



GST/HST REBATE GUIDE

DECEMBER 15, 2024- FEBRUARY 15, 2025

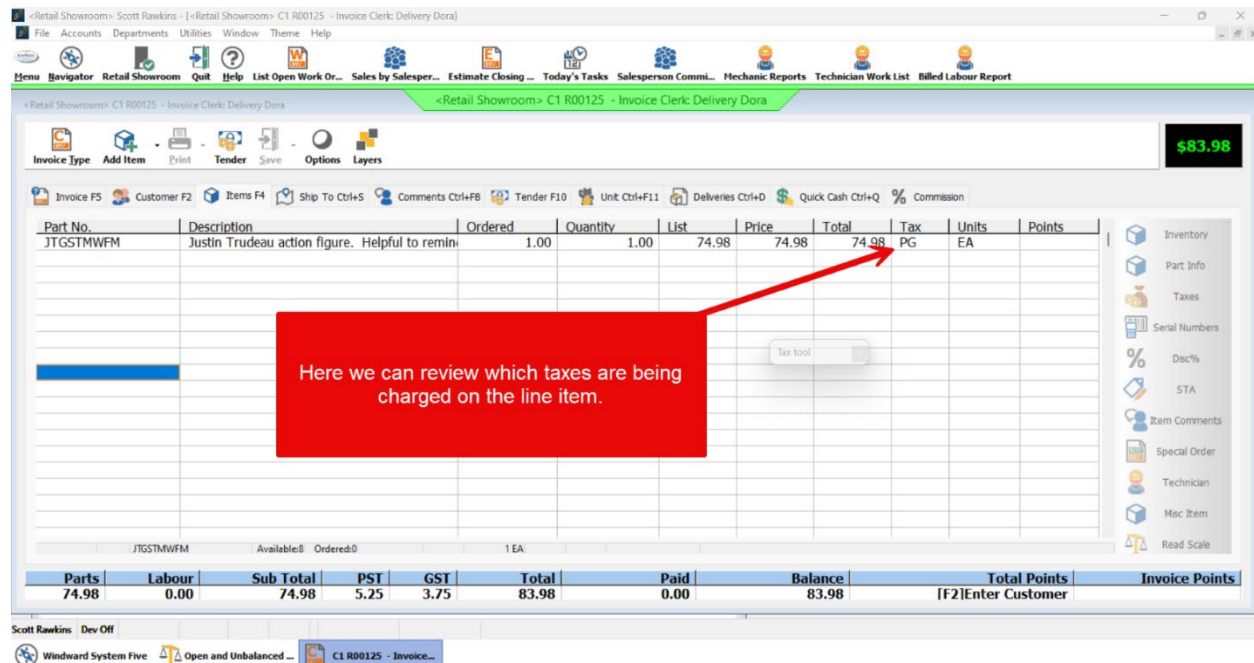


GST/HST Rebates Dec 15th-Feb 15th,2024

This short manual is designed to assist you and your staff in managing the 2024 GST/HST Rebate on certain products released by the Government of Canada. We will review how to toggle the tax settings in 3 ways. On the line of the invoice at Point of Sale, on and Inventory Item and on a group of Inventory Items.

Tax Settings on an Invoice Line

Let us consider the following Sale.



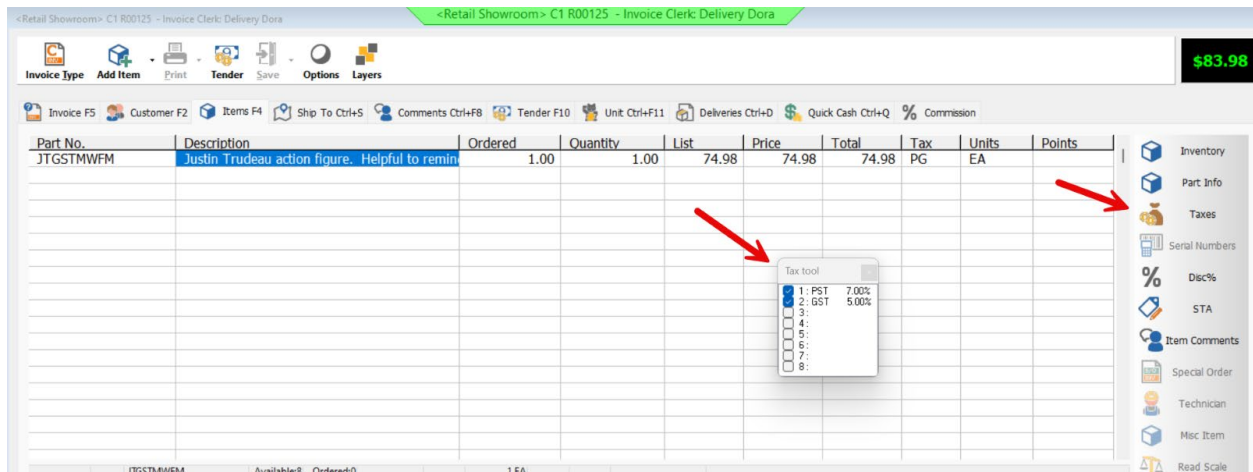
The screenshot shows the Windward Software Point of Sale interface. The main window displays an invoice for 'Justin Trudeau action figure. Helpful to remind'. The 'Tax' column shows 'PG' (Provincial Goods Tax) and 'EA' (Federal Excise Tax). A red callout box with the text 'Here we can review which taxes are being charged on the line item.' points to the 'Tax' column. The bottom of the screen shows a summary table with columns: Parts, Labour, Sub Total, PST, GST, Total, Paid, Balance, Total Points, and Invoice Points. The values are: Parts 74.98, Labour 0.00, Sub Total 74.98, PST 5.25, GST 3.75, Total 83.98, Paid 0.00, Balance 83.98, Total Points [F2]Enter Customer, and Invoice Points.

