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VAT Rate Change

This Manual will assist and guide on the change of a VAT Rate using Effectivity Groups to allow for future changes without manual intervention.

Micros South Africa – April 2025
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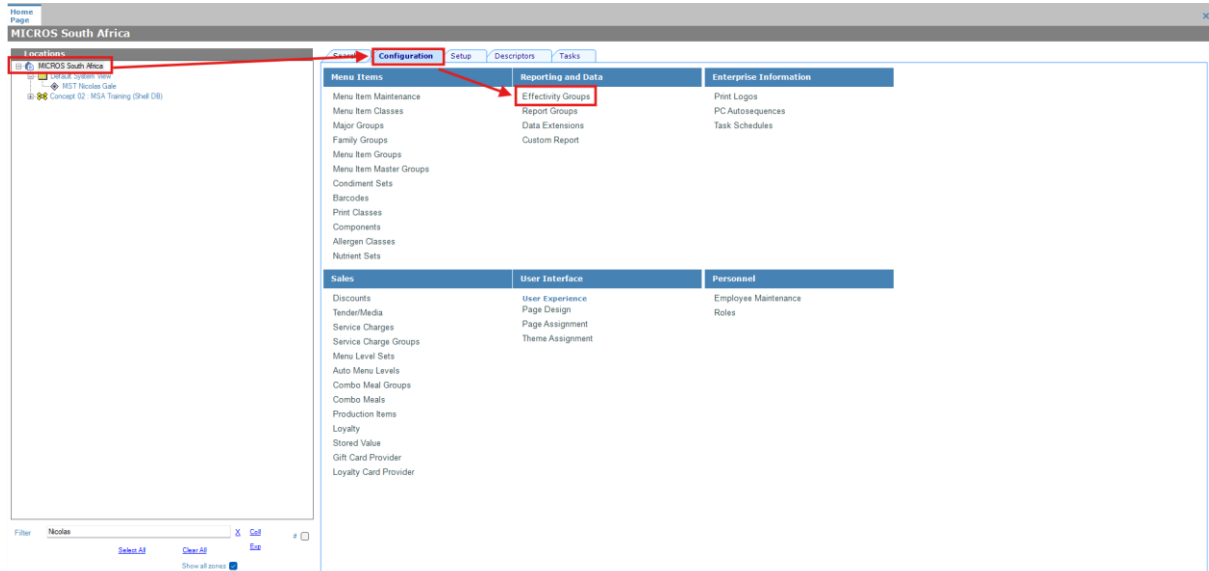
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Creating Effectivity Groups

