

Click to begin



Maitre'D®

2005 Setup Guidelines

Taxes



This document will guide you through setting up a Tax Category and a percentage rate Tax in Maitre'D.

Tax Categories control the grouping of taxes in reports.

Taxes can be Fixed amounts, Rate based, or Table based.

They apply to Divisions as well as other fees on the check such as a Gratuity or Service charge.



Taxes

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Setup Taxes:

- 1) Tax Category
- 2) Tax

This document will walk you through these setups step by step.



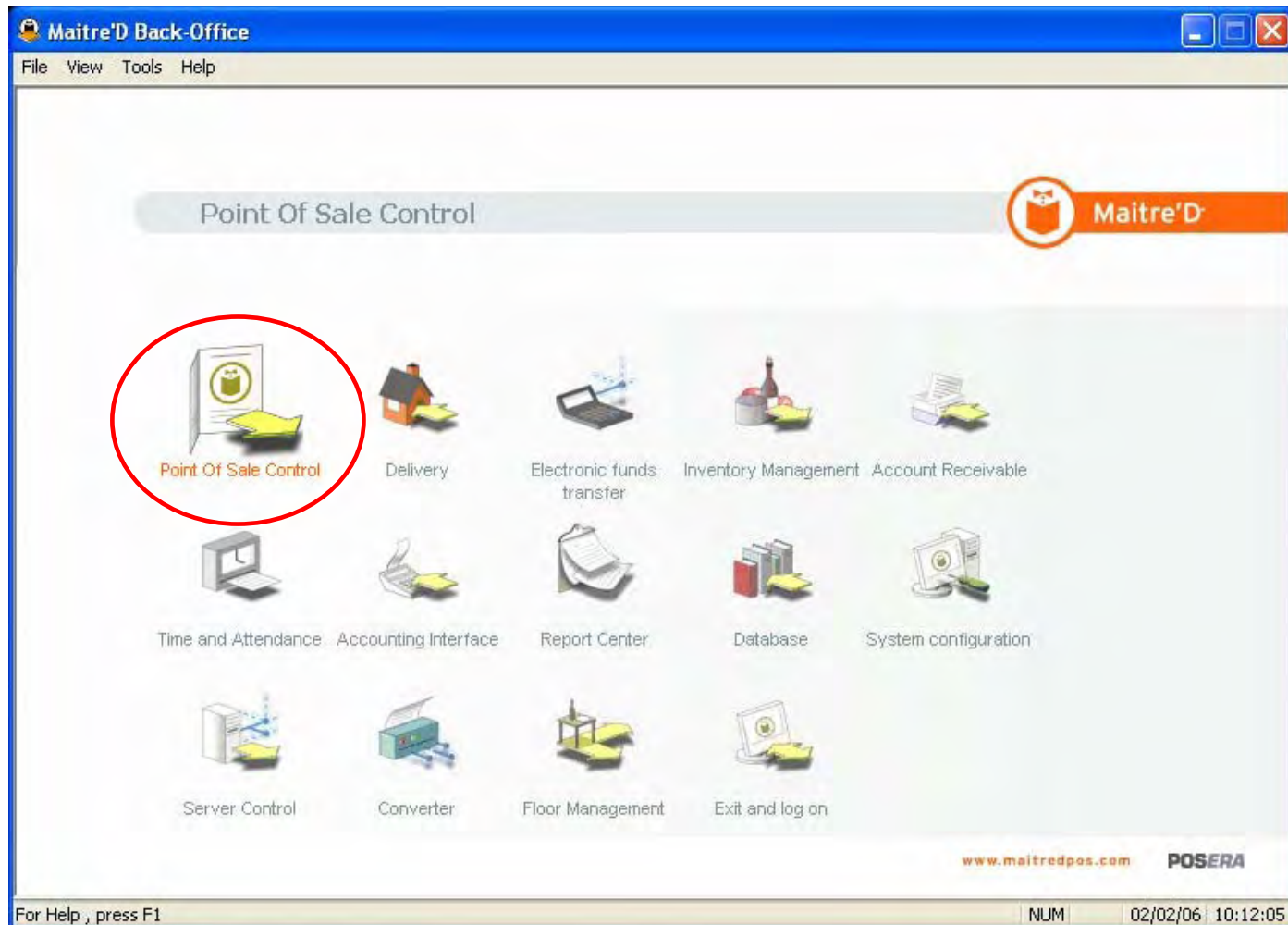
Step 1: Tax Category



Step 1: Tax Category

Click to continue

On the Maitre'D Back-Office screen, click on the P.O.S. Control icon.

