Instructions making Restaurant items Non-GST/HST taxable for Tax Holiday offered By the Federal Government

These instructions will guide you in removing GST/HST from your items during the Tax Holiday.

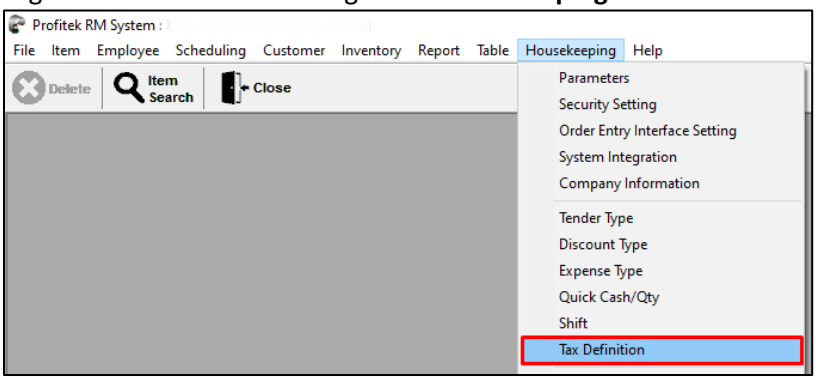
***** NOTE:**

1. Please refer to the government website regarding the types of items that qualify for the tax break : https://www.canada.ca/en/services/taxes/child-and-family-benefits/gst-hst-holiday-tax-break.html
2. **Steps (8 to 11)** only applies to stores that include GST/HST tax in the retail price.
3. Keep track of what you had changed so that you can revert it on Feb 16, 2025
4. After completing your changes, make sure to relaunch the Order Entry program to apply the updates. If you have Online Order and Deliverect Integration you must publish the changes to your Online and Deliverect as well. Refer on **steps 5 and 6**.

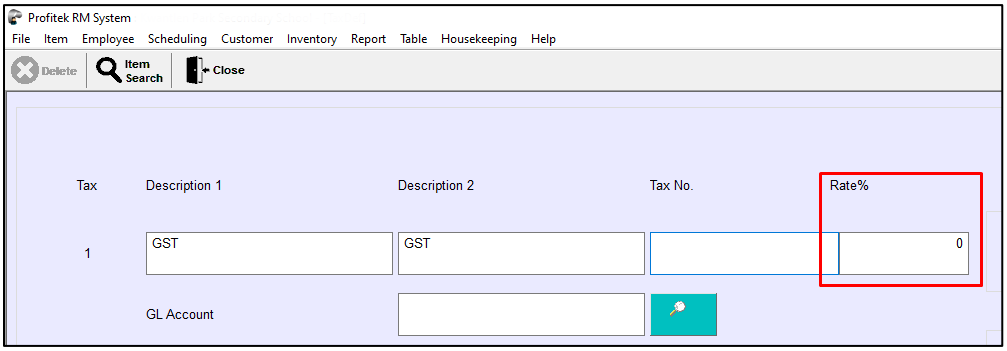
The tax configuration in the restaurant software is determined by the settings in the subcategory. Individual items do not have tax flags; only subcategories have them. If you disable the GST/HST for a subcategory, all items within that subcategory will become non-taxable. To ensure certain items remain taxable, you must move them to a different subcategory where taxes are enabled.

- **If all your items qualify for the GST/HST tax break,** follow these steps **(A to C).**
  Important Note: After completing **steps A to C**, if you have items that includes GST/HST tax in the retail price you must complete **steps (8 to 11) below**.

A. Login to Back Office and navigate to **Housekeeping > Tax Definition.**



B. Set GST/HST Tax rate **from 5% to 0%. For Ontario, set both HST and Rebate Rate to 0%**

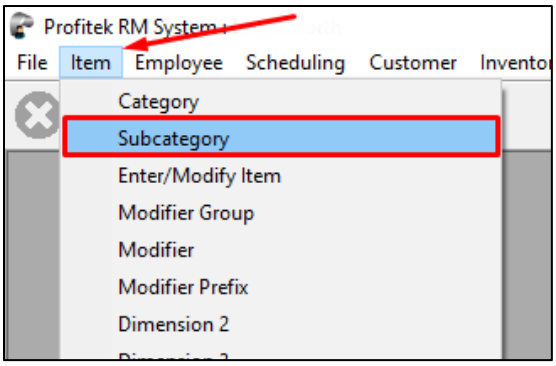


C. Done!

- **If not all your items qualify for the GST/HST Tax break, follow the steps below.**