Part No.	Description	Ordered	Quantity	List	Price	Total	Tax	Units	Points
JTGSTMWFM	Justin Trudeau action figure. Helpful to remind	1.00	1.00	74.98	74.98	74.98	PG EA		

Parts	Labour	Sub Total	PST	GST	Total	Paid	Balance	Total Points	Invoice Points
74.98	0.00	74.98	5.25	3.75	83.98	0.00	83.98	[F2]Enter Customer	

You can see on the line item that the Taxes are enabled for PST and GST.

By highlighting the line item and selecting the TAXES button on the right hand side you can toggle the taxes on this line item.

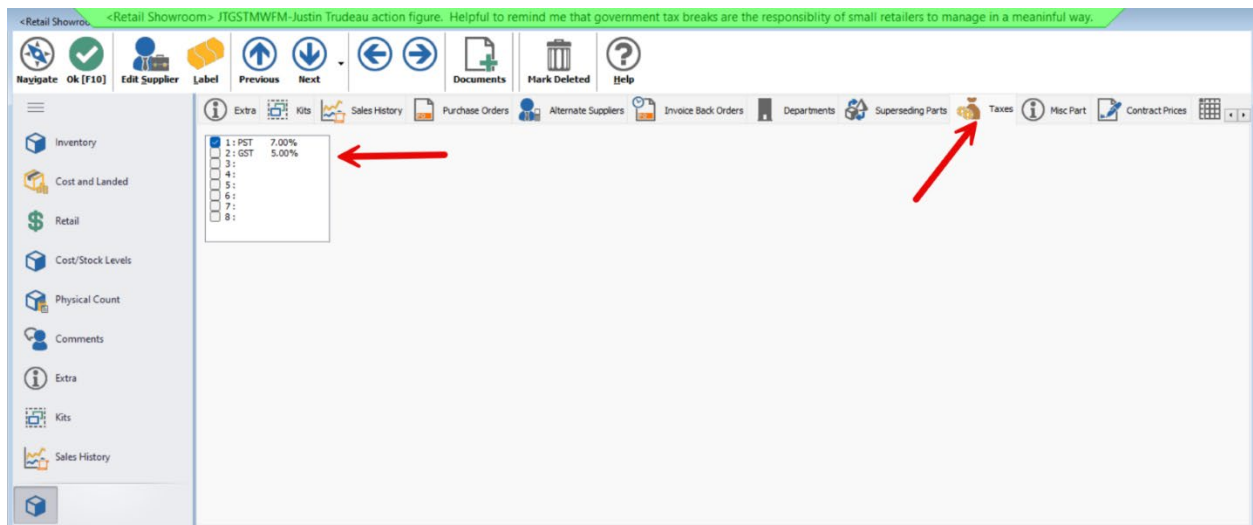


This will allow you to check and uncheck which taxes you charge on this line. Though this would cause a lot of potential for user error it may be the best approach for you if:

- You have a mixture of products that the policy affects and want to leave their permanent tax settings unchanged.
- You don't want to take on the work of using a more thorough method, we will list these more thorough methods below.

Tax Settings on an Item

In every inventory item you can make a permanent change to the taxes charged on that item in the items tax settings.





NOTE: you will need to scroll over to the right on the tabs to find the Taxes area.

