



Microsoft Dynamics™ GP
Perceptions

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Introduction

Perceptions allows you to calculate taxes on sales transactions. Taxes are calculated for a specified date range or based on a reduction in the tax percentage. You can also regenerate the taxes for any modifications in the taxable amount and date ranges. You can also generate the files to be sent to the tax authorities.

Perceptions also integrates with Analytical Accounting to provide you with detailed analysis information for taxes that are regenerated for sales transactions.

Check for current instructions

This information was current as of March 2008. The documentation may be updated as new information becomes available. Check the Microsoft Dynamics GP online Web site (<http://go.microsoft.com/fwlink/?LinkID=79222>) for the most current documentation.

The introduction is divided into the following sections:

- [What's in this manual](#)
- [Symbols and conventions](#)
- [Resources available from the Help menu](#)
- [Send us your documentation comments](#)

What's in this manual

This manual is designed to give you an in-depth understanding of how to use the features of Perceptions, and how it integrates with the Microsoft Dynamics™ GP system.

To make best use of Perceptions, you should be familiar with systemwide features described in the System User's Guide, the System Setup Guide, and the System Administrator's Guide.

Some features described in the documentation are optional and can be purchased through your Microsoft Dynamics GP partner.



To view information about the release of Microsoft Dynamics GP that you're using and which modules or features you are registered to use, choose Help >> About Microsoft Dynamics GP.

This manual is divided into the following chapters:

- [Chapter 1, "Setup,"](#) describes how to set up Perceptions so that it meets the needs of your business and integrates with the other modules you use.
- [Chapter 2, "Reports,"](#) describes the process regenerating taxes and printing the reduction reports for customers.

Symbols and conventions

For definitions of unfamiliar terms, see the glossary in the manual or refer to the glossary in Help.

Symbol	Description
	The light bulb symbol indicates helpful tips, shortcuts and suggestions.
	The warning symbol indicates situations you should be especially aware of when completing tasks.

This manual uses the following conventions to refer to sections, navigation and other information.

Convention	Description
<i>Creating a batch</i>	Italicized type indicates the name of a section or procedure.
File >> Print or File > Print	The (>>) or (>) symbol indicates a sequence of actions, such as selecting items from a menu or toolbar, or pressing buttons in a window. This example directs you to go to the File menu and choose Print.
TAB or ENTER	All capital letters indicate a key or a key sequence.

Resources available from the Help menu

The Microsoft Dynamics GP Help menu gives you access to user assistance resources on your computer, as well as on the Web.

Contents

Opens the Help file for the active Microsoft Dynamics GP component, and displays the main “contents” topic. To browse a more detailed table of contents, click the Contents tab above the Help navigation pane. Items in the contents topic and tab are arranged by module. If the contents for the active component includes an “Additional Help files” topic, click the links to view separate Help files that describe additional components.

To find information in Help by using the index or full-text search, click the appropriate tab above the navigation pane, and type the keyword to find.

To save the link to a topic in the Help, select a topic and then select the Favorites tab. Click Add.

Index

Opens the Help file for the active Microsoft Dynamics GP component, with the Index tab active. To find information about a window that’s not currently displayed, type the name of the window, and click Display.

About this window

Displays overview information about the current window. To view related topics and descriptions of the fields, buttons, and menus for the window, choose the appropriate link in the topic. You also can press F1 to display Help about the current window.

Lookup

Opens a lookup window, if a window that you are viewing has a lookup window. For example, if the Checkbook Maintenance window is open, you can choose this item to open the Checkbooks lookup window.

Show Required Fields

Highlights fields that are required to have entries. Required fields must contain information before you can save the record and close the window. You can change the font color and style used to highlight required fields. On the Microsoft Dynamics GP menu, choose User Preferences, and then choose Display.

Printable Manuals

Displays a list of manuals in Adobe Acrobat .pdf format, which you can print or view.

Orientation Training

Accesses online tutorials that show you how to complete basic procedures within Microsoft Dynamics GP. Additional tutorials are available through the CustomerSource Web site.

What's New

Provides information about enhancements that were added to Microsoft Dynamics GP since the last major release.

Microsoft Dynamics GP Online

Opens a Web page that provides links to a variety of Web-based user assistance resources. Access to some items requires registration for a paid support plan.

Current implementation and upgrade information The most recent revisions of upgrade and implementation documentation, plus documentation for service packs and payroll tax updates.

User documentation and resources The most recent user guides, how-to articles, and white papers for users.

Developer documentation and resources The most recent documentation and updated information for developers.