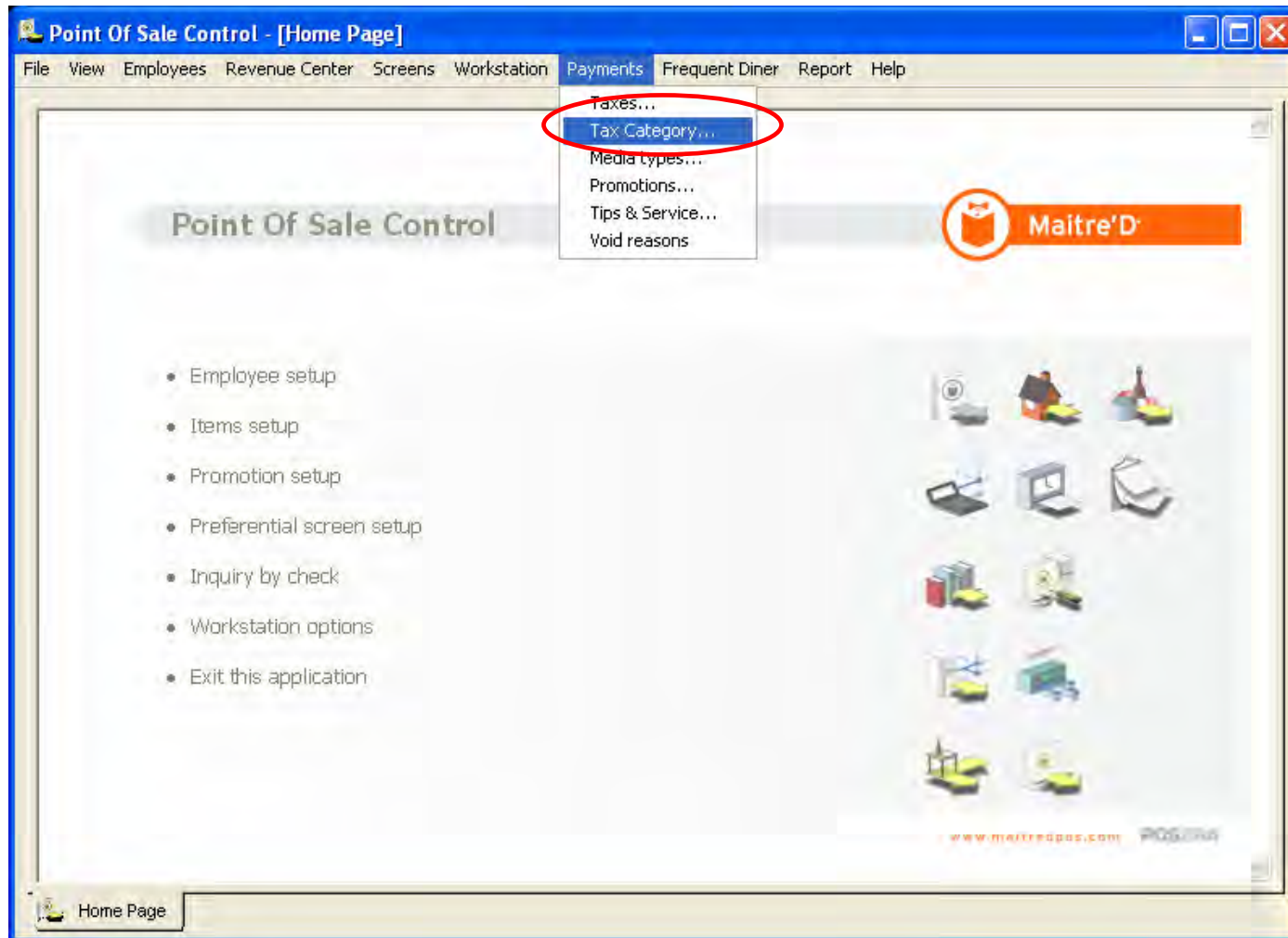




Step 1: Tax Category

Click to continue

Click on Payments, then click on Tax Category.