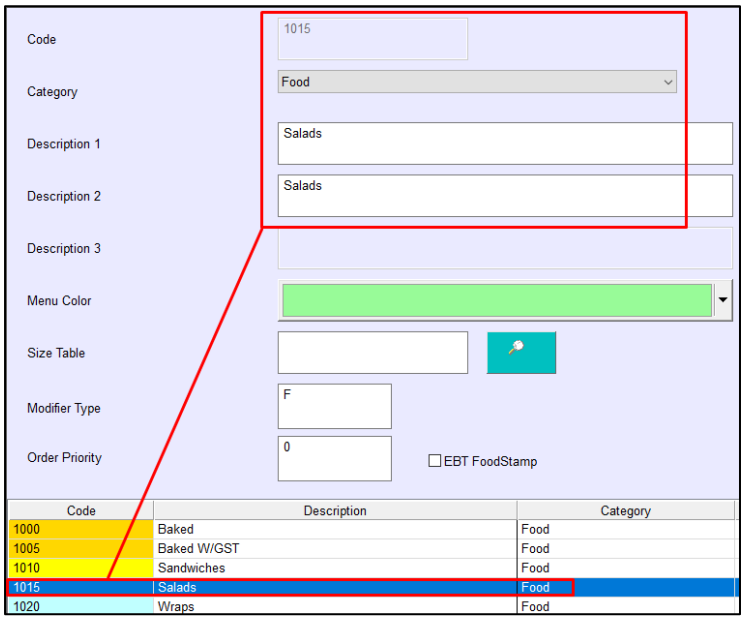
To remove GST/HST tax from the Subcategory, follow these **steps (1 to 7)** to complete the process.

