Merchandise Manager 5.0.0.1002 No-Tax Promotion

Below are the steps to create a promotion where specific inventory will be non-taxable for a specified date range.

- 1) Create a No-Tax tax code.
- 2) Add that new code to the Tax Code 2 field of any items that will be included.
- 3) Create a promotion for this No-Tax feature.

Double Click the Merchandise Manager Back office Icon from the center of your desktop.



Select your company name and System Manager as the login user. Manager has special privileges. Enter a password if needed and click Log In.

•	User Sign On	-	×
	Company		-
	Bazetta Mall		
٠	CRUISE		
	Demo Company		
	Mamula's Mini Mart		
	Mamula's Mini Mart		
	User Nan	ne	
•	SYSTEM MANAGER		
	User 1		
	John Public		
	Salaat		

1) Create a No-Tax tax code.



Select Utility Menu from the Main Menu



Create a tax code 98 labeled Non-Tax Promo with a tax percent of 0.00

骎 TaxCodesType Maintenance	2			- 🗆 X
Tax Code 98	Description Non-Tax Promo	Percent	GL Number	Save Delete Clear
Tax Code	Descrip	tion	Percent	GL Number
	0 Exempt Sales		0.00	
	1 Taxable Sales		6.00	
	2 Service Fee		3.00	
•	98 Non-Tax Promo		0.00	

2) Add that new code to the Tax Code 2 field of any items that will be included. Select Inventory from the Main Menu.

,				
🖳 Main Menu			— C) ×
Files Inventory Point	t of Sale Utilities Manage	ement Dashboard		
Merchandise	e Manager		MORRIS	
Files	Activity	Reports	Utilities	
Loyalty	Inventory	Reports	Utility Menu	1
	Point of Sale			

Select Item Entry Grid from the Inventory Menu.

🖳 Inventory Menu			– 🗆 X
Merchandise	Manager	1	MORRIS
Inventory	Purchase Orders	Reports	Miscellaneous
Inventory	PO Entry	Delivery Items	Inventory v. 3.1
Product Category	View Receipt		Mix and Match v 3.1
Mix Match Codes	Inventory Receipts		Dept Setup
Departments			Scanner / Import
Vendors			
Item Entry Grid			
Promotions			

Add Tax Code 2 as a column on the screen:

•	Item Entry	Grid											-		×	
	ltem_No		Description		PCat	PCat Desc	List	Cost	Mix	OnHand	Taxable	InActive	Delete		Deptid	
	Contains:	♀ Contains:		7	Con 🌱	Cont 💡	Equ 🖓	Eq Ÿ	Equals: 🛛 🖓	Equals: 🛛 🖓	🔲 Ÿ	🔲 🍸		Equ	als:	?
Des	scription					Max:	500		Scar	n ite	m:			Pr	ice Only	1
0 R	ecords		Dept:		~	Ref	resh	D	elete C	àlobal Chang	e ~	Up	date Add	lltem	Exit	

Select Setup and check the option for Tax Code 2. Save the setup.



You should see Tax 2 as the last column.

•	Item Entry	/ Gr	id																		-			×	
	ltem_No			Description	n	PC	at	PCat Desc	List	:	Cost		Mix		OnHan	d	Taxable	InActiv	/e	De	lete	Deptid		Tax 2	2
	Contains:	7	Contain	5:	9	Co	7	Cont 🍸	Equ	7	Eq 🝸	Equ	uals: S	7	Equals:	7			7			Equals:	7	Eq 5	2

Call any inventory up on the grid and change the Tax Code 2 field to 98. This example will call all inventory with a product category MISC to the screen.