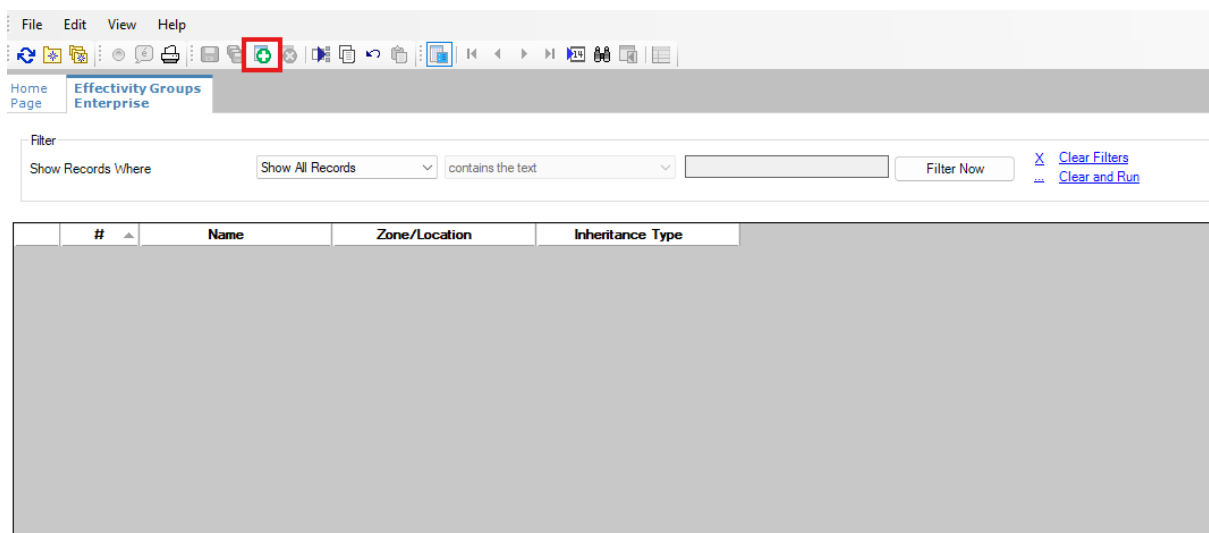
Navigate following the steps below

Enterprise -> Configuration -> Effectivity Groups

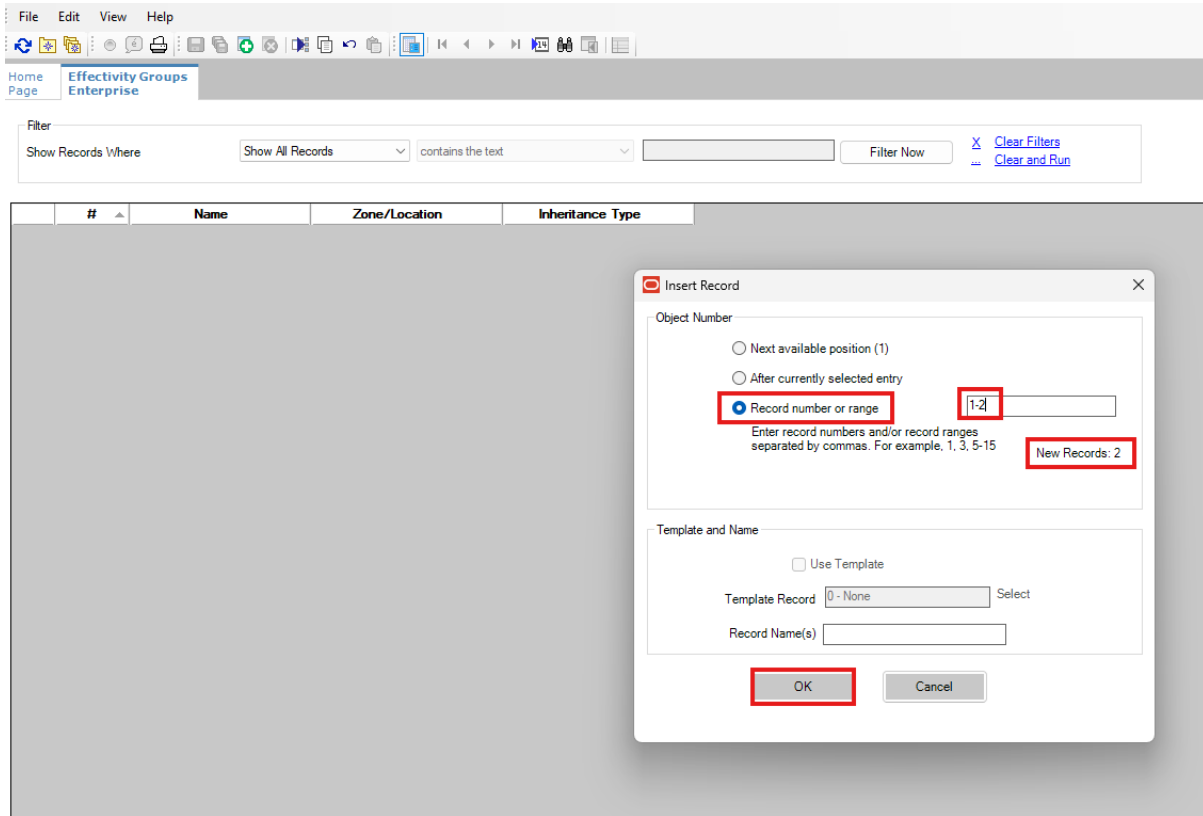


Once the Module is open, you will need to add effectivity records.

- To efficiently use effectivity, you will need 2 x Effectivity Records, namely a Start and an End.