Product support information Information about the Microsoft Dynamics GP product support plans and options that are available, along with information about peer support and self-support resources.

Services information Information about Microsoft Dynamics GP support, training, and consulting services.

Microsoft Dynamics GP Community Access to newsgroups, where you can ask questions or share your expertise with other Microsoft Dynamics GP users.

CustomerSource home page A wide range of resources available to customers who are registered for a paid support plan. Includes access to Knowledge Base articles, software downloads, self-support, and much more.

U.S. Payroll Updates

Provides access to tax updates for state and federal tax withholding. When you select an option, the process to install the updates will begin immediately.



Check with your system administrator before installing tax updates. To be sure that tax updates are installed correctly, refer to documentation for specific tax updates on the CustomerSource Web site.

Customer Feedback Options

Provides information about how you can join the Customer Experience Improvement Program to improve the quality, reliability, and performance of Microsoft® software and services.

Send us your documentation comments

We welcome comments regarding the usefulness of the Microsoft Dynamics GP documentation. If you have specific suggestions or find any errors in this manual, send your comments by e-mail to the following address: bizdoc@microsoft.com.

To send comments about specific topics from within Help, click the Documentation Feedback link, which is located at the bottom of each Help topic.

Note: By offering any suggestions to Microsoft, you give Microsoft full permission to use them freely.

4. Enter a date range to calculate reductions for the selected tax detail ID in the Date From and Due Date fields.
5. Enter the reduction percentage in the % field.



This reduction percentage is valid for transactions for the selected tax detail ID only during the specified date range. The tax percentage set up in the Tax Detail Maintenance window will be considered for transactions beyond the specified date range.

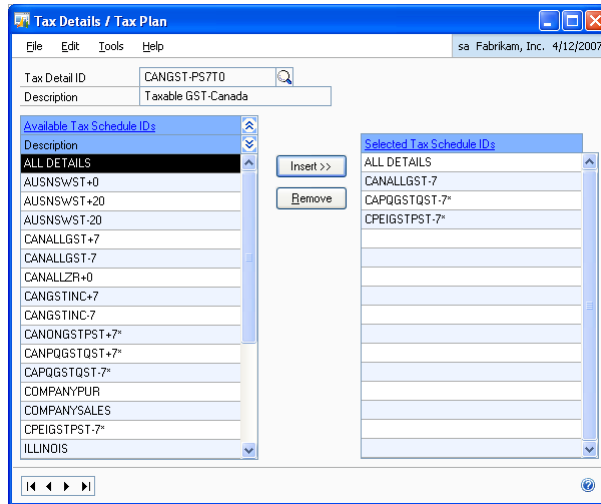
6. Enter the name of the Agency that collects the taxes.
7. Mark the C.E checkbox to print a certificate for the selected tax detail ID.
8. Choose Save to save the reduction percentage you've set up.
9. Choose Item Options and Choose View All to display the reduction/change details for the selected customer in the scrolling window.
10. Choose Clear to clear the values displayed in the window.
11. Choose a line in the scrolling window and choose Select to make the line available.
12. Choose Delete to delete the reduction/change percentage you've set up for the selected tax detail ID.
13. Choose Close to close the window without saving the changes you've made.

Adding a tax detail to a tax schedule

Use the Tax Details / Tax Plans window to add a tax detail to all the applicable tax schedules set up in Microsoft Dynamics GP. Before you begin, you must have already set up all the tax detail IDs you'll require in the Microsoft Dynamics GP Tax Detail Maintenance window. Refer to the Microsoft Dynamics GP manual for information on setting up tax detail IDs and tax schedules.

To add a tax detail to a tax schedule:

1. Open the Tax Details / Tax Plan window.
(Microsoft Dynamics GP menu >> Tools >> Setup >> Company >> Tax details >> Select a sales type tax detail ID >> Additional >> Tax Detail Plan)



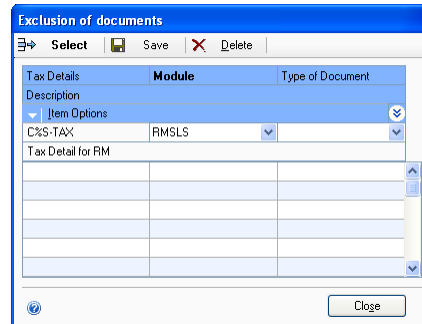
2. The tax detail ID field displays the tax detail ID from the Tax Detail Maintenance window. You can also select a different tax detail ID to assign it to a tax schedule.
3. The description field displays the description for the selected tax detail ID.
4. Select a tax schedule ID from the Available Tax Schedule IDs list and choose Insert to add it into the Selected Tax Schedule IDs list. You can insert multiple tax schedule IDs here.
5. Choose Remove to remove the selected ID from the Selected Tax Schedule IDs list.
6. Choose the Close icon to save your changes and close the window.

