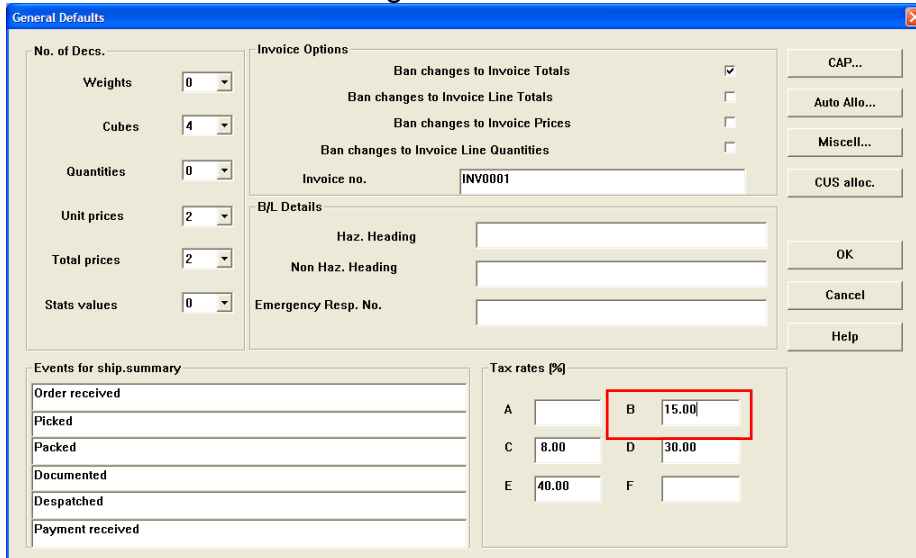


## How to change the VAT rate in Spex PC

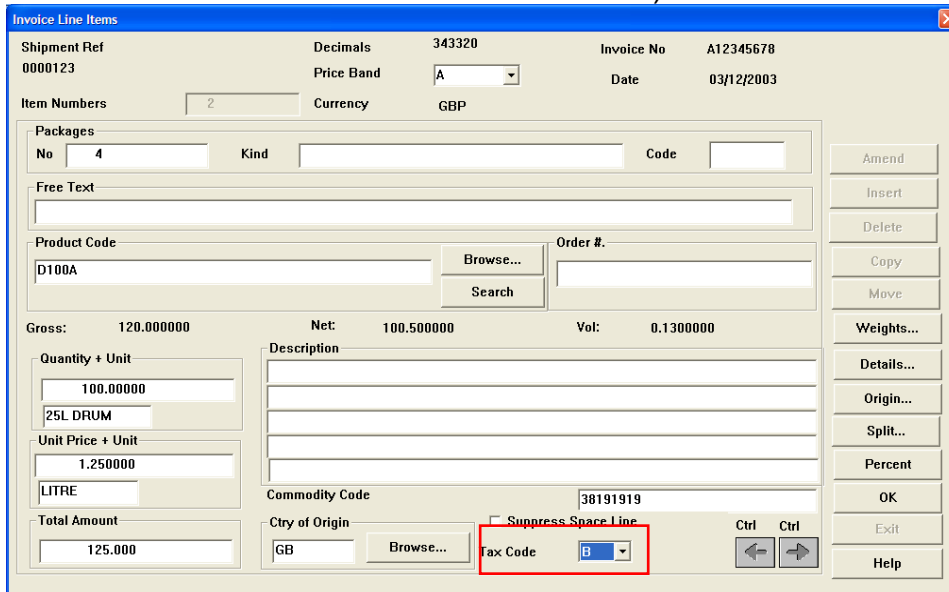
You will need to apply this procedure if Spex is automatically calculating the VAT and therefore is configured as follows:

- A VAT code defined in Configuration \ General Defaults



Tax rates (%)	
A	B 15.00
C 8.00	D 30.00
E 40.00	F

- A VAT code added to the Invoice Lines (or VAT code added to the Product and then inherited on the Invoice Line)