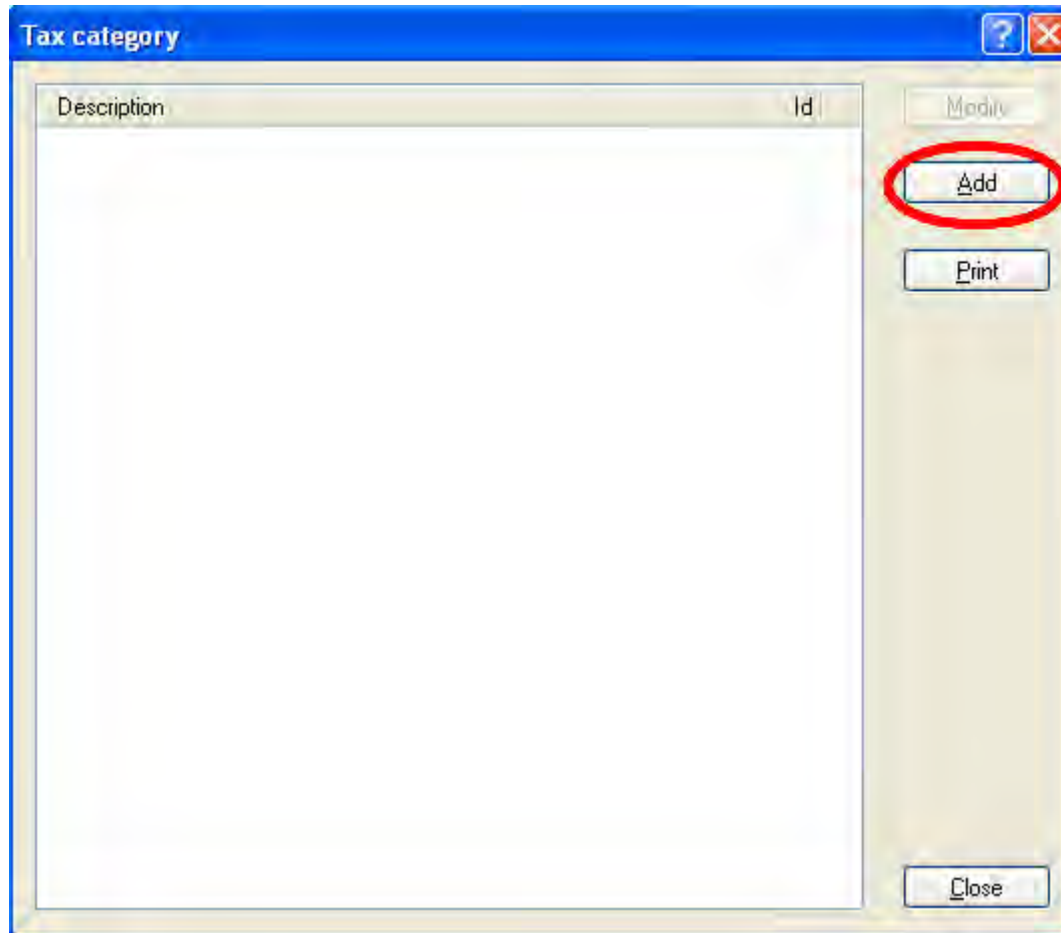




Step 1: Tax Category

Click to continue

Tax Categories control the grouping of taxes on reports.
Some examples of categories are "FOOD" and "LIQUOR", or "STATE" and "FEDERAL".
Click on ADD





Step 1: Tax Category

[Click to continue](#)

Enter a **Description** that will appear in the Report Center's tax reports.
Click on OK.

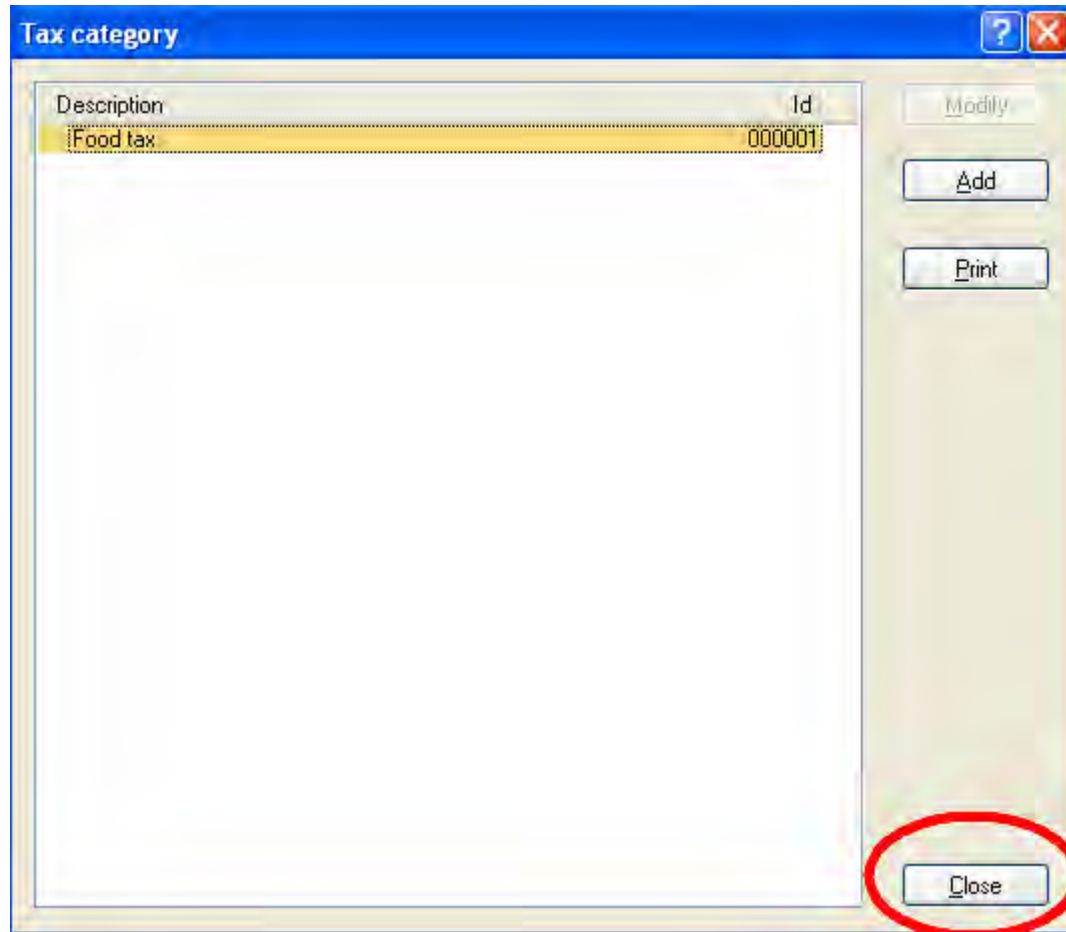
The screenshot shows a Windows-style dialog box titled "Tax Category - Record #1". It has a blue title bar with a question mark icon and a close button (X). The main area is light gray and contains a text input field labeled "Description" with the text "FOOD TAX" entered. Below the input field are three buttons: "OK", "Delete", and "Cancel".



Step 1: Tax Category

Click to continue

Click on CLOSE.





