

Reconfiguring Taxable Items

for MLSD practices

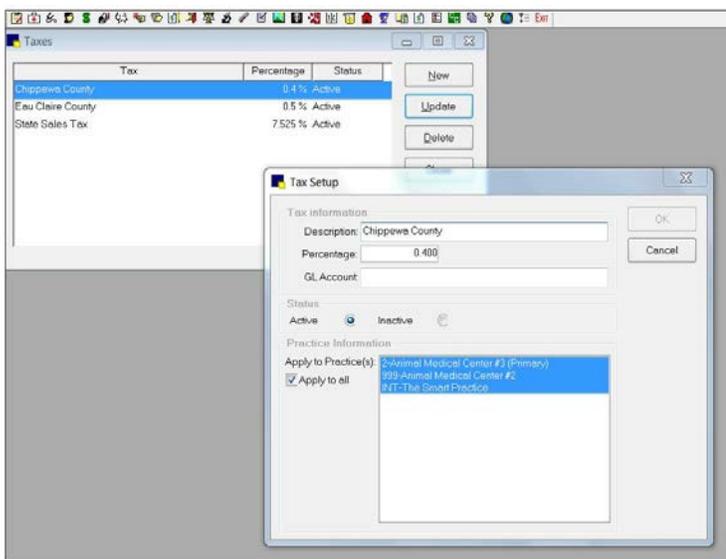
In Cornerstone Software 8.7 NEXT, practices configured for Multiple Location/Single Database (MLSD) that have different tax rates per location can now have the correct sales tax applied, based on the logged-in practice. This eliminates the need for staff to select the tax when invoicing or to have multiple, location-specific invoice items to select from.

To implement this new functionality, you must:

1. Update your sales taxes by assigning the appropriate practice(s) per tax.
2. Identify current taxable items.
3. Reconfigure taxable items, based on current usage.

Update sales tax setup

For each sales tax, assign the practice(s) under **Controls > Taxes**. You can also select the **Apply to all** check box.



Identify current taxable items

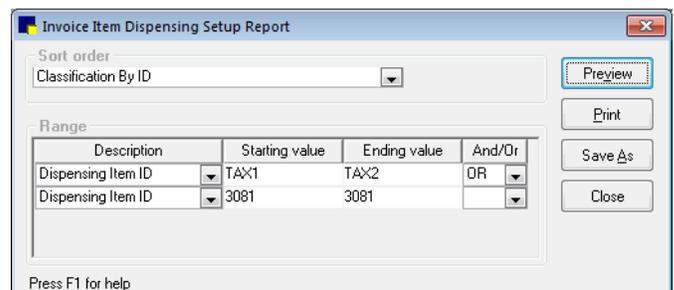
Based on how your items are currently set up to apply sales tax, you must use one or both of the following reports to identify your currently taxed items.

If using dispensing items...

Run the Invoice Item Dispensing Setup Report:

1. Sort the report by **Classification By ID**.
2. In the Range area, select either **Dispensing Item ID** or **Dispensing Item Description**.
3. Enter the starting and ending values based for each range selection. If needed, add multiple ranges using **Or** after each range row if IDs or descriptions are not sequential.

Keep this report as a record of your current setup, before reconfiguring the taxes.

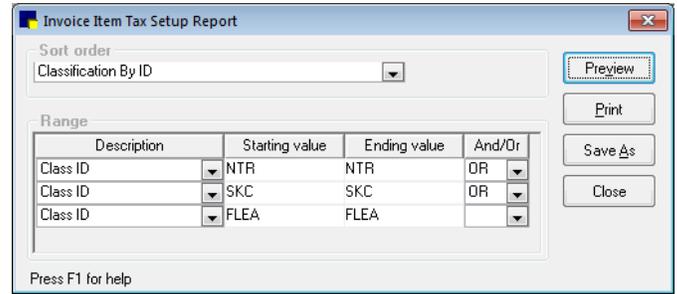


If using duplicate items (practice/location specific) or if manually selecting the tax during billing...

