you to sync the order along with the Tax. You need to follow the steps as described.

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.



**Tax Zones and Rates**

It's time to change your password.

Export to: CSV Export

20 per page 1 of 1

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

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### Option to Add New Tax Rate

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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Enter the details as per business requirement

### Tax Zones and Rates

Export to: CSV    Export

20 per page    1 of 1

Tax Identifier	Country	State/Region	Zip/Post Code	Rate
<input type="text"/>	All Countries	<input type="text"/>	<input type="text"/>	From <input type="text"/> 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		

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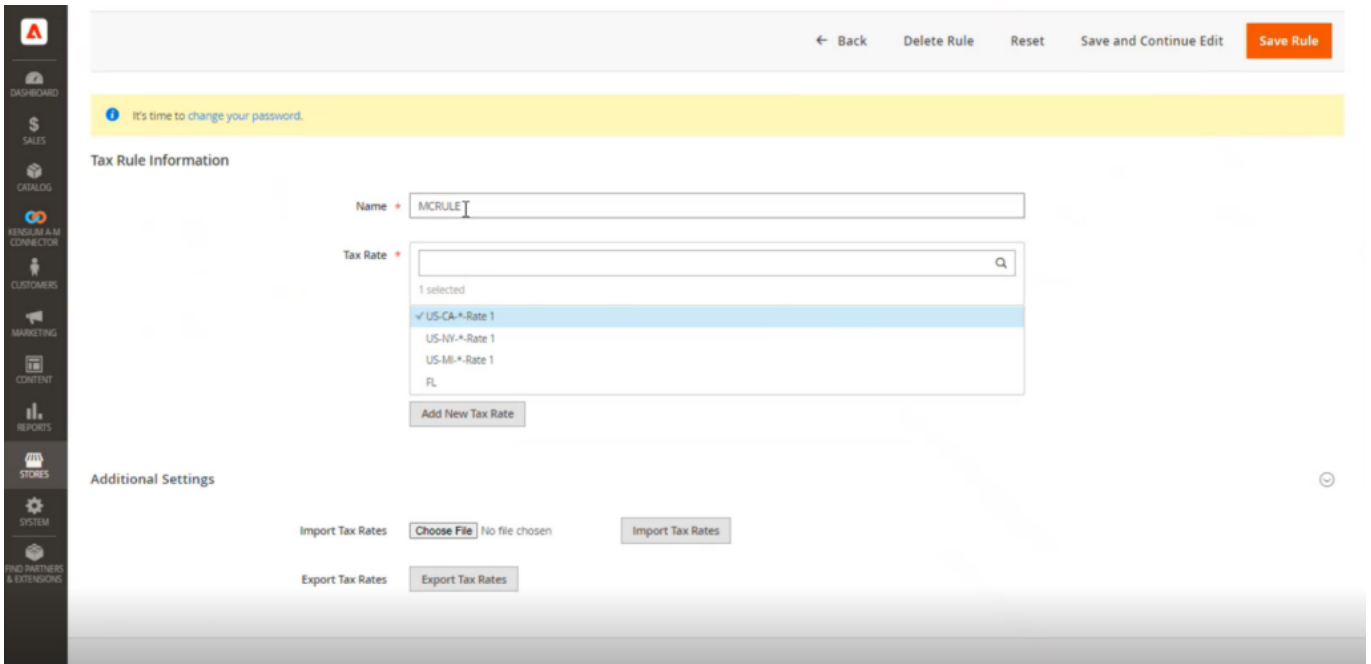
Tax Zones and Rates

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].