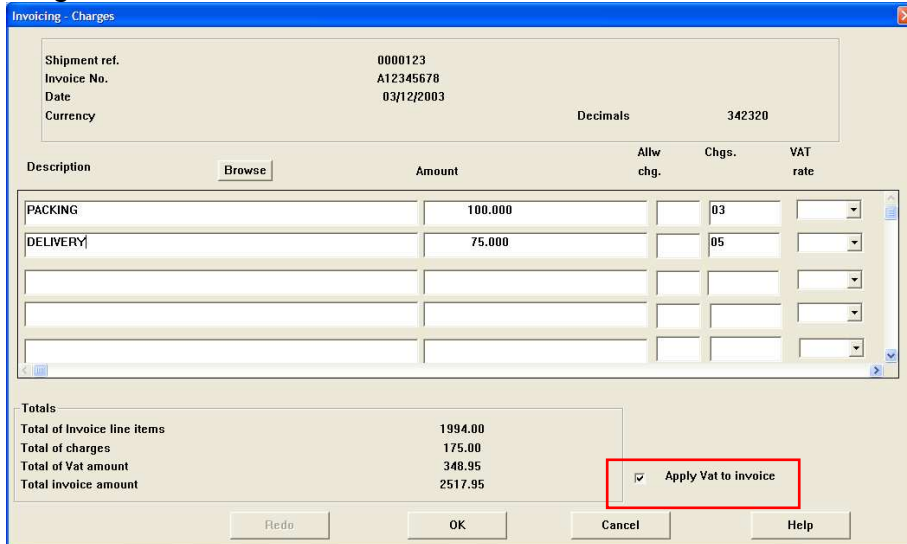
Shipment Ref: 0000123    Decimals: 343320    Invoice No: A12345678  
 Price Band: A    Date: 03/12/2003  
 Item Numbers: 2    Currency: GBP

Gross: 120.000000    Net: 100.500000    Vol: 0.1300000

Quantity + Unit: 100.00000  
 25L DRUM  
 Unit Price + Unit: 1.250000  
 LITRE  
 Total Amount: 125.000

Product Code: D100A    Order #:   
 Description:   
 Commodity Code: 38191919  
 Ctry of Origin: GB  
 Suppress Space Line:    
 Tax Code: B

- “Apply VAT to invoice” checkbox ticked and a VAT amount in the Invoice Charges screen



Shipment ref. 0000123  
 Invoice No. A12345678  
 Date 03/12/2003  
 Currency Decimals 342320

Description	Amount	Allw chg.	Chgs.	VAT rate
PACKING	100.000		03	
DELIVERY	75.000		05	

Totals

Total of Invoice line items	1994.00
Total of charges	175.00
Total of Vat amount	348.95
Total invoice amount	2517.95

Apply Vat to invoice

Buttons: Redo, OK, Cancel, Help

If Spex is **interfaced** with the main ERP system and the VAT rate is transferred across then the VAT should be changed in the ERP system and/or in the interface. If you have any doubts or questions please don't hesitate to contact the support department.

There are two possible methods of dealing with the change of VAT:

1. Switch to the previous VAT code
2. Replace the existing VAT with the new one

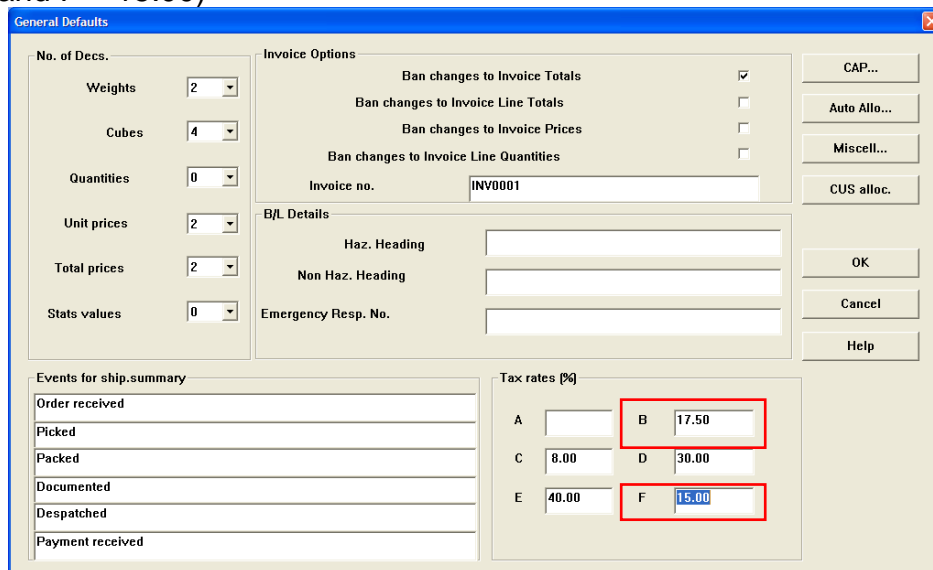
These are explained further in the following sections:

## 1. Switch to the previous VAT code

The main advantage of this method is that both the old and the new VAT rates are kept in Spex. The main disadvantage is that if the VAT rates are linked with the Products then the new rate will have to be re-linked instead.