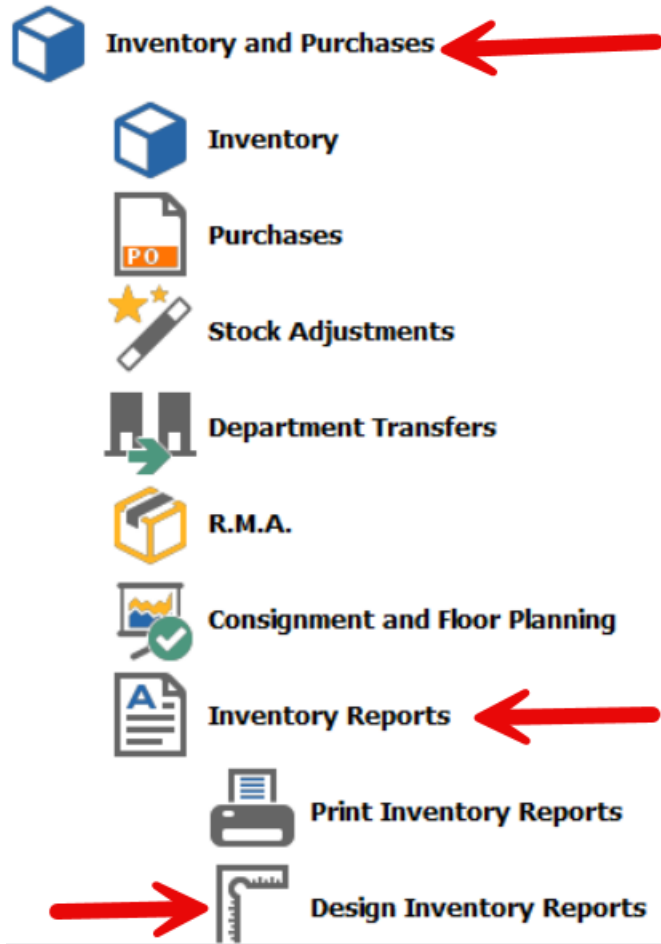
Choosing this approach is appropriate if:

- You have a small number of products the rebate applies to and can manage the work of performing these steps on December 14th and February 16th to ensure that these settings are adjusted to be suitable during those times.
- You do not want your staff to have to remember to handle the rebate at the point of sale.
- You do not feel comfortable using a mass edit of the taxes or are unable to manage that as the products in question are not in one category, don't share a supplier or brand.

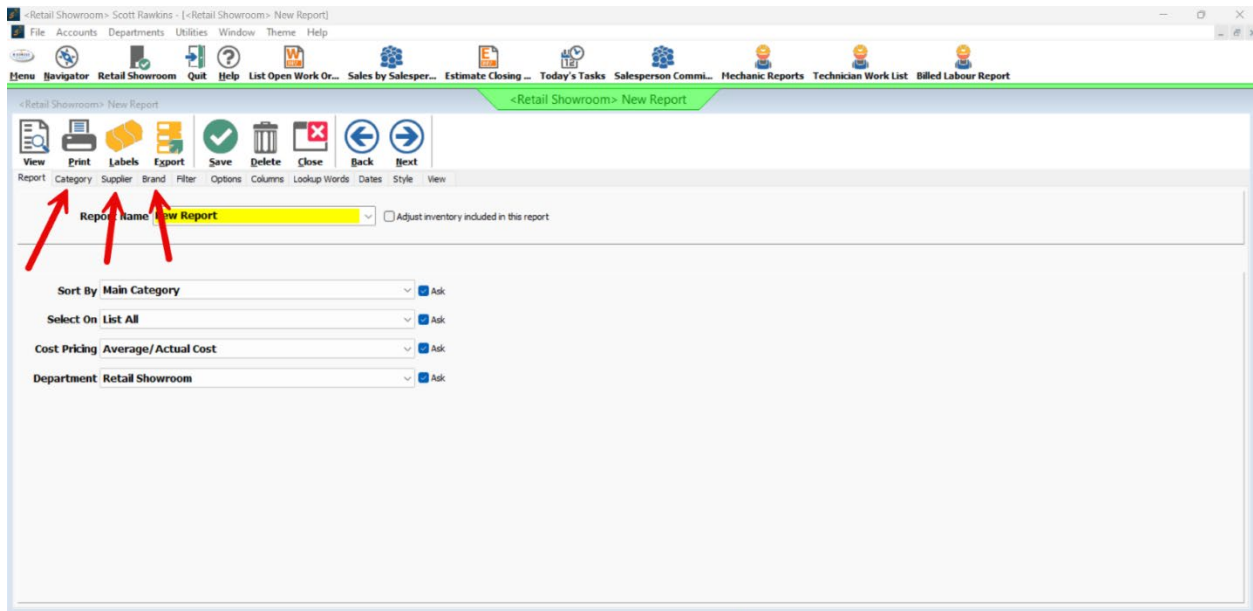
Tax Settings on a Category, Supplier or Brand

If the product that the rebate applies to is in one category, has a similar vendor or brand or another similar searching tool such then the DESIGN INVENTORY REPORT can be used to toggle the taxes on or off on many items at one time. NOTE: this approach changes the tax settings on many products at once, it is important to be careful not to change items the rebate does not apply to.