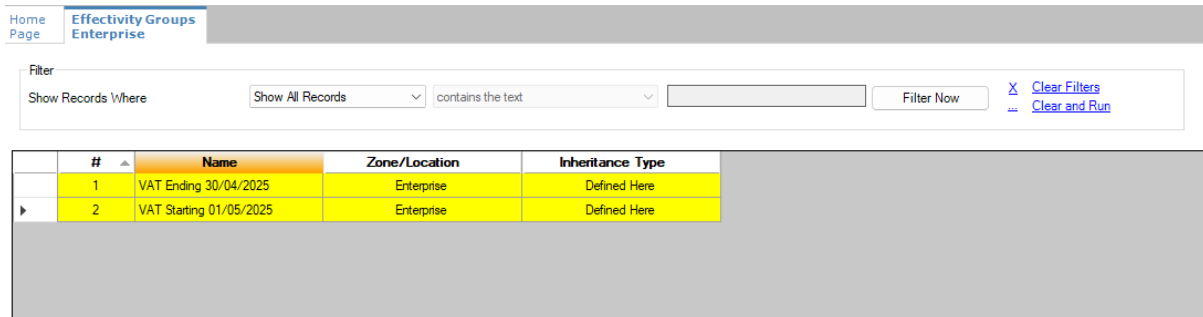


Once you have selected Insert, follow the prompts below to add 2 x effectivity records

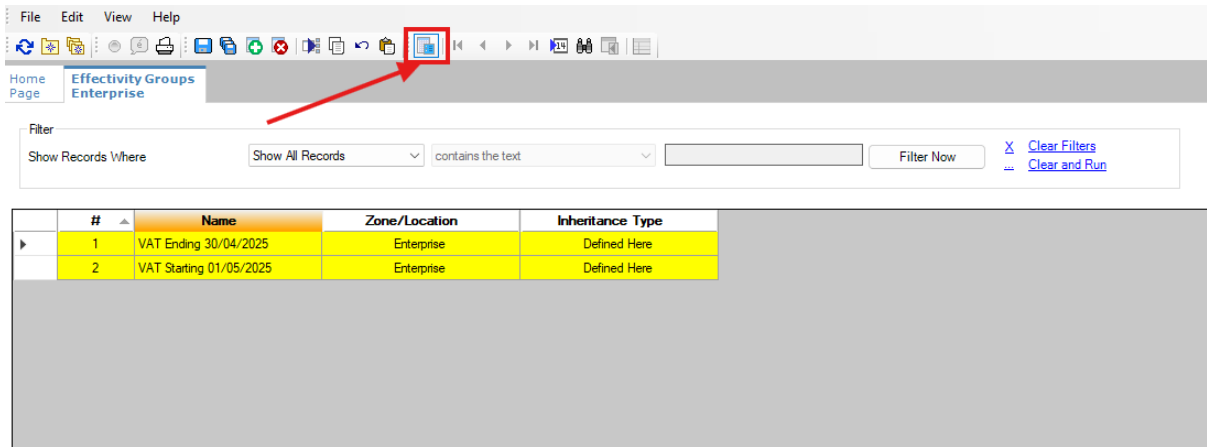


Once the records have been created, you will now need to name them and then define how they will work.

For the specific VAT Change effective 1st May 2025, please see below.



Change your view from table view to form view to edit the effectivity records.