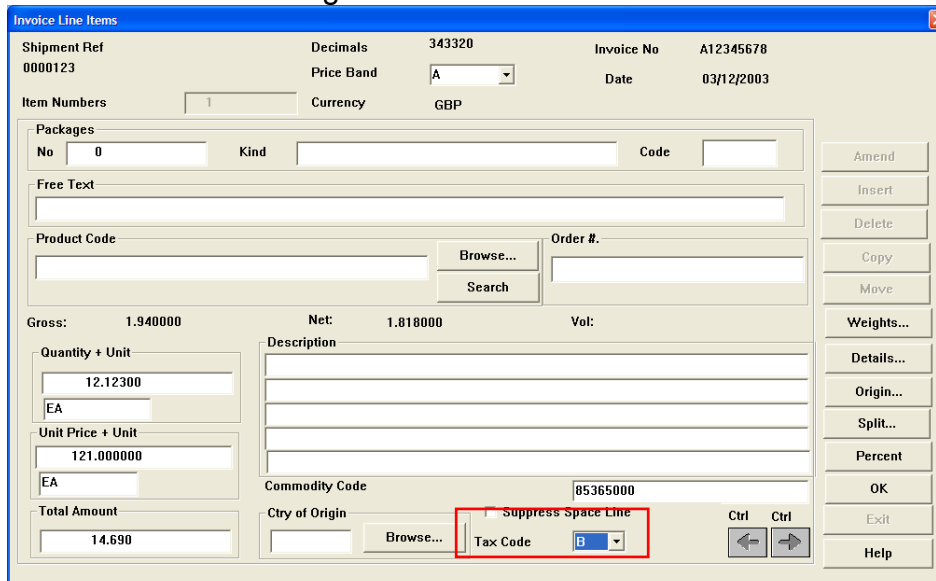
In order to implement this method please proceed as follows:

- Check both VAT codes in Configuration \ General Defaults (e.g. B = 17.50 and F = 15.00)



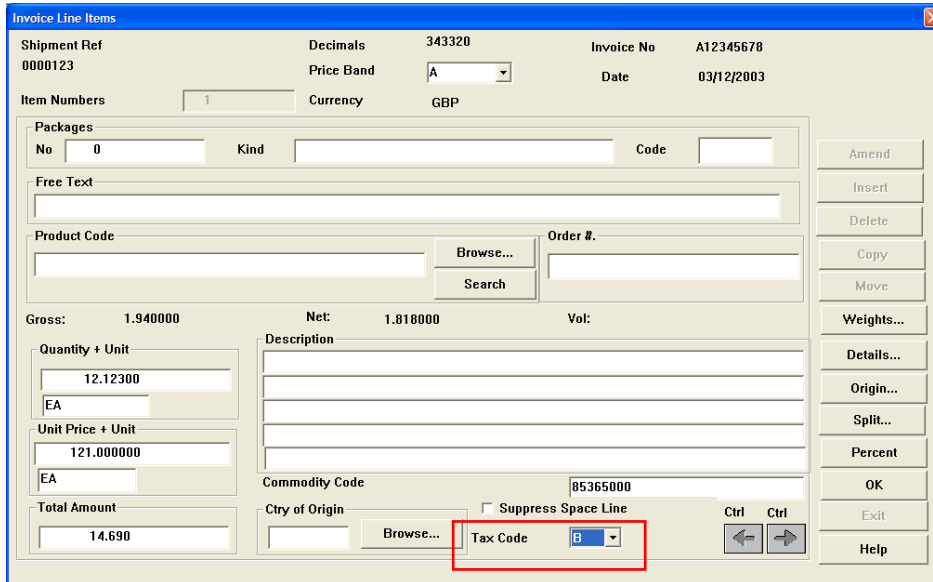
The screenshot shows the 'General Defaults' dialog box. In the 'Tax rates (%)' section, the values for VAT codes B (17.50) and F (15.00) are highlighted with red boxes. Other sections include 'Invoice Options', 'B/L Details', and 'Events for ship.summary'.