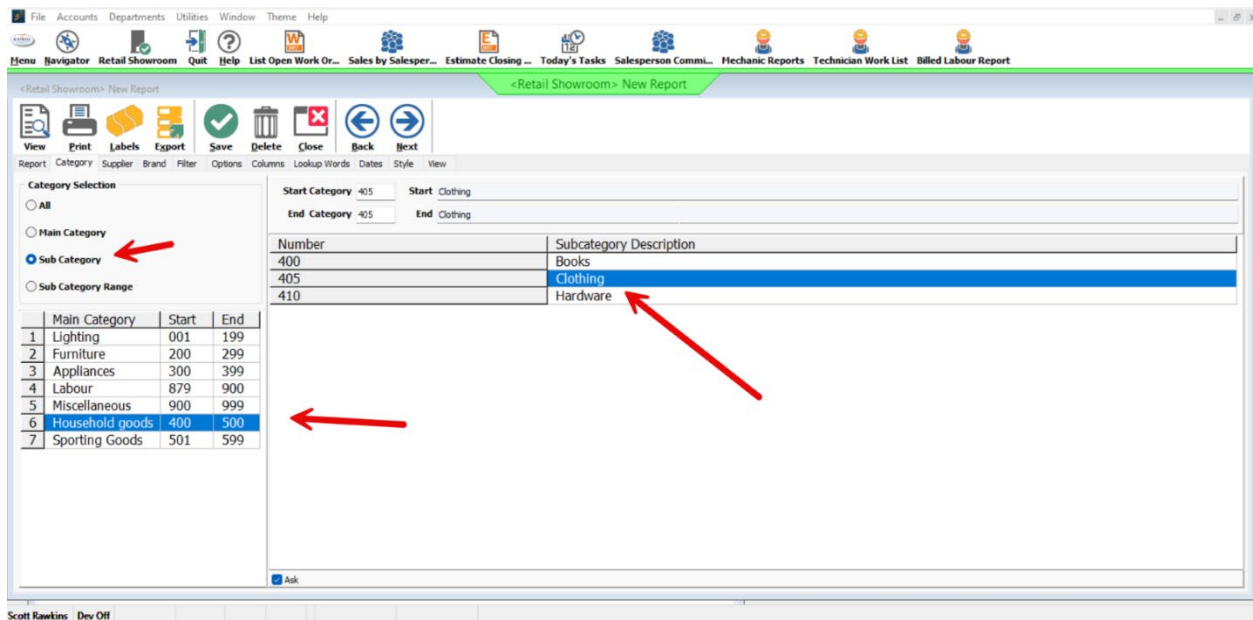
Navigate to:



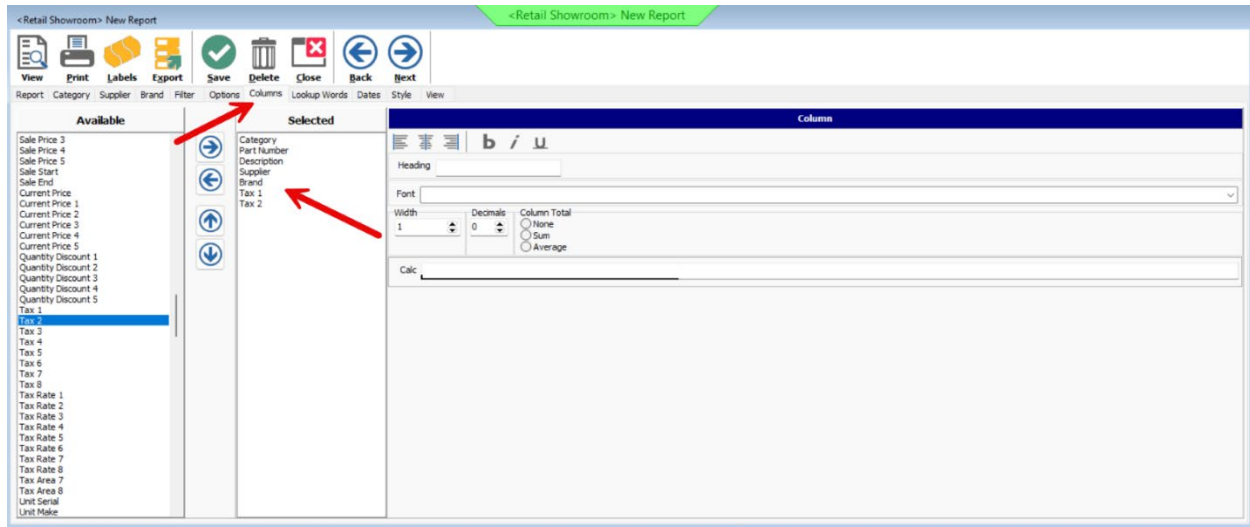
This report allows you to do many, many things. One of these things is toggle the taxes on the items that are on the report. The first step is to use a filter to ensure only the correct items are on the report. This may not be feasible if the items the rebate affects are in a variety of categories for example. First, lets create a filter.