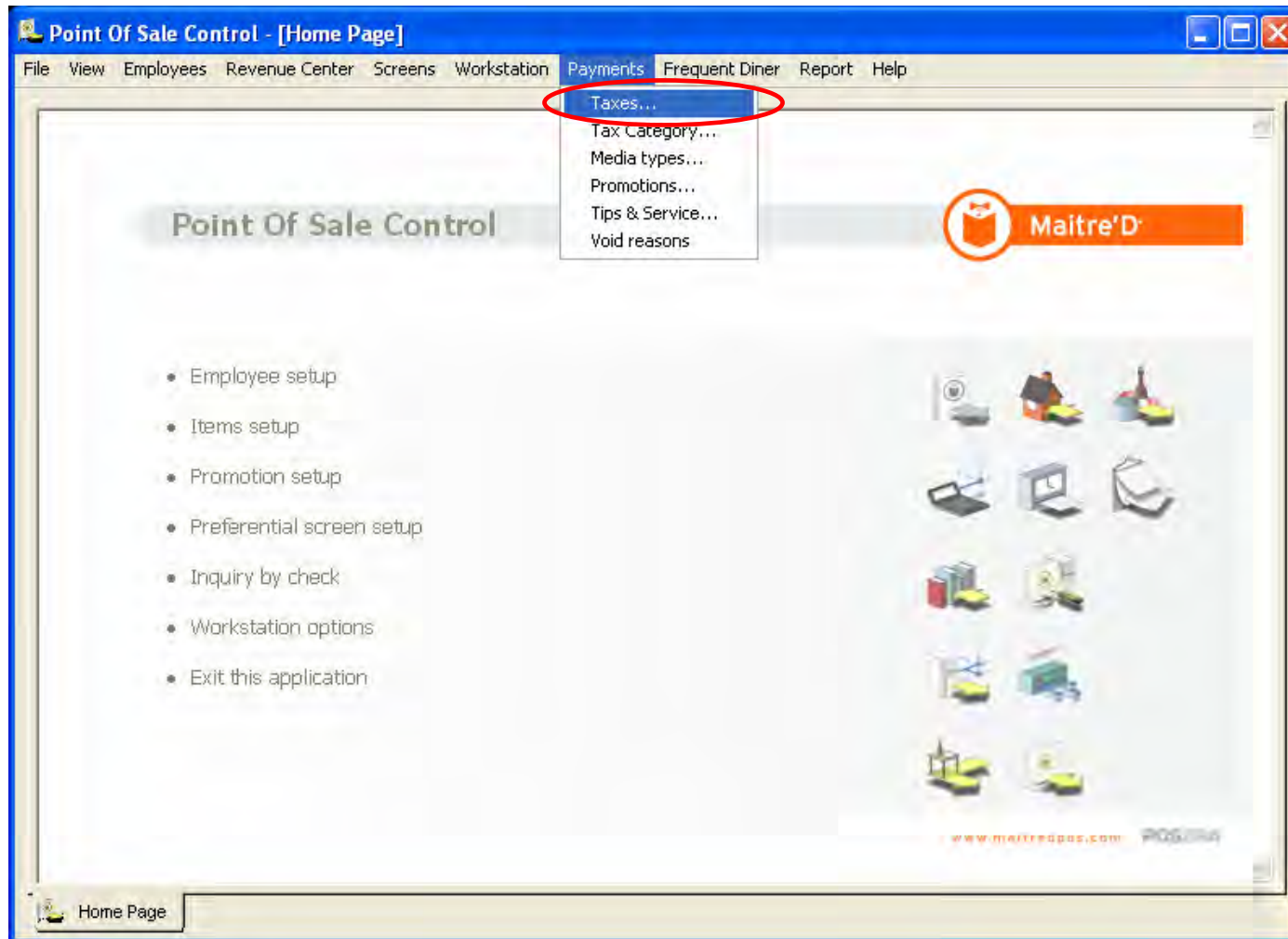
Step 2: Taxes



Step 2: Tax

Click to continue

Click on Payments, then click on Taxes.