- Open the Products database and Browse and select each relevant Product and then change the VAT Code back from F to B:



The screenshot shows the 'Invoice Line Items' dialog box. The 'Tax Code' field is highlighted with a red box and set to 'B'. Other fields include 'Shipment Ref', 'Invoice No', 'Price Band', 'Date', 'Gross', 'Net', 'Vol', 'Quantity + Unit', 'Unit Price + Unit', 'Total Amount', 'Commodity Code', and 'Ctry of Origin'.

- If the VAT rate is not linked with the Product then please ensure you use the new VAT on the Invoice Lines



Invoice Line Items

Shipment Ref: 0000123    Decimals: 343320    Invoice No: A12345678  
Price Band: A    Date: 03/12/2003  
Item Numbers: 1    Currency: GBP

Packages: No: 0    Kind:    Code:    Amend

Free Text:    Insert

Product Code:    Browse...    Order #:    Delete

Search

Gross: 1.940000    Net: 1.818000    Vol:    Copy

Move

Quantity + Unit: 12.12300    Description:    Weights...

EA    Details...

Unit Price + Unit: 121.000000    Origin...

EA    Split...

Total Amount: 14.690    Commodity Code: 85365000    Percent

OK

Ctry of Origin:    Browse...    Suppress Space Line    Ctrl    Ctrl    Exit

Tax Code: 0    Help

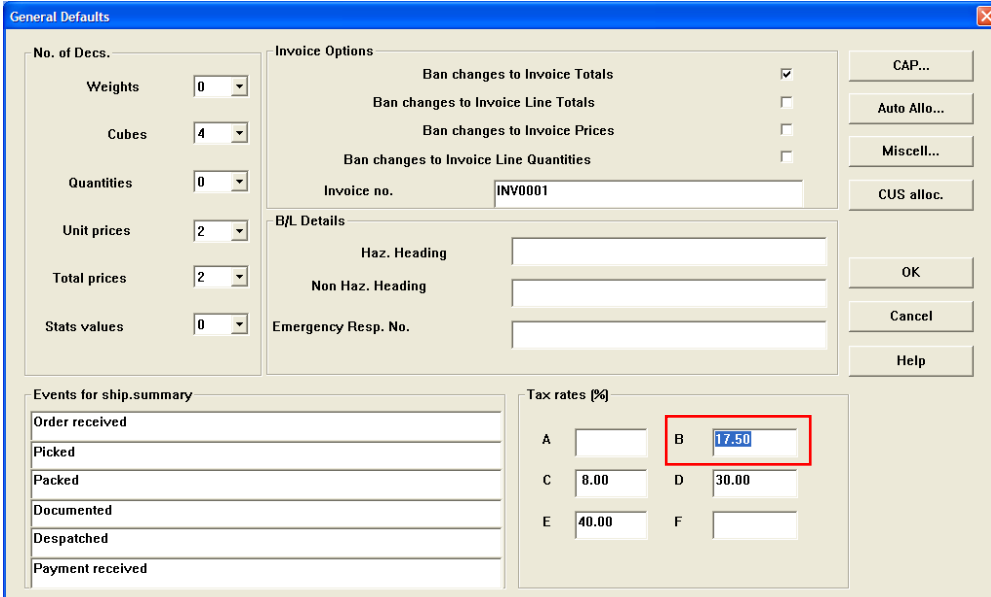
## 2. Replace the existing VAT with the new one

The main advantage of this method is that it is very quick to implement.

The main disadvantage is that Spex will automatically apply the new VAT rate to a shipment if any changes are made or even if the Invoice Lines are only viewed.

Therefore please **DO NOT** open or even attempt to change any info on any old shipments as it will automatically recalculate the VAT amount (based on the new rate).

In order to implement this method please go to Configuration \ General Defaults and replace the existing VAT value with the new one (e.g. 15.00 becomes 17.50):



No. of Decs.		Invoice Options	
Weights	0	Ban changes to Invoice Totals	<input checked="" type="checkbox"/>
Cubes	4	Ban changes to Invoice Line Totals	<input type="checkbox"/>
Quantities	0	Ban changes to Invoice Prices	<input type="checkbox"/>
Unit prices	2	Ban changes to Invoice Line Quantities	<input type="checkbox"/>
Total prices	2	Invoice no.	INV0001
Stats values	0	B/L Details	
Events for ship.summary		Haz. Heading	
Order received		Non Haz. Heading	
Picked		Emergency Resp. No.	
Packed		Tax rates (%)	
Documented		A	
Despatched		B	17.50
Payment received		C	8.00
		D	30.00
		E	40.00
		F	

Any new shipments created after the above change is made will use the new VAT rate.