Excluding documents from tax calculations

Use the Exclusion of Documents window to exclude document types from tax calculations. The document types having the selected tax detail ID attached will be excluded from tax calculations.

To exclude documents from tax calculations:

1. Open the Exclusion of documents window.
(Microsoft Dynamics GP menu >> Tools >> Setup >> Company >> Tax details >> Select a sales type tax detail ID >> Additional >> Exclusion of documents)



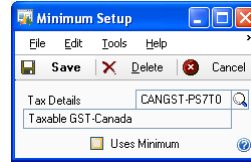
2. The Tax Details column displays the tax detail ID from the Tax Detail Maintenance window.
3. Select a module type whether Receivables Management or Sales Order Processing to exclude a document type.
4. Select the document type you want to exclude from tax calculations. All the documents of the selected document type, and having the selected tax detail ID attached, will be excluded from tax calculations.
5. Choose Save to display the document to be excluded in the scrolling window.
6. Select a line in the scrolling window and choose Select to make the line available for modification.
7. Choose Delete to delete the selected line from the scrolling window.
8. Choose Close to close the window without saving your changes.

Activating the minimum set up amount for tax calculations

Use the Minimum Setup window to consider the minimum taxable amount specified in the Tax Detail Maintenance window for the selected tax detail ID while calculating taxes. Taxes will be calculated only if the cumulative invoice total for the selected tax detail ID is more than the minimum amount specified.

To activate the minimum set up amount for tax calculations:

1. Open the Minimum Setup window.
(Microsoft Dynamics GP menu >> Tools >> Setup >> Company >> Tax details >> Select a sales type tax detail ID >> Additional >> Minimum Setup)



2. The Tax Details field displays the tax detail ID you've selected in the Tax Detail Maintenance window.
3. Mark the Uses Minimum checkbox to consider the minimum taxable amount in the Tax Detail Maintenance window for tax calculations.
4. Choose Save to save the Setup.
5. Choose Delete to unmark the Uses Minimum checkbox. The cumulative taxable amount for the selected tax detail ID will not be considered for tax calculations.
6. Choose Cancel to close the window.

Chapter 2: Reports

You can calculate and regenerate the taxes before posting the transactions. You can also generate the files to be sent to the tax authorities.

This information is divided into the following sections:

- [Regenerating taxes](#)
- [Printing the reduction report for customers](#)

Regenerating taxes

Use this information to calculate and regenerate the taxes during transaction entry or before posting the transactions. Taxes are regenerated for any modifications in the taxable amount and the date ranges.

To regenerate taxes:

1. Open the Sales Batch Entry window.
(Transactions >> Sales >> Sales Batches) OR

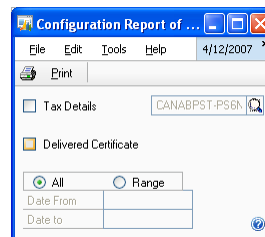
Open the Sales Transaction Entry window
(Transactions >> Sales >> Sales Transaction Entry)
2. Select the batch for which you want to regenerate the taxes.
3. Choose Additional >> Tax Regeneration. A message appears indicating that the taxes were regenerated successfully.
4. Click OK on the message to return to the Sales Batch Entry window and post the transaction.

Printing the reduction report for customers

Use this information to print the tax reduction report for customers.

To print the reduction report for customers:

1. Open the Configuration Report of Aliquot Subject window.
(Cards >> Sales >> Customer >> Select a customer ID >> Address >> Additional >> Subject Reduction Setup >> Click the printer icon)



2. Mark the Tax Details checkbox. You can select a tax detail ID for which to print the tax reduction report for the selected customer.
3. Mark the Delivered Certificate checkbox to print reports.

All Select this option to print all the reduction reports for the selected tax detail ID.

Range Select this option to print reduction reports for the selected tax detail ID for a specified date range.

4. Enter the date range for which to print the report in the Date From and Date To fields. These fields are available only if you have selected the Range option.
5. Choose Print to print the reduction report.
6. Choose the Close button to close the window.

Glossary

Reduction percentage

Reduction in the tax percentage.

Reduction report

Displays the details of reduction in the tax percentage for a customer.

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