Choose a filtering method from one of the above. In this example I will use the sub category filter as follows.



Then I will select some columns for the report under the columns tab. Select columns which provide the information you need to review to ensure you are affecting the correct products.



View

Next click the **View** button on the top left. Review the products on this list as they are the products that will be affected by the change. Note: there is no way to remove individual items on this list but you can double click the items on the list and use approach #2 on them.

<Retail Showroom> New Report

Report Category Supplier Brand Filter Options Columns Lookup Words Dates Style View

New Report

Cat	Part Number	Description	Supplier	Brand	Tax 1	Tax 2
405	LEVI50126black26	Classic Fit Levi 501 good to make you fit in in the 90's			Y	Y
405	LEVI50126black28	Classic Fit Levi 501 good to make you fit in in the 90's			Y	Y
405	LEVI50126black30	Classic Fit Levi 501 good to make you fit in in the 90's			Y	Y
405	LEVI50126black32	Classic Fit Levi 501 good to make you fit in in the 90's			Y	Y
405	LEVI50126black36	Classic Fit Levi 501 good to make you fit in in the 90's			Y	Y
405	LEVI50126black38	Classic Fit Levi 501 good to make you fit in in the 90's			Y	Y
405	LEVI50126black40	Classic Fit Levi 501 good to make you fit in in the 90's			Y	Y
405	LEVI50126blue26	Classic Fit Levi 501 good to make you fit in in the 90's			Y	Y
405	LEVI50126blue28	Classic Fit Levi 501 good to make you fit in in the 90's			Y	Y
405	LEVI50126blue30	Classic Fit Levi 501 good to make you fit in in the 90's			Y	Y
405	LEVI50126blue32	Classic Fit Levi 501 good to make you fit in in the 90's			Y	Y
405	LEVI50126blue36	Classic Fit Levi 501 good to make you fit in in the 90's			Y	Y
405	LEVI50126blue38	Classic Fit Levi 501 good to make you fit in in the 90's			Y	Y
405	LEVI50126blue40	Classic Fit Levi 501 good to make you fit in in the 90's			Y	Y
405	LEVI50126red26	Classic Fit Levi 501 good to make you fit in in the 90's			Y	Y
405	LEVI50126red28	Classic Fit Levi 501 good to make you fit in in the 90's			Y	Y
405	LEVI50126red30	Classic Fit Levi 501 good to make you fit in in the 90's			Y	Y
405	LEVI50126red32	Classic Fit Levi 501 good to make you fit in in the 90's			Y	Y
405	LEVI50126red36	Classic Fit Levi 501 good to make you fit in in the 90's			Y	Y
405	LEVI50126red38	Classic Fit Levi 501 good to make you fit in in the 90's			Y	Y

Now that I have selected the items I wish to adjust the tax settings on, and reviewed that the correct items are on this list, it is time to make the changes. To do this return to the tab of the report named report.

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Choose the tick box indicated below.

You can now select and un-select the taxes you wish to toggle.

Then click the OK button. The system will ask you if you wish to affect the master default item. In this case I would suggest choosing NO.



Once this is done hit the **View** again.

The System will ask you to confirm that you are affecting ALL of the items on the report. Make certain that the previous steps are handled properly then click YES.

The System then quickly adjusts the taxes on the line items as it rebuilds the report. NOTE: The first time it does this the report builds as it does the work so the list may not show the



tax change though it already happened. Click **View** again to see the changes.

The report now demonstrates the items where the taxes have been affected. Once the rebate dates have passed you simply reverse this using the same steps.