Microsoft Dynamics™ AX

Feature for India (Structures)

White Paper

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Introduction

This information provides setup instructions and an overview of the Structure feature for Microsoft Dynamics™ AX that is specific to users in India. It includes a description of the feature, a list of forms and fields used and added for this feature, and procedural information to use the feature. The feature is available only if the configuration key for India is selected.

Structures

You can define a standard template to use to handle various combinations of taxes and charges to associate with business transactions in India.

You can use the formula builder to deal with the complex and hierarchical computation of taxes and charges. You can determine the sequence to apply the taxes and charges and their impact on inventory. You can define the posting accounts for the taxes and charges and also specify if the charges are payable to a third-party vendor, that is, to a vendor who is not linked to the purchase order.

The structures can be attached to a purchase order, sales order, or stock transfer orders and Business relations (CRM). You also can define the default structures for a vendor and a customer.

You also can set up default purchase order header and row structures in the **Accounts payable parameters** form, sales order row structures in the **Accounts receivable parameters** form and purchase order and sales order structures in the **Customer relationship management (CRM) parameters** form.

The taxes and charges that apply for the company are defined at the company-level. This information will flow into each warehouse or a combination of warehouses (for stock transfers). You can select the taxes and charges that apply for a warehouse from the taxes and charges set up at the company-level.

The functionality of structures also forms the basis to address the requirements of excise tax, tax on sales, and service tax.

Refer to the following topics for more information:

- Basic setup for this feature
- Attach the default structures to the customers and vendors
- Structures in transactions
- Forms for this feature
- Forms that are modified for this feature

Basic setup for this feature

Define taxes and charges at the company-level and warehouse-level

1. Click **General ledger** > **Setup** > **Structures** > **Setup** > **Initialize company level taxes/charges**.

   Note:

   The setup of taxes and charges at the company-level is organized in a three-level hierarchy as charge group-charge type-charge detail.

2. Click the **Charge groups** tab to view the two charge groups that are predefined in the system: **Taxes** and **Charges**.

3. Click the **Charge types** tab to view the charge types that are predefined for each charge group.

   - The predefined charge types for the **Taxes** charge group are **Excise**, **Sales tax**, and **Service tax**.

   - The predefined charge types for the **Charges** charge group are **Packing**, **Handling**, **Freight**, **Insurance**, **Loading**, **Unloading**, **Octroi** (type of entry charge), **C&F** (clearing and forwarding charges), and **Misc** (miscellaneous charges).

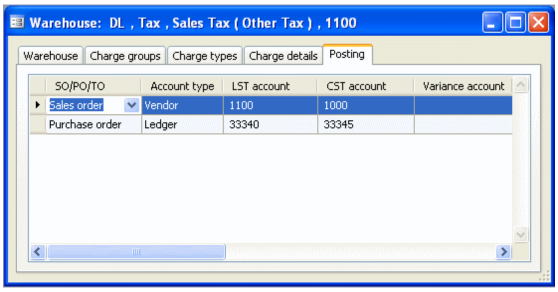
4. Click the **Charge details** tab. Enter the charge details for the **Charges** charge group in the **Charge name** field and the **Description** field. The charge details for **Taxes** charge group are predefined in the system.
5. Press **CTRL+S** or close the form to save the settings.
6. Click **General ledger** > **Setup** > **Structures** > **Setup** > **Setup warehouse charges** > **Warehouse** tab to define taxes and charges at the warehouse-level.
7. Press **CTRL+N** and select the warehouse to define the taxes and charges for.
8. Click **Copy from company** to copy the entire set of taxes and charges from the company-level setup to the warehouse.

   – OR –

   Click the **Copy from warehouse** button to copy the taxes and charges from the existing warehouse-level setup. Select the **Source warehouse** and the **Destination warehouse** and click **Copy** to copy the taxes and charges setup from source warehouse to destination warehouse. Click **Refresh** to view the copied warehouse with the existing warehouse-level setup.
9. Click the **Posting** tab, press **CTRL+N** to define the posting profile for the charge type selected on **Charge types** tab.