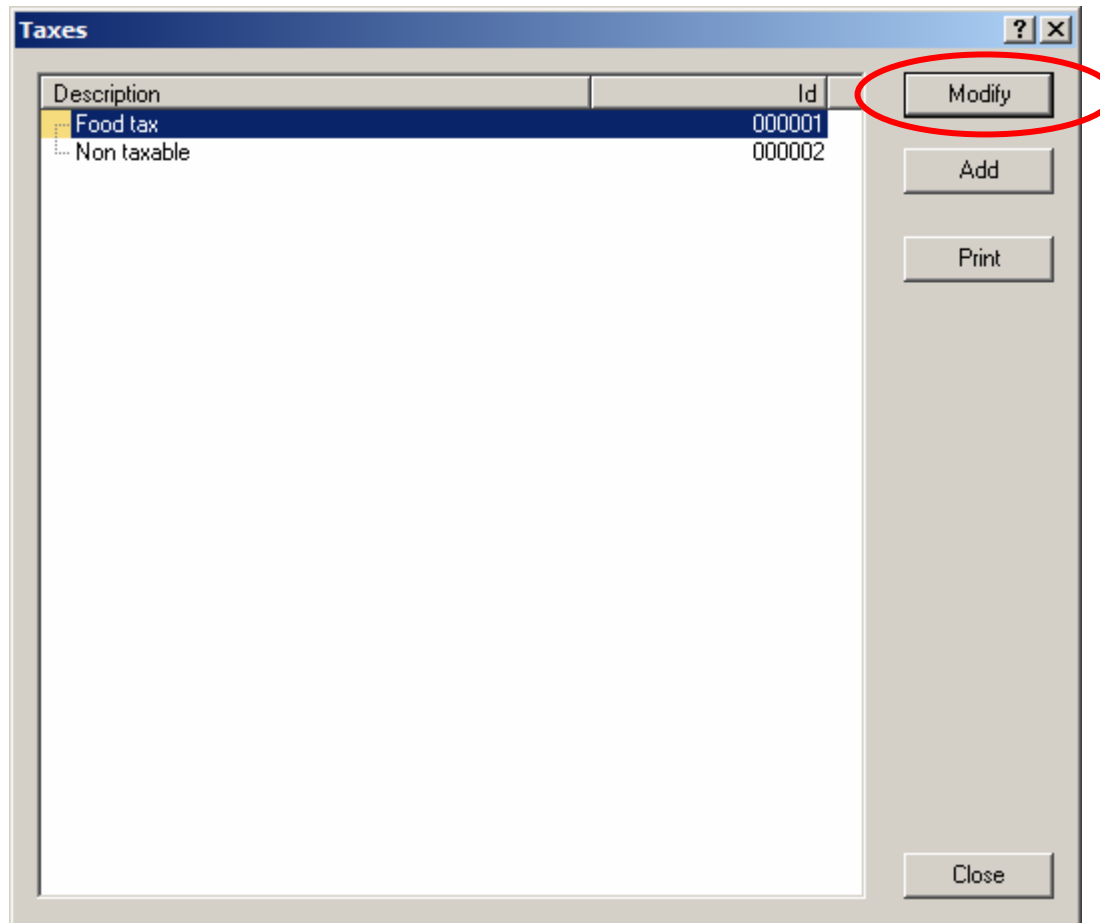




Step 2: Tax

Click to continue

Click on MODIFY





Step 2: Tax

[Click to continue](#)

Enter a **Description** that will be printed on reports and on the guests' checks.
Select the **Tax Category** this tax belongs to.
Click on Fixed Tax.

The screenshot shows a software window titled "Tax #1 - FOOD TAX". On the left is a tree view with the following items: Setup (selected), Fixed tax, Rate, Tax Table, Options, and Apply Tax on. The main area is titled "Setup" and contains two input fields: "Description" with the text "FOOD TAX" and "Category" with a dropdown menu showing "Food tax". A red oval highlights both the "Description" and "Category" fields. At the bottom of the window are three buttons: "Delete", "OK", and "Cancel".



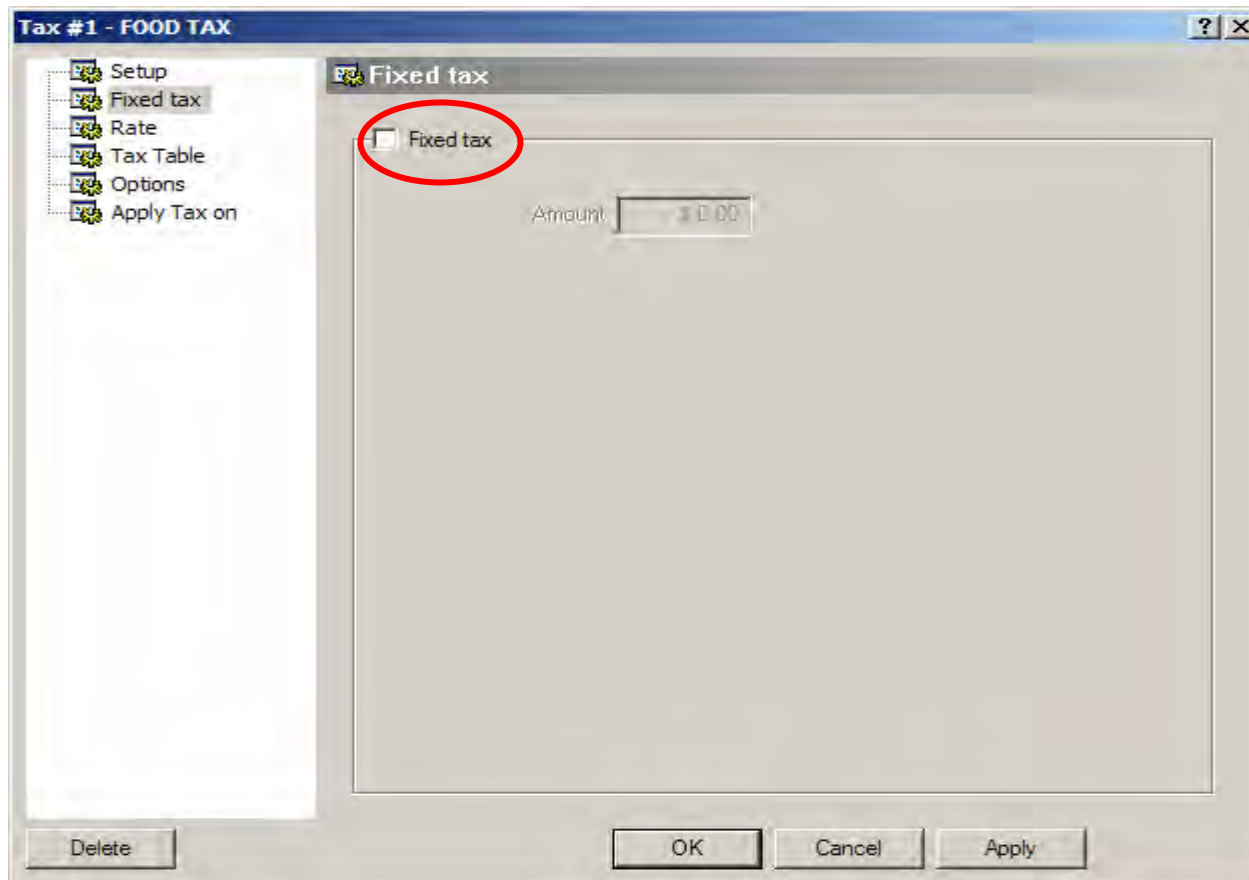
Step 2: Tax

[Click to continue](#)

The **Fixed Tax** option is only used for a fixed amount tax surcharge.