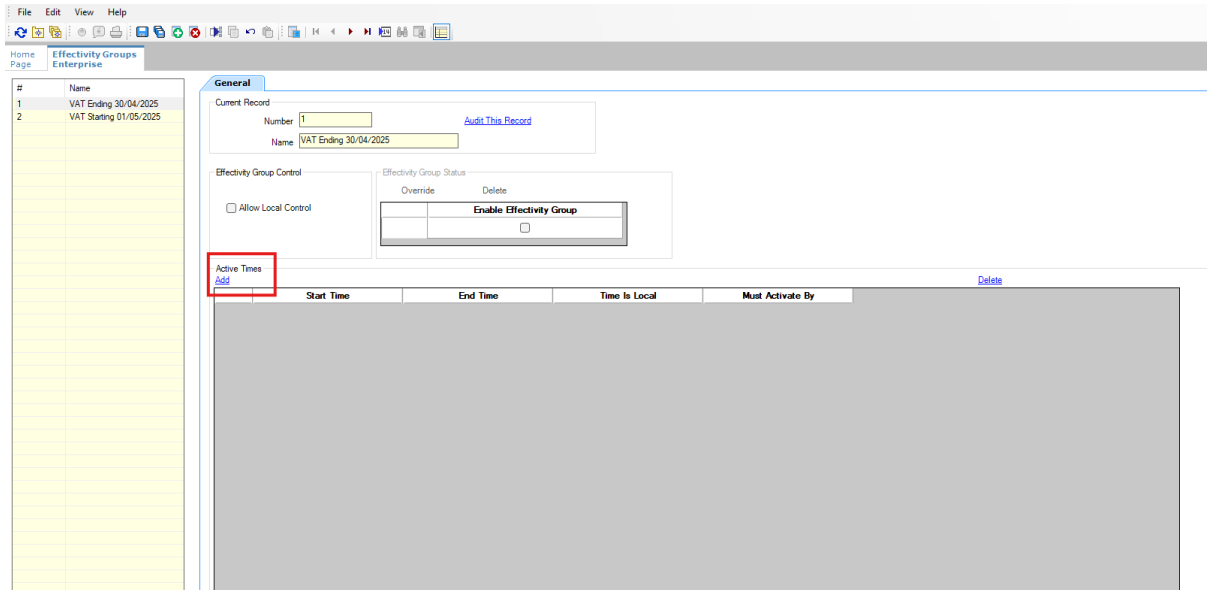


#	Name	Zone/Location	Inheritance Type
1	VAT Ending 30/04/2025	Enterprise	Defined Here
2	VAT Starting 01/05/2025	Enterprise	Defined Here

Once done, here you will see the Configurable sections of the effectivity record,

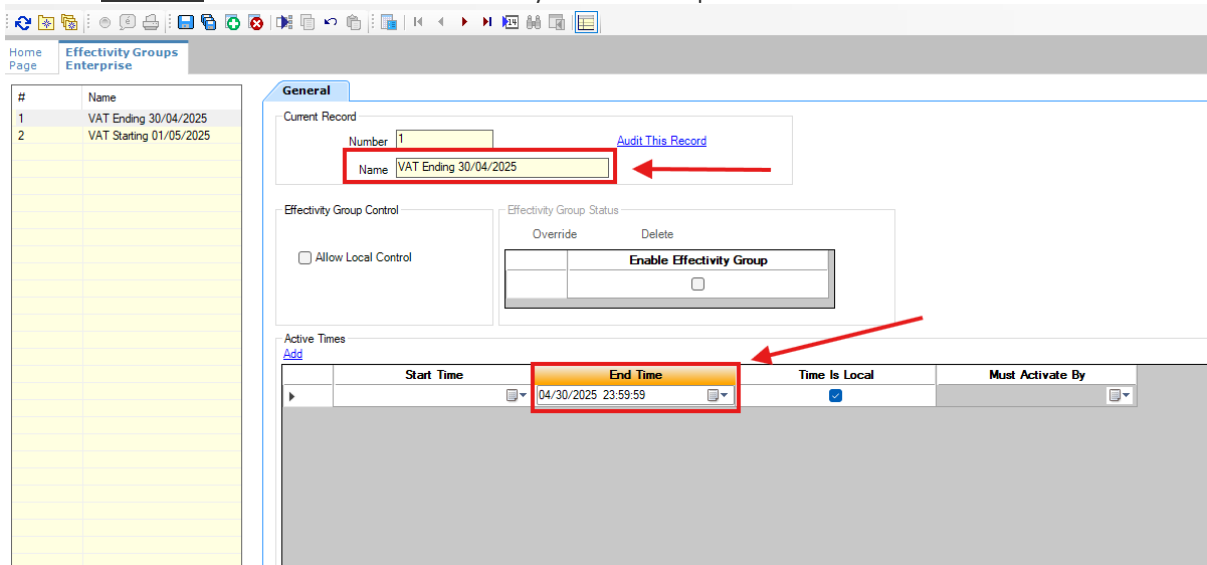
You will now need to define the Active Times to end the existing VAT Rate and Start the New VAT Rate.