   Note:

   For the **Taxes** charge group that has an **Excise** charge type, the default posting profile is created on the **Excise registration number** form (**General ledger** > **Setup** > **Excise**) and cannot be modified.
10. In the **SO/PO/TO** field, select if the charge type applies to sales orders, purchase orders, stock transfers or a journal. Select the account type and the posting account, account number, and variance account.



Note:

- On the **Charge details** tab, you can remove only a charge detail defined for the **Charges** charge group.
- You cannot select the **Stock transfer** option for sales tax and the service tax charge types.
- The account type must be set to **Ledger** for the **Charges** charge group.
- Only service tax on transactions with a GTA commercial vendor can be applied on a journal. The account type can be set to either **Ledger** or **Vendor** for the **Taxes** charge group with **Sales tax** and **Service tax** charge types.
- Select the corresponding Local Sales Tax (**LST**) and Central Sales Tax (**CST**) accounts for the **Taxes** charge group with the **Sales tax** charge type.
- The variance account is the account that the difference between the estimated and actual values of the charges are posted to. The **Variance** field will be activated only for the **Charges** charge group.

Set up structures

1. Click **General ledger** > **Set up** > **Structures** > **Structures**.
2. Click the **Structure** tab and select a structure and click **Copy structure** to create a new structure with the charges and taxes copied from the selected source structure.

   – OR –

   Press **CTRL+N** to create a new structure. The structure number is generated automatically in the **Structure number** field.
3. Enter the details in the following fields:
   - **Structure name**: Enter a name for the structure.
   - **Applicable on**: Select if the structure applies to sales orders, purchase orders, stock transfers, or a journal.
   - **Sales type** or **Purchase type** or **Transfer type** or **Journal type**: Select the transaction type that the structure applies to. The options are **Domestic**, **Import** and **Export**.

     Note:

     You cannot use the **Import** and **Export** options in the current release.
   - **Header/Row**: Select if the structure applies to header-level or row-level transactions.

     Note:

     Taxes are not applied to a header-level structure and header structures are not warehouse specific and apply to all the purchase order transactions.
   - **Warehouse**: Select the source (from) warehouse that the structure applies to.
   - **To warehouse**: Select the destination warehouse that the structure applies to. This field is available only for structures that apply on stock transfer.
   - **Intercompany**: Select this check box if the structure applies to intercompany transactions.
   - **Status**: Select the structure status. Only approved structures can be used in a transaction, and after the structure is used in a transaction, the structure status changes to **In use**. You can set the status to **Inactive** to discontinue the use of a particular structure. You cannot modify the structures with an **Approved**, **In use**, or **Inactive** status.
   - **Approved by**: The name of the user who set the structure status to **Approved**.
4. Click the **Copy charges and taxes** button to copy the charges and taxes setup for the selected warehouse to the structure on the **Structure details** tab.

   Note:

   - For header-level structures, charges are copied from the company setup.
   - If the structure is applied on stock transfer, taxes and charges setup is copied from the selected source (from) warehouse. You also can add the charges for the structures on the **Structure detail** tab.
5. Click the **Structure details** tab; click the **Copy taxes** button to copy the tax setup from the selected warehouse.
6. If the structure is applied on purchase order or stock transfer, press **CTRL+N** to add charges for the structure.
7. Select the **Charge group**, **Charge type**, and **Charge name** for the structure from the selected warehouse setup.