For each sales item that is part of a division on which such a tax applies, the fixed tax amount is added to the check.

Click on Rate.





Step 2: Tax

[Click to continue](#)

Enter a tax **Rate** in percent.

Select the **Special Mode Tax** which replaces this regular tax in special situations.

You could also define an **Upcoming Rate** change. Click on Tax Table.

The screenshot shows the 'Tax #1 - FOOD TAX' dialog box with the following fields and values:

- Current:**
 - Rate: 12.50000
 - Minimum Taxable: \$ 0.00
 - Special Mode Tax: Undefined
- Upcoming:**
 - Rate: 0.00000
 - Minimum Taxable: \$ 0.00
 - Date: 1/ 1/1950

The 'Upcoming' section is circled in red. The 'Rate' and 'Special Mode Tax' fields in the 'Current' section are also circled in red.

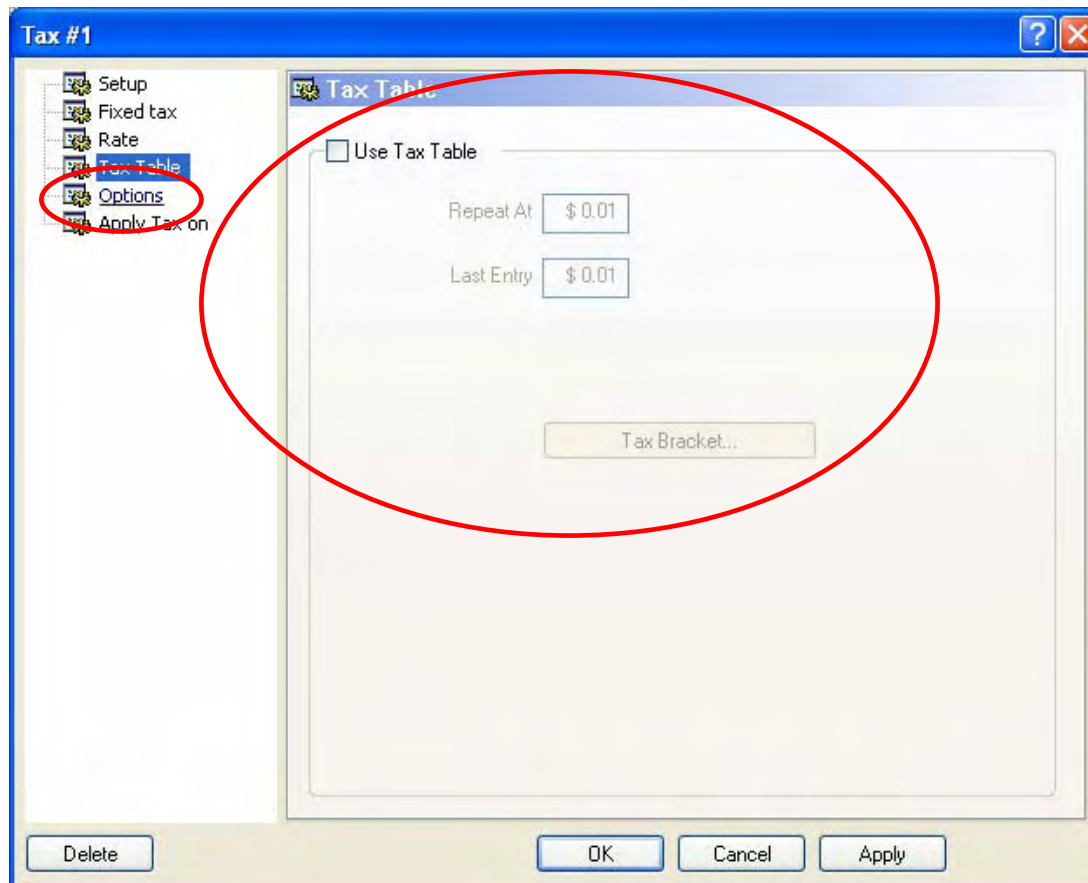


Step 2: Tax

Click to continue

The Tax Table option is only used for tax brackets.

Click on Options.