Setting the End Time & Date for Effectivity

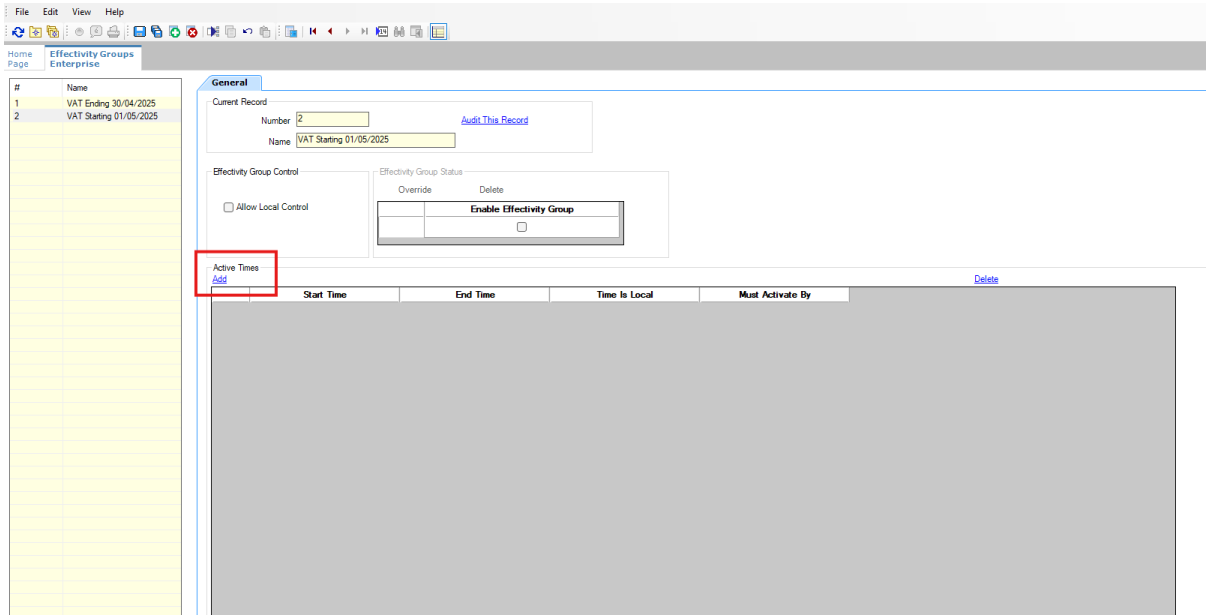


Once Added, define as per the screenshot below

- Name as per the reason for the effectivity
- **End Time** to cater to when the effectivity record will expire