8. Select the basis for calculation of taxes and charges in the **Basis** field. The options are:
   - **Fixed per document**: Charges are calculated for each line item of a purchase order. The charge amount specified in the purchase order form is allocated to each line based on its net amount. This option applies only for header-level charges.
   - **Fixed per invoice**: Charge amount specified is applied to every invoice generated.
   - **Fixed per line**: Charge amount specified is applied for each line item.
   - **Percentage**: Charges are calculated, based on the formula defined on the **Formula** tab. Therefore, if a charge or tax is calculated on a percentage basis, you must define the formula for calculating the amount that the percentage is to be applied to on the **Formula** tab.
   - **Unit of measure**: Charges are calculated on the unit of measure of the item.
9. Select the **Payable to third party** check box if the charge is payable to a third-party vendor.
10. Select the **GTA – Commercial vendor** check box if the freight charge is payable to a Goods Transport Agency (GTA) vendor.
11. Click the **Up** or **Down** button to change the sequence of applying and calculating taxes and charges.

    Note:

    - The serial numbers generated by the system determine the sequence that the taxes and charges are applied in the structure.
    - The manual selection of charges is allowed only for structures that apply to purchase orders and stock transfers.
    - If the charge is payable to a third party, the status of the **S/M** field changes to **Multiple**. The **S/M** field also can be set to **Single** for a charge payable to a third party.
    - The **GTA–Commercial vendor** check box will be activated only if the charge type is **Freight**, and if you select this check box then the **Payable to third party** check box is inactivated.
12. Click the **Setup** tab, and select the currency code for the structure in the **Currency** field.

    Note:

    If the transaction type is **Domestic**, the company currency code is selected automatically for the structure.
13. Select the **Load on inventory** check box to apply the charges on the inventory and enter the percentage amount of charges in the **Loading percentage** field.

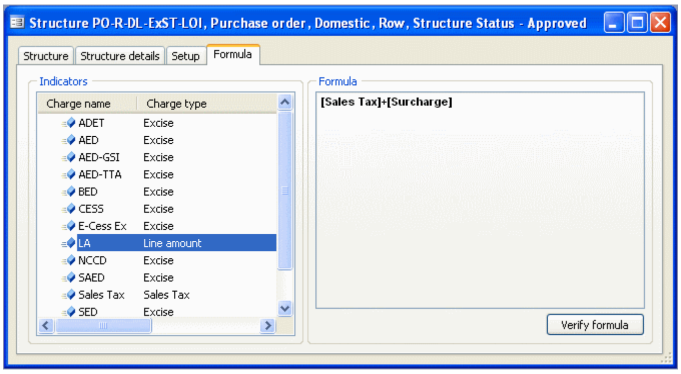
    Note:

    If the charges are payable to a third party, the **Load on inventory** check box is selected automatically and the percentage amount is set to 100%.
14. Select the **Print** check box and enter the printable text in the **Printable text** field to print the structure transaction report with the printable text.
15. In the **Calculate upon** field, select the value that the tax or charge is to be calculated on. The options are **Transaction value** and **Assessable value**.

    Note:

    By default, the charges are calculated on the transaction value of the item.

16. Click the **Formula** tab, and define the formula for the charge group record selected on the **Structure details** tab. You can view the selected charge name with a list of other charge names that are in sequence prior to the charge that you select on the **Structure details** tab.



17. In the **Indicators** pane, double-click a charge name to include the charge in the **Formula** pane to define the formula.

    Note:

    The **Line amount** is the transaction amount of the sales order transaction line or purchase order transaction line.

18. In the **Formula** pane, enter the operator and repeat the previous step to add the operand.
19. Repeat steps 17 and 18 to get the desired formula.
20. Click **Verify formula** to verify the formula and press **CTRL+S** to save the settings.

Attach the default structures to the customers and vendors

Attach a default structure to customer

1. Click **Accounts receivable** > **Customers** > **Overview** tab.
2. Select the **Customer account**. Click the **Sales order** tab and select the default warehouse. Select the default row structure for the customer in the **Structure name** field. Only row structures that apply to sales orders set for the selected warehouse are available in this field.

   Note:

   - The default structure is displayed on the sales order line when a sales order is created for the customer. However, you can change the default structure on the sales order line.
   - You also can attach a default structure to all the sales order transaction for every customer in the **Accounts receivable parameter** form (**Accounts receivable** > **Setup** > **Parameters** > **General tab** > **Row structure** field).