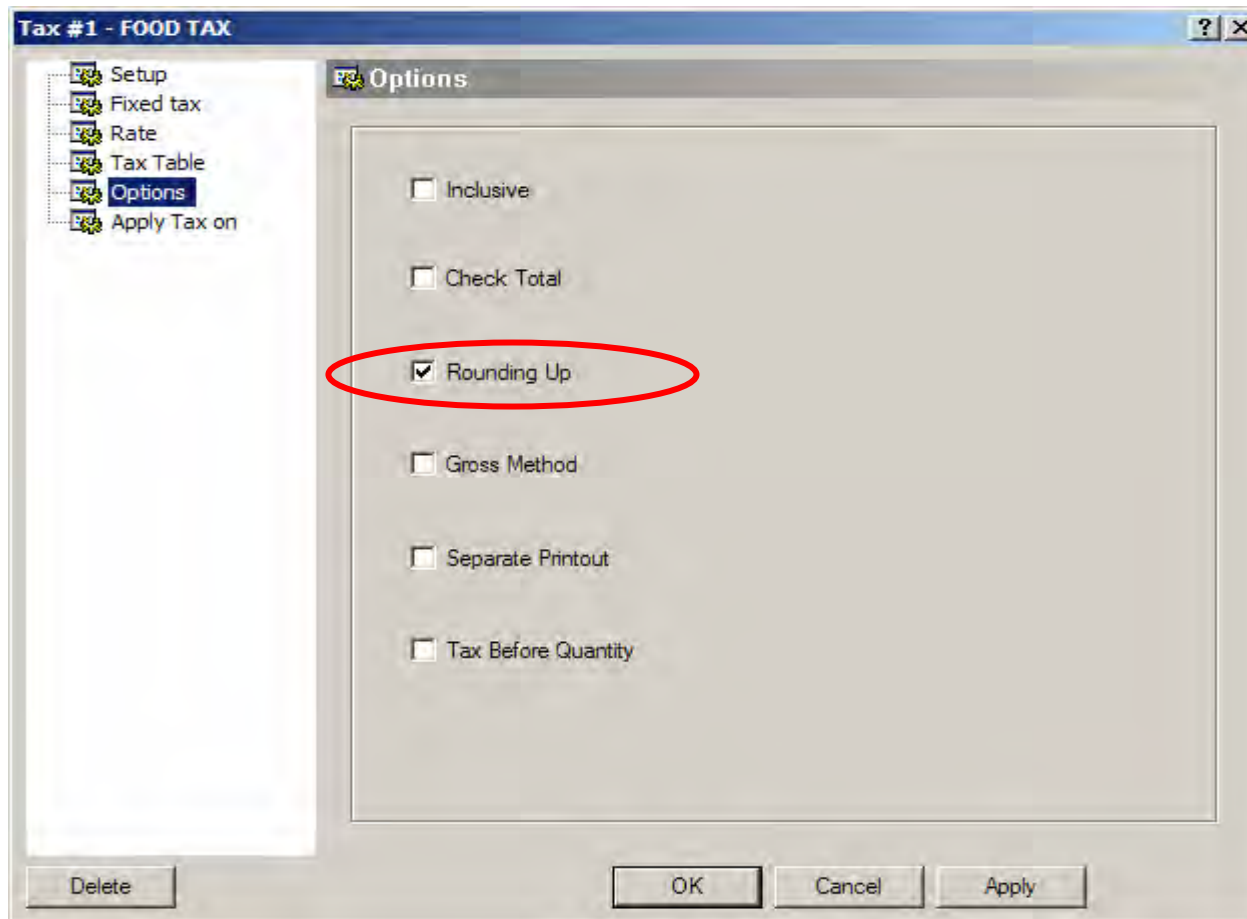




Step 2: Tax

[Click to continue](#)

These **Options** are used to define Rated Tax calculation methods. Select the different options needed for this tax, depending of the area you are in. This example is for the state of OZ, that uses a percentage rated tax. For specific information on each option, refer to the contextual help.