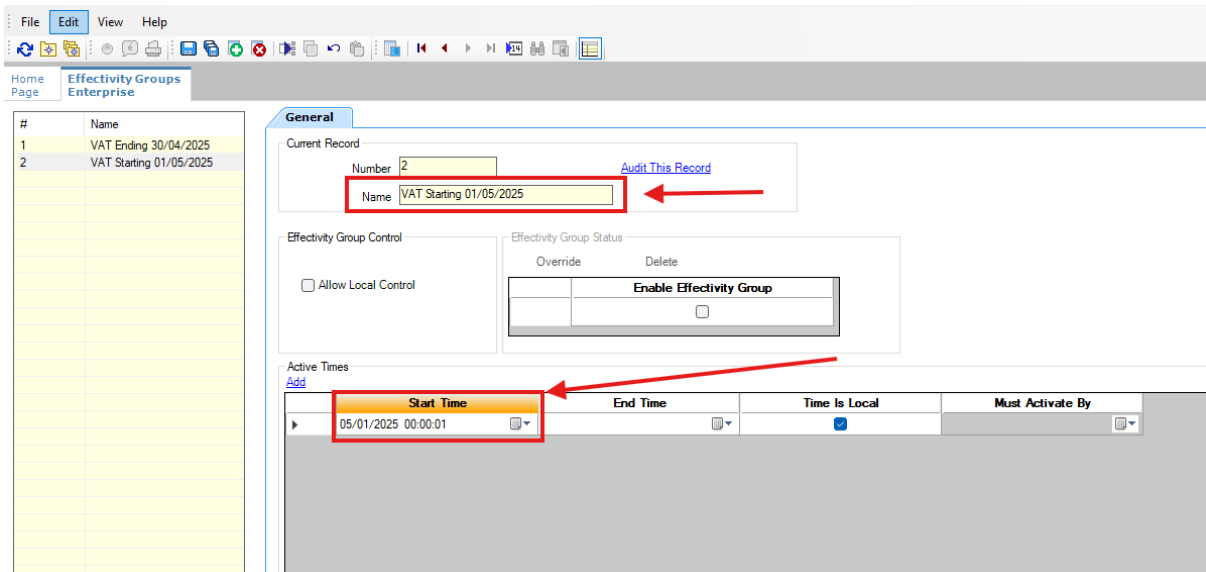


Setting the Start Time & Date for Effectivity



Once Added, define as per the screenshot below

- Name as per the reason for the effectivity
- **Start Time** to cater to when the effectivity record will start