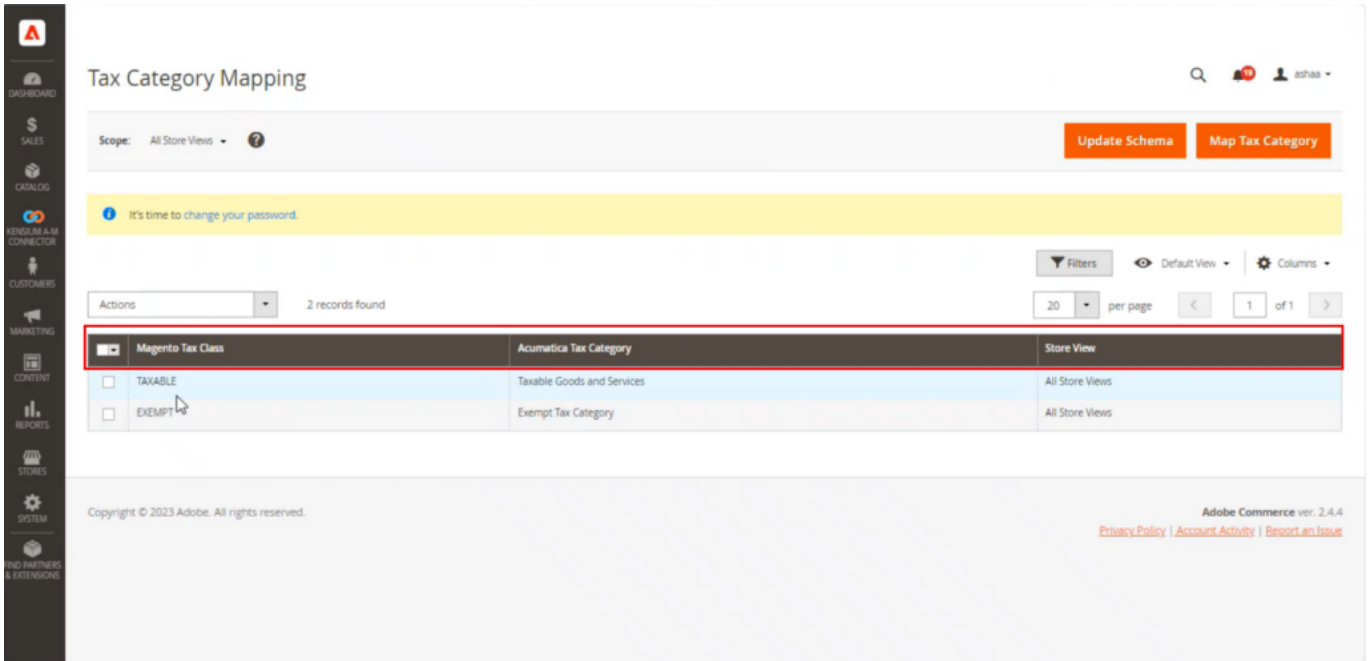


Enter the Tax Rate

### 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

Magento A.M. CONNECTOR

CUSTOMERS

MARKETING

CONTENT

REPORTS

STORES

SYSTEM

AND 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

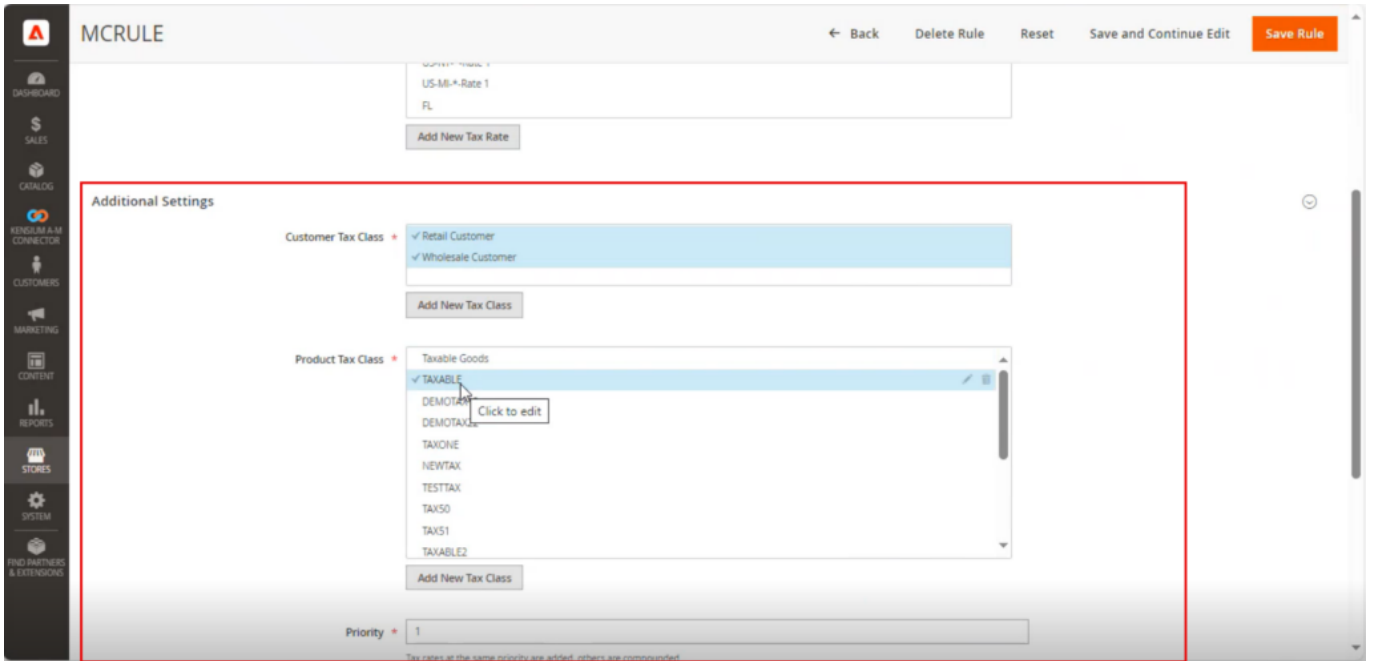
Magento Tax Class	Acumatica Tax Category	Store View
<input type="checkbox"/> TAXABLE	Taxable Goods and Services	All Store Views
<input type="checkbox"/> EXEMPT	Exempt Tax Category	All Store Views

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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.



The screenshot displays the 'MCRULE' configuration page. At the top, there are navigation buttons: 'Back', 'Delete Rule', 'Reset', 'Save and Continue Edit', and a red 'Save Rule' button. Below the navigation, a text field contains 'US-M-A-Rate 1' and 'FL', with an 'Add New Tax Rate' button underneath. The main section is titled 'Additional Settings' and is enclosed in a red border. It contains two sections: 'Customer Tax Class' and 'Product Tax Class'. The 'Customer Tax Class' section has a dropdown menu with 'Retail Customer' and 'Wholesale Customer' selected, and an 'Add New Tax Class' button. The 'Product Tax Class' section has a dropdown menu with 'Taxable Goods' selected, and a list of other options: 'TAXABLE', 'DEMOTAX', 'DEMOTAX2', 'TAXONE', 'NEWTAX', 'TESTTAX', 'TAX50', 'TAX51', and 'TAXABLE2'. The 'TAXABLE' option is highlighted, and a tooltip 'Click to edit' is visible. Below this list is an 'Add New Tax Class' button. At the bottom of the 'Additional Settings' section, there is a 'Priority' field with the value '1' and a small note: 'Tax rates at the same priority are added; others are concatenated'. On the left side of the interface, there is a vertical sidebar with various navigation icons: Dashboard, Sales, Orders, Single A-M Connector, Customers, Marketing, Content, Reports, Stores, System, and Find Partners & Extensions.

Additional Settings Details