3. Press **CTRL+S** or close the form to save the settings.

Attach the default structures to a vendor

1. Click **Accounts payable** > **Vendors** > **Overview** tab.
2. Select the **Vendor account**. Click the **Purchase order** tab and select the default warehouse. Select the default structure for the vendor in the **Header structure** and **Row structure** fields**.** All row structures and header structures that apply to purchase orders set for the selected warehouse are available in these fields.

   Note:

   - The default structure is displayed on the purchase order header and line when a purchase order is created for the vendor. However, you can change the default structure on the purchase order header and line.
   - You also can attach the default structures to all the purchase order transaction for every vendor in the **Accounts payable parameter** form (**Accounts payable** > **Setup** > **Parameters** > **General tab** > **Row structure** field).
3. Press **CTRL+S** or close the form to save the settings.

Attach the default structures for the business relation transactions

1. Click **CRM** > **Setup** > **Parameters** > **General** tab.
2. In the **Customer warehouse** field, select the default customer warehouse for the business relation transactions and select the default structure for the selected default customer warehouse in the **Customer structure** field.
3. In the **Vendor warehouse** field, select the default vendor warehouse for the business relation transactions. Select the default header structure in the **Vendor header structure** field and row structures in the **Vendor row structure** field for the selected default vendor warehouse.

   Note:

   The default warehouse and structure selected in this form appears for every business relation transaction in the **Business relations** form. You can change the default warehouse and structure for a transaction on the **IND Localization** tab on the **Business relations** form.

Structures in transactions

Structures in sales order transactions

1. Click **Accounts receivable** > **Sales order** > **Overview** tab.
2. Create a sales order and enter the required details.
3. Click the **IND Localization** tab. The default row structure defined for the customer is displayed in the **Row structure** field. You can change this value.
4. Click the **Lines** tab on the order line-level of the sales order and create a new line for an item.

   Note:

   For each item line, you can modify the default row structure that is defined on the header-level.
5. Click the **Address** tab and select the delivery address for the item.
6. Click the **Dimension** tab and select the warehouse for the item in the **Warehouse** field.

   Note:

   You can define multiple delivery addresses and multiple warehouses for a sales order with multiple item lines. Row structures are available based on the warehouse selected for a line.

7. Click **Setup** > **Tax** to open the **Sales line charges** form and view the calculated values of taxes for the selected item.

   Note:

   If multiple warehouses and multiple delivery addresses are defined for a sales order transaction with multiple item lines then you can split the sales quotation, sales order confirmation, picking slip, and the invoice for each item line transaction. Based on the customer warehouse and delivery address the sales quotation, sales order confirmation, picking list, packing slip and invoice are split.

Structures in purchase order transactions

1. Click **Accounts payable** > **Purchase order** > **Overview** tab.
2. Create a purchase order and enter the required details.
3. Click the **IND Localization** tab. The default structures defined for the vendor are displayed in the **Header structure** and **Row structure** fields. You can change the default values.

   Note:

   The header-level structures will have only charges defined in them.
4. Click **Setup** > **Charges** to open the **Header level charges** form and select the basis for calculation of charges in the **Basis** field.
5. Enter the amount or percentage value for the charges that applies for the purchase order.
6. Click the **Lines** tab on the order line-level of the purchase order and create a new line for an item.

   Note:

   For each item line, you can modify the default row structure that is defined on the header-level.
7. Click the **Address** tab and select the delivery address for the item.
8. Click the **Dimension** tab and select the warehouse for the item in the **Warehouse** field.