🖳 Item Entry G	rid									—		×	
Item_No	Description	PCat	PCat Desc	List	Cost	Mix	OnHand	Taxable	InActive	Delete	Deptid	Tax 2	-
Contains: 💡	Contains: 🛛	Co 🖓	Con 🖓	Eq 🖓	E 🖓	Equals: 🛛 🖓	Equals: 🛛 🖓	E 7	E 7		Equals: 🛛 🖓	Eq 🍸	
019200753524	Lysol Lemon Breeze Scented All	1300	MISC	2.99	0.00	0	-2				0	0	
019800701956	WindexÂ⊕ Glass Cleaner Origi	1300	MISC	2.99	0.00	0	0	v			0	0	
020066009991	Rust-Oleum Striping Paint 20 oz	1300	MISC	12.99	0.00	0	0	v			0	0	
020892013650	Winchester Super-X Magnum B	1300	MISC	20.99	0.00	0	2	v			0	0	
026509010807	Allen Tactical Engage Tactical Rif	1300	MISC	34.99	0.00	0	-1	v			0	0	
029465002046	Federal Premium Game-Shok U	1300	MISC	15.99	0.00	0	10	v			0	0	
029465056919	federal Irg mag pistol match	1300	MISC	15.99	0.00	0	12	v			0	0	
032877675005	flush kit m6x.75	1300	MISC	5.99	0.00	0	1	v			0	0	
034337031376	Pachmayr Grip, Presentation, Fit	1300	MISC	39.99	27.76	0	-1	v			0	0	-
040589023533	Traditions Peep Sight Fiber Opti	1300	MISC	39.99	0.00	0	-1	v			0	0	
041789001215	hood sweatshirt	1300	MISC	25.00	0.00	0	-9				0	0	
047495800203	Nature's Bakery Apple Crumble	1300	MISC	2.99	0.00	0	0	v			0	0	
078742221960	Great Value Glass Cleaner 32 Fl	1300	MISC	1.99	0.00	0	0	v			0	0	
096619879045	blue cleaner	1300	MISC	5.99	0.00	0	-21	v			0	0	
548432150080	small pan charger mi008	1300	MISC	10.99	0.00	0	33	v			0	0	
611613002468	Ksa Crickett Stationary Mount B	1300	MISC	19.99	0.00	0	9	v			0	0	
640832008265	keltec p-17 mag	1300	MISC	19.99	0.00	0	2	v			0	0	
645397938040	NEBO Mycro 400 Lumen LED BI	1300	MISC	24.99	0.00	0	7	v			0	0	
722252161093	WHITE CHOCOLATE MACADAM	1300	MISC	1.39	0.00	0	0	v			0	0	-
722252194985	Chert flint	1300	MISC	3.50	0.00	0	25	v			0	0	
748927962741	swiss bp	1300	MISC	42.99	0.00	0	-19	v			0	0	
762344705101	Fiocchi Shooting Dynamics Han	1300	MISC	29.99	0.00	0	0	v			0	0	
793676090306	Gamo Combo Pack .22 Cal Hunt	1300	MISC	20.99	0.00	0	1	v			0	0	7
Description				Max: 50	0		Scan				Pr	ice Only	,
Item No:	P/C MISC		~		_	Data	Globel	Item:					
Count: 27	Dept:		~ F	Refres	n	Setup	TaxCode	2 V	0	Update	Add Item	Exit	
									7				111

There are 27 items displayed. Under Global Change, select TaxCode2 in the drop down and enter 98 in the box.

7623447051	01 Fiocchi Shooting Dynamics Han	1300 MIS	29.99	0.00	0 0		v			0	0	
7936760903	06 Gamo Combo Pack .22 Cal Hunt	1300 MIS	20.99	0.00	0 1		v		ſ	0	0	~
Description			Max: 5	500] S	can	tem:				rice Only	У
Item No:	P/C MISC	~	Dofroe	h	Delete	Global C	hange					
	Dept:	~	Reffes		Setup	TaxCode	2 ~	98	Update	Add Item	Exit	
Count: 27					octop			?				

Select Update. Answer Yes to the question.

ltem_No	Description	PCat	PCat Desc	List	Cost	Mix	OnHand	Taxable	InActive	Delete	Deptid	Tax 3
Contains: 🛛 🖓	Contains: Y	Co 🤋	Con 💡	Eq 💡	E 7	Equals: 💡	Equals: 💡		9		Equals: 9	Eq
019200753524	Lysol Lemon Breeze Scented All	1300	MISC	2.99	0.00	0	-2				0	98
019800701956	WindexÁ⊕ Glass Cleaner Origi	1300	MISC	2.99	0.00	0	0	V			0	98
020066009991	Rust-Oleum Striping Paint 20 oz	1300	MISC	12.99	0.00	0	0	V			0	98
020892013650	Winchester Super-X Magnum B	1300	MISC	20.99	0.00	0	2	V			0	98
026509010807	Allen Tactical Engage Tactical Rif	1300	MISC	34.99	0.00	0	-1				0	98
029465002046	Federal Premium Game-Shok U	1300	MISC	15.99	0.00	0	10	V			0	98
029465056919	federal Irg mag pistol match	1300	MISC	15.99	0.00	0	12				0	98
032877675005	flush kit m6x.75	1300	MISC	5.99	0.00	0	1				0	98
034337031376	Pachmayr Grip, Presentation, Fit	1300	MISC	39.99	27.76	0	-1				0	98
040589023533	Traditions Peep Sight Fiber Opti	1300	MISC	39.99	0.00	0	-1	V			0	98
41789001215	hood sweatshirt	1300	MISC	25.00	0.00	0	-9				0	98
47495800203	Nature's Bakery Apple Crumble	1300	MISC	2.99	0.00	0	0	V			0	98
078742221960	Great Value Glass Cleaner 32 Fl	1300	MISC	1.99	0.00	0	0				0	98
096619879045	blue cleaner	1300	MISC	5.99	More	hManager	2020	~			0	98
548432150080	small pan charger mi008	1300	MISC	10.99	WIELC	invianagei	2020				0	98
611613002468	Ksa Crickett Stationary Mount B	1300	MISC	19.99	1						0	98
640832008265	keltec p-17 mag	1300	MISC	19.99	27 re	cords were	e updated.				0	98
645397938040	NEBO Mycro 400 Lumen LED BI	1300	MISC	24.99							0	98
722252161093	WHITE CHOCOLATE MACADAM	1300	MISC	1.39				-			0	98
722252194985	Chert flint	1300	MISC	3.50			OK				0	98
748927962741	swiss bp	1300	MISC	42.99	0.00	0	-19	~			0	98
762344705101	Fiocchi Shooting Dynamics Han	1300	MISC	29.99	0.00	0	0				0	98
793676090306	Gamo Combo Pack .22 Cal Hunt	1300	MISC	20.99	0.00	0	1		I I		0	98
ription				Max: 5	00]	Scan				P	rice (
No:	P/C MISC		~			Delete	Global	Item: Change				
	Dent			Refres	h	Delete	-		1			-