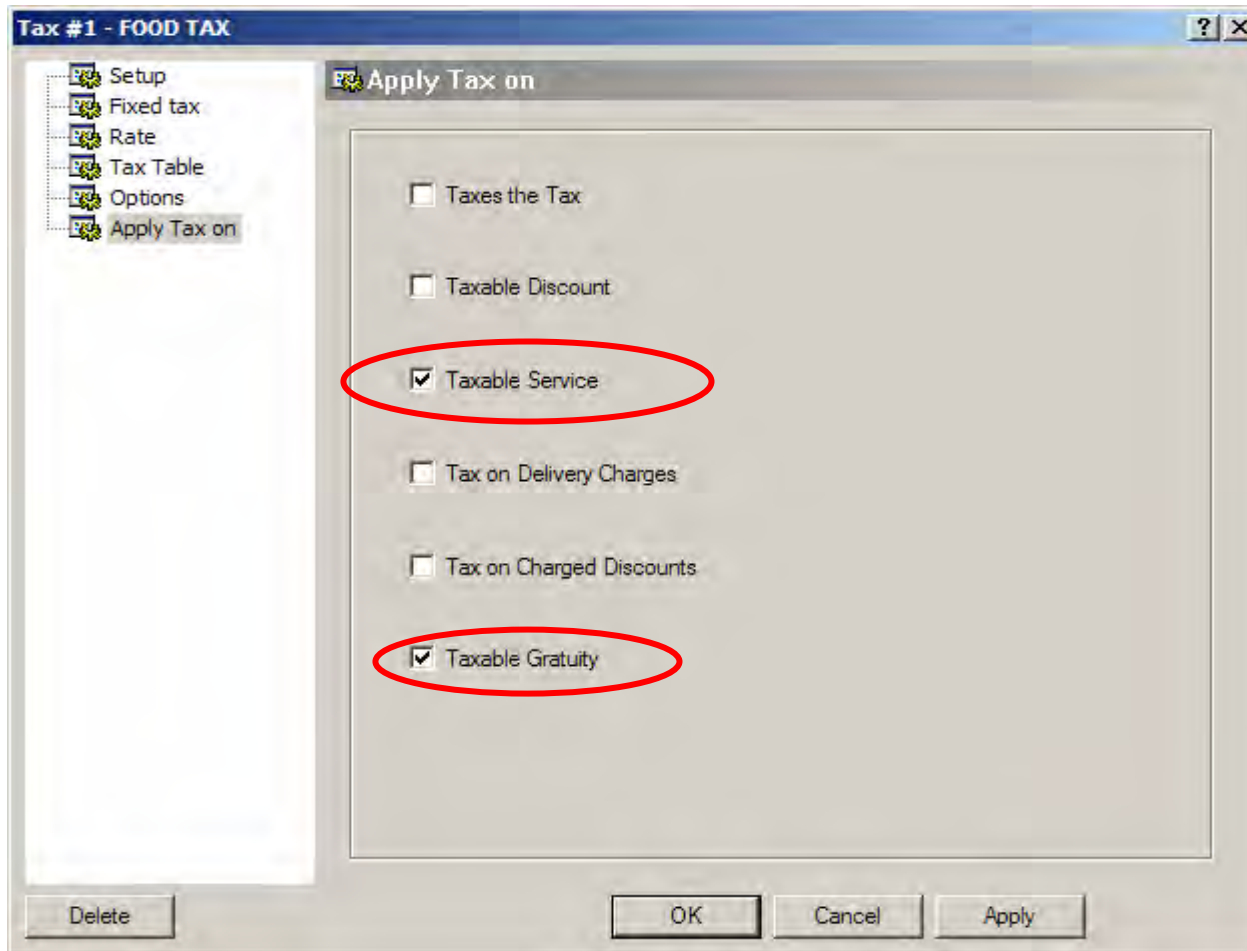




Step 2: Tax

[Click to continue](#)

The apply **On Tax** branch is used to define which elements of the check are affected by a Rated Tax.

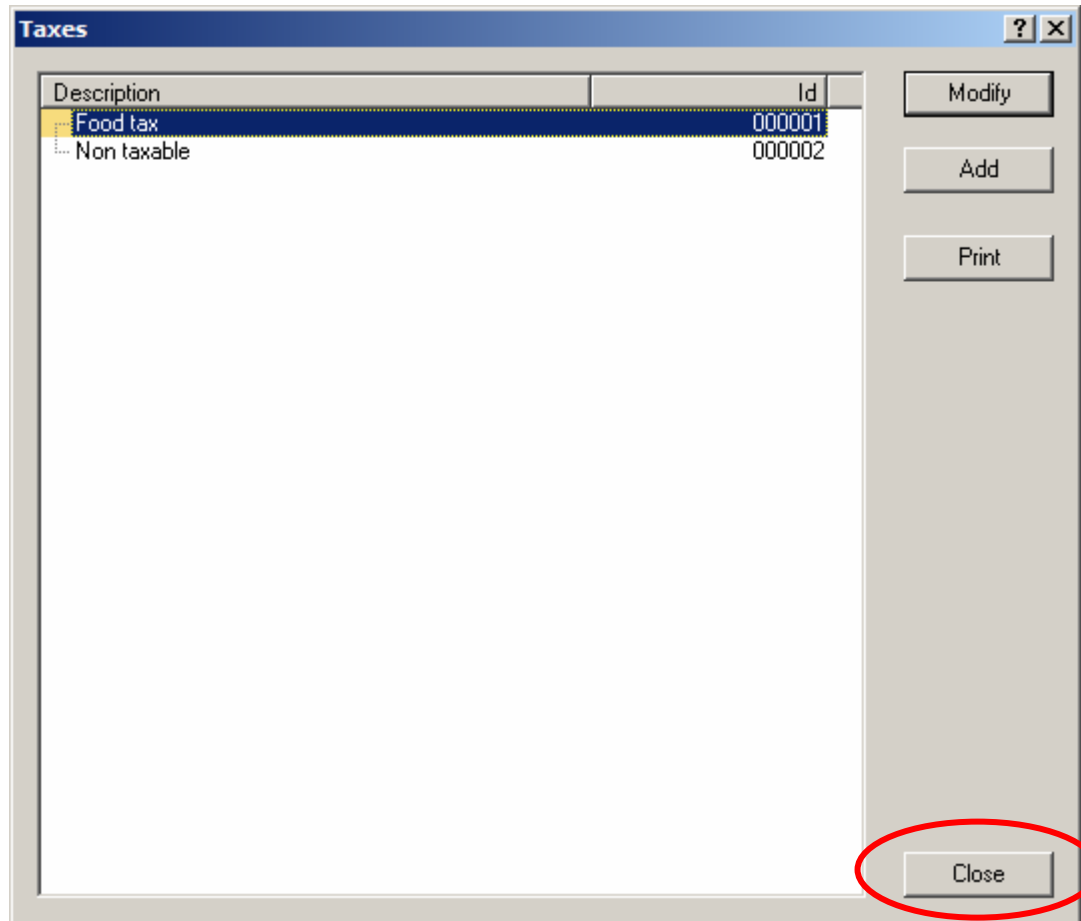




Step 2: Tax

Click to continue

Click on CLOSE.





This concludes the “Taxes” presentation.

We hope that this document helped you to understand the steps needed to setup Taxes in Maitre'D.

Refer to the “Divisions” presentations for explanation on associating sales with Taxes.