   Note:

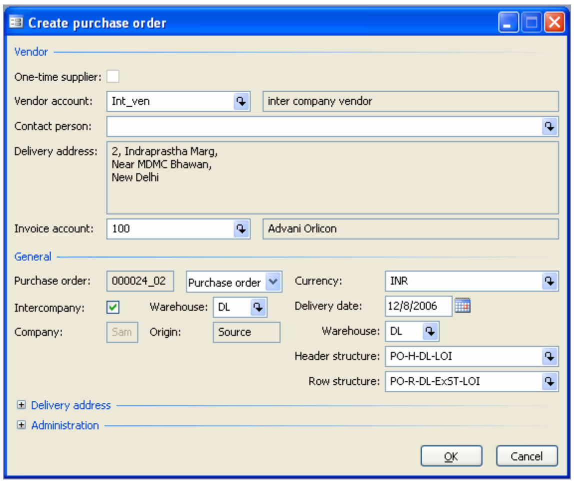
   You can define multiple delivery addresses and multiple warehouses for a purchase order with multiple item lines. Row structures are available based on the warehouse selected for a line.
9. Click **Setup** > **Charges** to open the row-level **Purchase line charges** form and select the basis for calculation of charges in the **Basis** field.
10. Enter the amount or percentage value for the charges that apply for the item.
11. Click **Setup** > **Tax** to open the **Purchase line charges** form and view the computed values of taxes for the item.

    Note:

    If the multiple warehouses and multiple delivery addresses are defined for a purchase order transaction with multiple item lines, you can split the purchase order, packing slip, and invoice for each item line transaction. Based on the vendor warehouse and delivery address, the purchase order, packing slip, and the invoice are split.

Structures in intercompany transactions

1. Click **Accounts payable** > **Purchase order** > **Overview** tab.
2. Press **CTRL+N** to open the **Create purchase order** form and select the vendor that the intercompany transaction is set up for.



Note:

- You can perform intercompany transactions only through purchase order transactions.
- You can set up the intercompany transactions in the **Endpoints** form (**Basic** > **Setup** > **Application Integration framework** > **Endpoints**).
- For an intercompany vendor, the **Intercompany** check box is selected automatically. The **Company** field displays the intercompany that is set up for the selected vendor for intercompany transaction in the **Endpoints** form.

3. Select the warehouse for the originating company in the **Warehouse** field.
4. Select the header structure and row structure for the originating company.
5. Select the warehouse for the intercompany in the **Warehouse** field and click **OK** to create a purchase order for the selected vendor for the intercompany transaction. At the same time, a corresponding sales order is created automatically in the intercompany with respect to the intercompany warehouse and the structure in the originating company.

   Note:

   - For the intercompany transactions, you cannot modify the warehouse and structures in the **Purchase order** form and **Sales order** form.
   - You can post the purchase order invoice in the originating company only when the sale order invoice is posted in the intercompany.

Structures in stock transfer transactions

1. Click **Inventory management** > **Journals** > **Item transaction** > **Movement** > **Indian localization** tab.
2. In the **Row structure** field, select the row-level structure for the selected warehouse combination.
3. Click **Lines** and enter the item details, and click **Setup** > **Charges** to select the basis for calculation of charges in the **Basis** field.
4. Enter the amount or percentage value for the charges that apply for selected item.
5. Click **Setup** > **Tax** to view the calculated value of taxes for the selected item.

Forms for this feature

Refer to the following information about forms that you will use with this feature.