Repeat these steps until all inventory that will be non-taxable have 98 in the TaxCode2 field.

3) Create a promotion for this No-Tax feature.

Select Inventory from the Main Menu

🖳 Ma	in Menu							—		×
Files	Inventory	Point of Sale	Utilities	Managem	ent Dashboard	d				
N	lerchan	idise Mar	nager				MOR	RIS		
Files	Loyalty		tivity Inver Point c	ntory of Sale	Reports	Reports		ties Utility	Menu	

Select Promotions from the Inventory Menu

🖳 Inventory Menu			- 🗆 X
Merchandise	Manager		MORRIS
Inventory	Purchase Orders	Reports	Miscellaneous
Inventory	PO Entry	Delivery Items	Inventory v. 3.1
Product Category	View Receipt		Mix and Match v 3.1
Mix Match Codes	Inventory Receipts		Dept Setup
Departments			Scanner / Import
Vendors			
Item Entry Grid			
Promotions			

This example will create a tax free promotion from 8/1/2024 thru 8/31/2024. Select Tax Promo from the Promotion Type drop down.

Promotion Type	Start 0 6/22	Date 2/2024		End 6/	d Date /22/2024	Sale / Percent / Ta	ax Free		Save
Item Number Product Category									Delete
MixMatch Code									Cicui
Buy Down Tax Promo									Cicu
Buy Down Tax Promo Description	Promotion Typ	pe	ltem No		Category	MixMatchCode	Start D	Date	End Date
Description	Promotion Typ	pe Y Co	Item No	7	Category Contains:	MixMatchCode	Start D	Date	End Date

Enter the date ranges for the promotion. Select Tax Free TaxCode2=98 from the Sale/Percent/Tax Free drop down. Enter a description of the promotion. NOTE: This description will be printed on the receipt. Select Save.

Promotion Type	Sta	art Date		End	Date	Sale / Percent / Tax	Free		-	
Tax Promo ~		3/ 1/2024		8/	/31/2024	-	~		Save	e
Description						Sale Price			Delet	te
August Tax Free Pr	omotion					Percent Off	.00		Class	
						Tax nee Taxcode2=	-00		Clea	ar
Description	Promotion	n Type	tem No		Category	MicMatchCode	Start I	Date	End Dat	ar Je
Description ntains: 9	Promotion 2 Equals:	n Type Y	Item No Contains:	9	Category Contains: ¶	MisMatchCode	Start I	Date Y	End Dat Equals:	ar Xe

When any items with a 98 in taxcode2 are sold during the promotion date range, the items will be marked non taxable and the promo will be added to the detail.

🛃 User: System Man Drawer: 1 Customer: Cash Sale Balance: \$0.00 🗕									– 🗆 ×			
Sales man	View Sales Gift	Cards	Inventor		redit Carc	s		Over	ride		3349	1anagement
Item No	Description				Save		Delete		Misc Non- Taxable	Misc Taxable	Fruit	Bags of Candy
Otv	Price	Disc %			Void		Cancel		Incense	Cup of Ice	Slushie	Tshirt
Item No	Descript	ion	Qty	Price	Disc	UM	Amount		moonee	oup of loo	Chaorino	
032877675005 PROMO5	flush kit m6x.75 Special: August Tax	Free Prom	1 1	5.99 0.00	0.00 0.00		5.99 0.00		Save Sale	Retrieve Sale		DISCOUNT
									PROPANE	Pop Drawer	DISCOUNT	Line Discount 10
									Reset		Age Check	Back to Main
ltems: 2	Subtotal \$5.99	Tax \$0.00		Dis \$0.00	count)	\$	Total 5.99			Price L	.ookup	
Receipt	Past Receipt Sale	Total		Paid			Change		Complet	te Ca	ancel	Customer

The receipt will show the promotion.

	×
	- E
	~
Exit	
	Exit