

Introduction

It is possible to add tax information to your items. Buyers in the Marketplace will see both the price including and excluding tax.

In order to view the tax information, both your organisation and the buyer organisation will need to be configured to use the same tax region.

Please review the [Quick Start Guide](#) (found [here](#)) for assistance in uploading content in detail. This guide only covers the addition of tax details.

Check valid codes:

In order to know which tax codes are valid, log into Basware Product Manager:



Click on the 'Tax' menu link:




A list of Tax territories will be displayed. Click on the 'eye' button to view the valid codes and associated rates:

Tax Territory directory

Search:

1-3 / 3

United Kingdom			
Standard rate code:	S	Number of rates:	4
Standard rate percentage:	20%		

The tax codes, name and rate are displayed. These cannot be edited.

VAT Details

United Kingdom

Code	Name	Tax rate	Default
S	Standard	20%	✓
R	Reduced	5%	
Z	Zero	0%	
E	Exempt	0%	

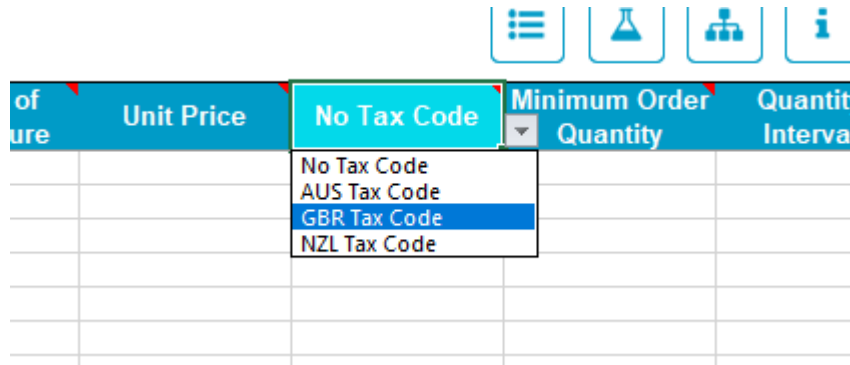
Adding Tax information – Supplier guide

Uploading content

Once you have reviewed the tax territory codes and know which ones to use, it is time to create your content and add the tax information.

Open the Content Loader (which can be downloaded from the Product Manager->ContentLoader page).

Select the tax territory to be used in the header drop down.



Add the desired tax code for each item (ensure you check the valid codes – see above). If a tax code is selected in the header, then a tax code must be entered for each item and cannot be left blank. If an item has no tax, please use a relevant tax code for a zero rate or an exempt item (see section above for checking valid codes).

Item Name	Item Type	Delivery Item ID	Delivery Type	Unit of Measure	Unit Price	GBR Tax Code	Min
Pack of four ballpoint pencils	Standard	NA	NA	PK	1.29	S	
Box of coloured pencils	Standard	NA	NA	PK	2.20	S	

Incorrect codes will be highlighted when the validation is run.

The next step is to upload the content (see Quick Start Guide [here](#) for details).

Reviewing tax information after uploading

Once the items have been uploaded, individual item tax information can be viewed in the user interface.

Go to the Price Lists page in Product Manager:



Locate the Price List that has just been uploaded (sorting by 'Last modified' should help if you have many Price Lists).

Price List Directory



The Tax territory is displayed in the Price List details. Click on the 'cog' icon for more information:

Stationary January

Reference:	Stationary January	Type:	Standard
Status:	Unpublished	Currency:	GBP
Keywords:		Items:	3
Tax:	VAT	Tax territory:	United Kingdom
Description:			



The tax details are also displayed in the Manage Price List page. Click on the 'cog' icon for 'Standard Items' to view tax information for individual items:

Manage price list



Stationary January

Reference:	Stationary January	Type:	Standard
Start date:		Currency:	GBP
Expiration Date:		Tax type:	VAT
Description:		Tax territory:	United Kingdom
Keywords:			

1. Delivery Items (No delivery charges have been added.)

2. Standard Items (3 Items added)



Adding Tax information – Supplier guide

Each item in the Price List is displayed, the tax rate for each item is shown:

Box of coloured pencils

Supplier Item ID: 5A678
 Status: **Added**
 Item is available:

Order unit: Pack
 Price: 2.20 GBP (1 Price Break)
 Tax code: [S] Standard, 20%



Lead pencil pack

Supplier Item ID: A464
 Status: **Added**
 Item is available:

Order unit: Pack
 Price: 1.20 GBP (1 Price Break)
 Tax code: [S] Standard, 20%



Clicking on the 'pencil' icon above will allow you to edit the tax rate (in addition to other item details):

Manage price list item

Cancel
Save

Stationary January

Name: Box of coloured pencils
 Supplier Item ID: 5A678 Available:
 Description: 6 coloured pencils

Number of base units: *

Order unit: *

Order increments: *

Tax code: *

[S] Standard, 20%
 [S] Standard, 20%
 [R] Reduced, 5%
 [Z] Zero, 0%
 [E] Exempt, 0%

Price Breaks Price on request

Once you are satisfied with the tax information, the Price List can be attached to the Agreement sent from the buyer and published for review (see Quick Start Guide [here](#) for details).