Form name and locator	Description
Initialize company level taxes / charges (form) General ledger > Setup > Structures > Setup >Initialize company level taxes / charges	Use this form to define the taxes and charges that apply to the company. The setup of taxes and charges at the company-level is organized in a three-level hierarchy as charge group-charge type-charge detail.
Initialize company level taxes / Charges (form) General ledger > Setup > Structures > Setup > Initialize company level taxes / charges > Charge groups tab	**Charge group** field The charge group. **Group description** field A short description of the selected charge group.
Initialize company level taxes / charges (form) General ledger > Setup > Structures > Setup > Initialize company level taxes / charges > Charge types tab	**Charge type** field The charge type for the charge group selected on the **Charge groups** tab. **Type description** field A short description for the selected charge type.
Initialize company level taxes / charges (form) General ledger > Setup > Structures > Setup > Initialize company level taxes / charges > Charge details tab	**Charge name** field Enter or view the charge name for the selected charge group and charge type. **Description** field Enter or view the description for the selected charge name.
Initialize company level taxes / charges (form) General ledger > Setup > Structures > Setup > Initialize company level taxes / charges	**Charge groups** tab View the charge groups set up at the company-level. The charge groups predefined in the system are **Taxes** and **Charges**. **Charge types** tab View the charge types defined for the charge group selected on the **Charge groups** tab. **Charge details** tab Define the charge details for the selected charge group and charge type. The charge details for **Taxes** charge group are predefined in the system.
Setup warehouse charges (form) General Ledger > Set up > Structures > Setup > Setup warehouse charges	Use this form to define the taxes and charges to different warehouses. You must select the taxes and charges that apply to a warehouse from the taxes and charges that are defined at the company-level.
Setup warehouse charges (form) General Ledger > Set up > Structures > Setup > Setup warehouse charges > Warehouse tab	**Warehouse** field Select or view the warehouse to define the taxes and charges for. **Name** field The name of the warehouse.
Setup warehouse charges (form) General Ledger > Set up > Structure >	**Charge group** field The charge groups that are predefined in the system.

Form name and locator	Description
Setup > Setup Warehouse charges > Charge groups tab	**Group description** field A short description for the selected charge group.
Setup Warehouse charges (form) General Ledger > Set up > Structures > Setup > Setup warehouse charges > Charge types tab	**Charge type** field The charge type for the charge group that is selected on the **Charge groups** tab. **Type description** field A short description for the charge type.
Setup warehouse charges (form) General Ledger > Set up > Structures > Setup > Setup warehouse charges > Charge details tab	**Charge name** field Select or view the charge name for the selected charge group and charge type. **Description** field Enter or view the description for the charge name.
Setup warehouse charges (form) General Ledger > Set up > Structures > Setup > Setup warehouse charges > Posting tab	**SO/PO/TO** field Select if the selected tax or charge applies to sales orders, purchase orders, stock transfers, or journals. **Account type** field Select the account type for posting and variance accounts. The options are **Ledger, Customer,** and **Vendor**. **Posting account** field Select or view the **Posting account** for the charge type. **Account number** field The posting account number. **Variance account** field Select or view the **Variance account** that the differences between the estimated and actual values of the current charges or taxes are posted to. The **Variance** field is active only for the **Charges** charge group.
Setup warehouse charges (form) General Ledger > Set up > Structures > Setup > Setup warehouse charges > Warehouse tab	**Copy from company** button Copy the taxes and charges from the company-level setup to the selected warehouse. **Copy from warehouse** button Copy the taxes and charges from an existing warehouse setup to the selected warehouse.
Setup warehouse charges (form) General Ledger > Set up > Structures > Setup > Setup warehouse charges	**Warehouse** tab Define taxes and charges for different warehouses, either by copying from the company-level setup or existing warehouse-level setup. **Charge groups** tab Select or view the charge groups set up for the warehouse. **Charge types** tab Select or view the charge types for the warehouse. **Charge details** tab Define the charge details for the selected charge group and charge type. The charge details for the **Taxes** charge group are predefined in the system.