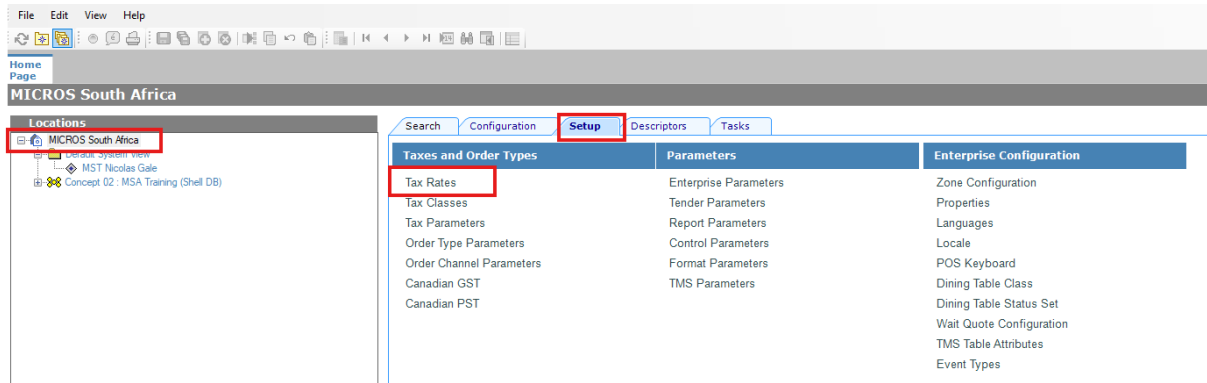


Save all changes

Applying Effectivity Records to VAT Rates

Navigate following the steps below

Enterprise -> Setup -> Tax Rate

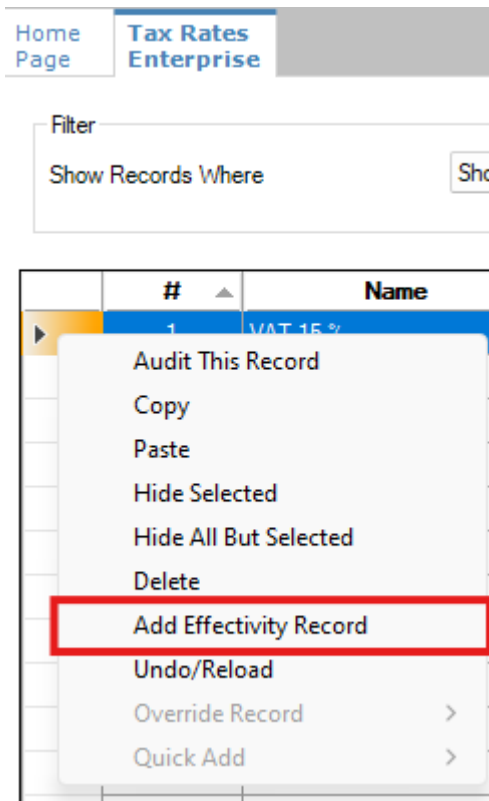


Once Tax Rates are opened you will see the below

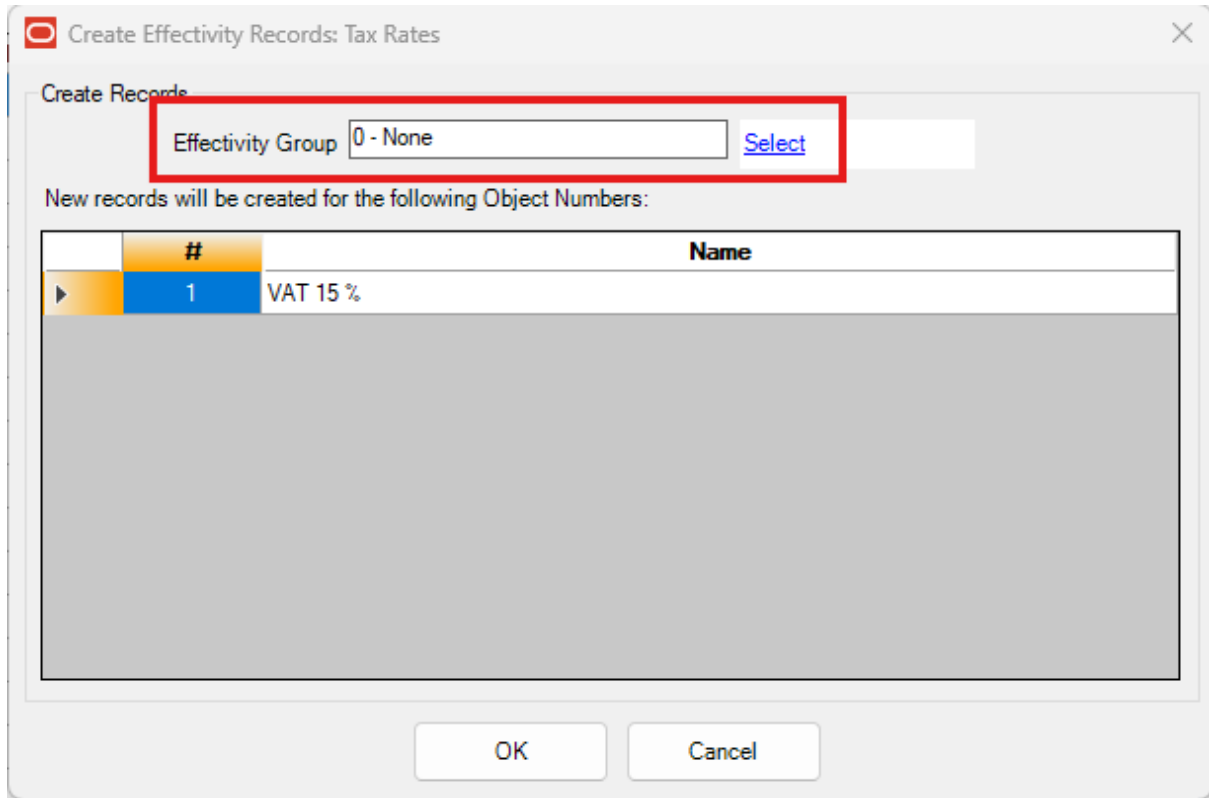
The screenshot shows the 'Tax Rates' list in the software interface. The 'Effectivity Group' column is highlighted, showing '0 - None' for all records. The table below represents the data shown in the screenshot:

#	Name	Zone/Location	Inheritance Type	Type	Start	%	Breakpoints	Report Group	Tax Label	Effectivity Group	Effectivity
1	VAT 15 %	Enterprise	Defined Here	3 - Included, Percentage	0.00	15.0000	Configure	1		0 - None	Act
2	No VAT	Enterprise	Defined Here	3 - Included, Percentage	0.00	0.0000	Configure	2		0 - None	Act
3	Tax Rate 3	Enterprise	Defined Here	0 - Disabled Tax Rate	0.00	0.0000	Configure	0		0 - None	Act
4	Tax Rate 4	Enterprise	Defined Here	0 - Disabled Tax Rate	0.00	0.0000	Configure	0		0 - None	Act