Run the Invoice Item Tax Setup Report:

1. Sort the report by **Classification By ID**.
2. Under Range, select **Class ID** as the description.
3. Enter the starting and ending values for each range selection. If needed, add multiple ranges using **Or** after each range row if IDs are not sequential.
4. Export to a spreadsheet, and filter out any items with a tax description of **Not Taxable**.

Keep this report as a record of your current setup, before reconfiguring the taxes.



Reconfigure taxable item setup

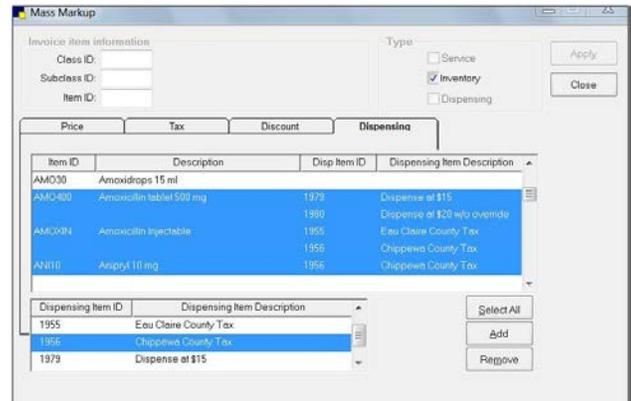
Based on current usage, you must either remove dispensing items used for location-based taxes, and/or add all applicable sales taxes per item[†] using the Mass Markup tool for efficiency.

Note: To use Mass Markup, you must have exclusive use of the Cornerstone software (only one workstation on the network can be logged into Cornerstone), and all other windows and applications on the logged-in workstation must be closed. Make sure you have a current backup before proceeding!

If using dispensing items...

Remove the dispensing items associated with the results from the Invoice Item Dispensing Setup Report:

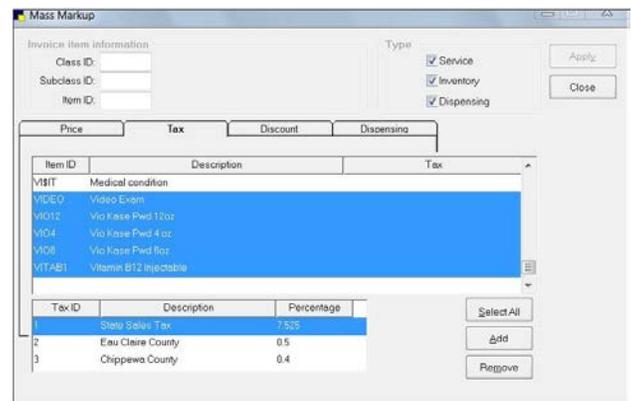
1. Select the **Dispensing** tab.
2. (Optional) Filter the list by class and subclass, if applicable.
3. Highlight specific items in the list, or click **Select All**.
Tip: The list of items is in ID order and should match your report if you ran it in ID order.
4. In the bottom window, select one of the dispensing items used in the report and click **Remove**.
5. Repeat for each of the dispensing items related to taxes, and then click **Apply** to save all changes.



If using duplicate items (practice/location specific) or if manually selecting tax during billing...

Add all applicable sales taxes per item[†] based on the results of the Invoice Item Tax Setup Report:

1. Select the **Taxes** tab.
2. Filter the list by class and subclass, if applicable, or display only inventory items using the **Type** box.
3. Highlight specific items in the list or click **Select All**.
Tip: The list of items is in ID order and should match your report if you ran it in ID order.
4. In the bottom window, select one of the tax IDs used in the report and click **Add**.
5. Repeat for each of the Tax IDs, and then click **Apply** to save all changes.



[†] If currently using practice- or location-specific (duplicate) items with the applicable tax applied, follow the steps above to apply tax to the single item to be retained and inactivate the duplicate items to reduce the overall number of invoice items.

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