Form name and locator	Description
	Posting tab Set up the posting profile for the charges and taxes defined for the warehouse.
Copy – From warehouse (form) General Ledger > Set up > Structures > Setup > Setup warehouse charges > Copy from warehouse button	Use this form to copy taxes and charges from a source warehouse setup to a destination warehouse.
Copy – From warehouse (form) General Ledger > Set up > Structures > Setup > Setup warehouse charges > Copy from warehouse button	**From warehouse** field Select the source warehouse that the taxes and charges setup must be copied from. **To warehouse** field Select the destination warehouse that the taxes and charges setup must be copied to.
Copy – From warehouse (form) General Ledger > Set up > Structures > Setup > Setup warehouse charges > Copy from warehouse button	**Copy** button Copy the taxes and charges from the source warehouse to the destination warehouse.
Structures (form) General Ledger > Set up > Structures > Structures	Use this form to create structures and define the formula and basis of calculation that applies to different transaction types and warehouses.
Structures (form) General Ledger > Set up > Structures > Structures > Structure tab	**Structure number** field The unique identification number for the structure. **Structure name** field Enter a name for the structure. **Applicable on** field Select if the structure is to be applied to sales orders, purchase orders, stock transfers, or journals. **Note**: Structure that applies on journals can be applied only for service tax on the transactions with a GTA vendor. **Purchase type** field Select the transaction type that the structure applies to. The options are **Domestic**, **Import**, and **Export**. **Note**: you can apply the **Import** and **Export** options only for EXIM (export and import) transactions, which is currently not possible in Microsoft Dynamics AX. **Header/Row** field Select if the structure applies to the header-level (document-level) or row-level (item-level). **Note**: For **Sales order**, the structures apply to only row-level. **Warehouse** field Select the warehouse that the structure is to be applied form. **Note**: Warehouse cannot be selected for purchase order header structures. **To warehouse** field If the structure is applied to stock transfers, select the

Form name and locator	Description
	warehouse that the structure must be applied to. **Intercompany** check box Select this check box if the structure applies to intercompany transactions. **Status** field Select the **Structure status**. Only approved structures can be used in the transaction. **Note**: You cannot set the structure status to **In use** manually. **Approved by** field The name of the person who has approved the structure.
Structures (form) General Ledger > Set up > Structures > Structures > Structure details tab	**Serial number** field The serial number of the charge. **Note**: The serial number determines the sequence that the taxes and charges are applied in the structure. **Charge group** field Select or view the charge group for the structure that is selected on the **Structure** tab. **Charge types** field Select or view the charge type for the selected charge group. **Charge name** field Select or view the charge name for the selected charge group and charge type. **Basis** field Select the basis of the calculation taxes and charges from the following options: • **Fixed per document** • **Fixed per invoice** • **Fixed per line** • **Percentage** • **Unit of measure** **Payable to third party** check box Select this check box if the charges are payable to a third-party vendor. **S/M** field Select if the charges are payable to single or multiple parties. **GTA-Commercial vendor** check box Select this check box if the charges are payable to a GTA vendor.
Structures (form) General Ledger > Set up > Structures > Structures > Setup tab	**Currency** field Select the currency code to use with the current structure. **Load on inventory** check box Select this check box to apply the charges on the inventory **Loading percentage** field

Form name and locator	Description
	Enter the percentage amount of charges that apply on the inventory. **Print** check box Select this check box to print the structure transaction report. **Printable text** field Enter the text that must be printed on the transaction report. **Calculate upon** field The basis for the calculation of charges.
Structures (form) General Ledger > Set up > Structures > Structures > Formula	**Formula** field Define the formula if the calculation basis type is **Percentage**. The value of the charge is calculated based on the formula.
Structures (form) General Ledger > Set up > Structures > Structures > Structure tab	**Copy charges and taxes** button Copy the charges and taxes from the selected warehouse setup. **Copy structure** button Create a copy of the existing structure.
Structures (form) General Ledger > Set up > Structures > Structures > Structure details tab	**Copy taxes** button Copy taxes to the structure. **UP** button Move the selected charge or tax up one row. **Down** button Move the selected charge or tax down one row.
Structures (form) General Ledger > Set up > Structures > Structures > Formula tab	**Verify formula** button Verify whether the formula for a charge or tax is free of errors or not.
Structures (form) General Ledger > Set up > Structures > Structures	**Structure** tab Create structures, select the business transaction type that the structure must be applied to and define the warehouse for the structure. **Structure details** tab Create new lines for charges and copy taxes to the structure from the selected warehouse. Click the **UP** or **Down** button to change the sequence of how taxes and charges are applied and calculated. **Setup** tab Select a currency and a print option and apply charges on the inventory. **Formula** tab Define the formula for the charges and taxes.
Header level charges (form) Accounts payable > Purchase order > click header level Setup > Charges button	Use this form to select the calculation basis and enter the actual amount or percentage value for the charges that applies for the transaction