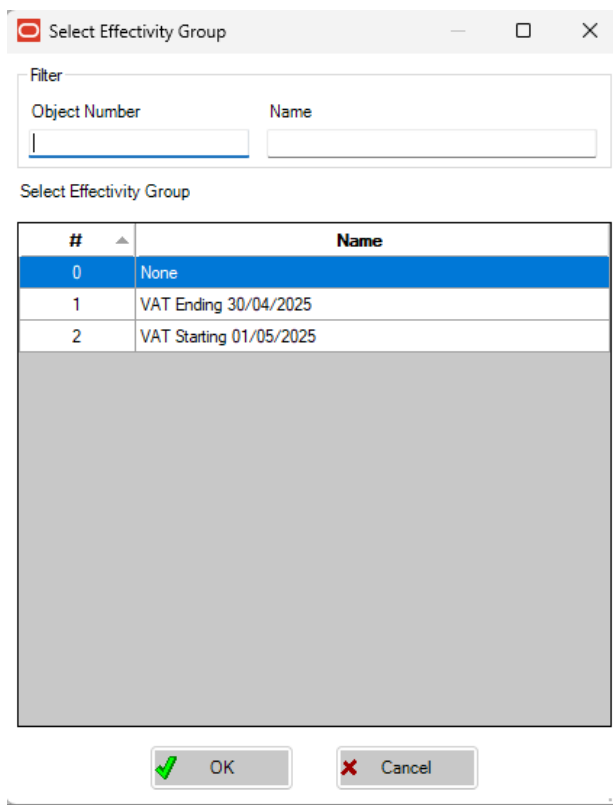
Here you will need to then apply the new effectivity records by right clicking on the Tax Rate.



Once Selected, you will be presented with the following.



Here you will now add the effectivity to end the tax rate, then select ok



You will now need to add an additional effectivity group to start the new tax rate, select #1, then scroll right to view the effectivity assignment

Apply the Effectivity Start to the "FUTURE" Record

Effectivity Group	Effectivity Status	Date Start	Date End
1 - VAT Ending 30/04/2025	Active		4/30/2025 11:59:59 PM
2 - VAT Starting 01/05/2025	Future	5/1/2025 12:00:01 AM	
0 - None	Active		

Adjust the tax rate to 15.5% on the "FUTURE" Record

#	Name	Start	%	Breakpoints	Report Group	Tax Label	Effectivity Group	Effectivity Status
1	VAT 15 %	0.00	15.0000	Configure	1		1 - VAT Ending 30/04/2025	Active
1	VAT 15 %	0.00	15.5000	Configure	1		2 - VAT Starting 01/05/2025	Future

Once assigned, the records should reflect as per below

#	Name	Start	%	Breakpoints	Report Group	Tax Label	Effectivity Group	Effectivity Status	Date Start	Date End
1	VAT 15 %	0.00	15.0000	Configure	1		1 - VAT Ending 30/04/2025	Active		4/30/2025 11:59:59 PM
1	VAT 15 %	0.00	15.5000	Configure	1		2 - VAT Starting 01/05/2025	Future	5/1/2025 12:00:01 AM	

Save all changes and VAT will now update to 15.5% as of 01/05/2025

During this process, The VAT Rate will need to be renamed to cater to Reporting and appearance on Customer Receipt or Guest Checks.

The Recommendation here is to rename as "VAT" and not "VAT 15%" or "VAT 15.5%"
This is to avoid confusion as well as future proof potential VAT Changes that may arise.

Example Below

#	Name	Inheritance Type	Type	Start	%	Breakpoints
1	VAT	Defined Here	3 - Included, Percentage	0.00	15.0000	Configure
1	VAT	Defined Here	3 - Included, Percentage	0.00	15.5000	Configure
2	No VAT	Defined Here	3 - Included, Percentage	0.00	0.0000	Configure

Please contact Micros Support if there are any issues experienced: +27 11 494 0101