Form name and locator	Description
Purchase line charges (form) Accounts payable > Purchase order > click row level Setup > Charges button **Transfer line charges** (form) Inventory management > Journals > Item transaction > Movement > Journal line > click Setup > Charges button	
Header level charges (form) Accounts payable > Purchase order > click header level Setup > Charges button **Purchase line charges** (form) Accounts payable > Purchase order > Click row level Setup > Charges button **Transfer line charges** (form) Inventory management > Journals > Item transaction > Movement > Journal line > Click Setup > Charges button	**Charge name** field The charge name defined for the structure that is attached to the selected transaction. **Basis** field Select the basis of calculation to use for the charge. **Value** field Enter the actual amount or percentage value for the charge. **Charge value** field The actual charge amount or calculated charge amount for the transaction.
Purchase line charges (form) Accounts payable > Purchase order > Click row level Setup > Tax button **Sales line charges** (form) Accounts receivable > Sales order > Click row level Setup > Tax button **Transfer line charges** (form) Inventory management > Journals > Item transaction > Movement > Journal line > Click Setup > Tax button	Use this form to view the calculated tax amounts for the transaction.
Purchase line charges (form) Accounts payable > Purchase order > Click row level Setup > Tax button **Sales line charges** (form) Accounts receivable > Sales order > Click row level Setup > Tax button **Transfer line charges** (form) Inventory management > Journals > Item transaction > Movement > Journal line > Click Setup > Tax button	**Charge name** field The tax name defined for the structure attached to the selected transaction. **Basis** field The basis that the tax is calculated on for the transaction. **Note:** For any transaction, tax is calculated based on the percentage value. **Value** field The percentage value of the tax. **Charge value** field The calculated tax amount for the transaction.

Forms that are modified for this feature

Refer to the following information about additional forms that you will use with this feature.

Form name and locator	Description
Customers (form) Accounts receivable > Customers > Sales order tab	**Structure name** field Select the default row structure for the customer for sales order transactions.
Vendors (form) Accounts payable > vendors > Purchase order tab	**Header structure** field Select the default header (document-level) structure for the vendor for purchase order transactions. **Row Structure** field Select the default row (item-level) structure for the vendor for purchase order transactions.
Purchase order (form) Accounts payable > Purchase order > IND Localization tab	**Header structure** field Select the header structure for the purchase order transaction. **Row Structure** field Select the row structure for the purchase order transaction.
Purchase order (form) Accounts payable > Purchase order	**Setup** > **Charges** header-level button Set up the header-level charges for the purchase order. **Setup** > **Charges** line-level button Set up the charges for the item. **Setup** > **Tax** line-level button View the tax amounts for the item.
Sales order (form) Accounts payable > Sales order > IND Localization tab	**Row structure** field Select the row structure for the sales order transaction.
Sales order (form) Accounts payable > Sales order	**Setup** > **Tax** line-level button View the tax amounts for the item.
Movement (form) Inventory management > Journals > Item transaction > Movement > Indian localization tab	**Row structure** field Select the row-level structure for the warehouse combination.
Movement (form) Inventory management > Journals > Item transaction > Movement	**Setup** > **Charges** line-level button Set up the charges for the item. **Setup** > **Tax** line-level button View the tax amounts for the item.

Microsoft Dynamics is a line of integrated, adaptable business management solutions that enables you and your people to make business decisions with greater confidence. Microsoft Dynamics works like and with familiar Microsoft software, automating and streamlining financial, customer relationship and supply chain processes in a way that helps you drive business success.

U.S. and Canada Toll Free 1-888-477-7989
Worldwide +1-701-281-6500
www.microsoft.com/dynamics

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