1. Login to Back Office and navigate to **Item > Subcategory.**

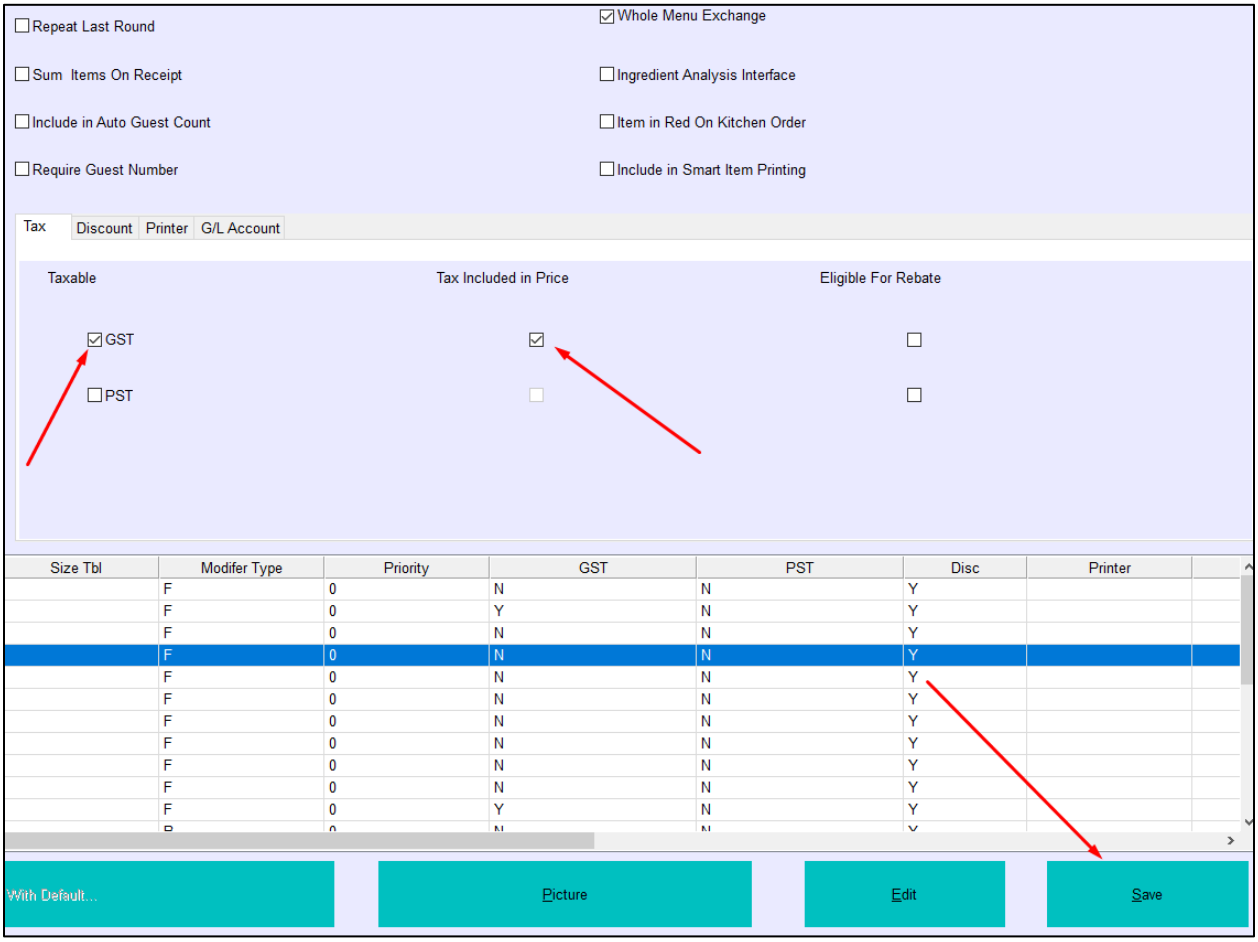


2. Select the Subcategory that qualifies GST/HST Tax break.

2.1. Double click on the subcategory, in the example below. Salad subcategory is selected.



4.2. Uncheck the GST checkbox and then click **"Save"** button to apply the changes.



NOTE: If your subcategory is set to **"Tax Included in Price,"** as seen on the image above. The checkbox will automatically be unchecked once you disable the GST checkbox. You will need to complete all steps, including **steps (5 to 11)** below.

3. Repeat **steps from 1 to 2** for the rest of the subcategories that qualifies GST/HST tax break.
4. Relaunch Order Entry for the changes to take effect.
5. **For OLO Users.** Under OLOClient, do Reupload so that changes will be updated to Online Order.
6. **For Deliverect Users.** Log in to the **Deliverect portal**, perform a product synchronization, and publish the updated menu to apply changes.
7. Done.

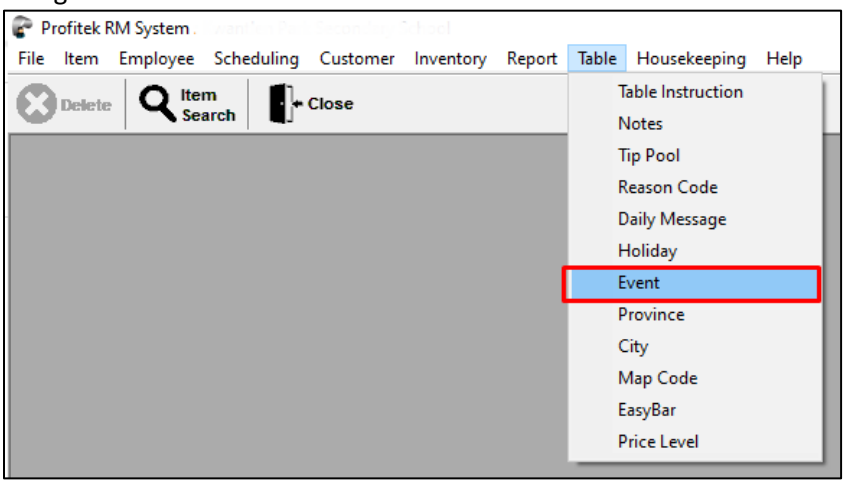
*** Only follow next steps if your items have GST/HST included in the retail price ***

Tax included in Price Instructions

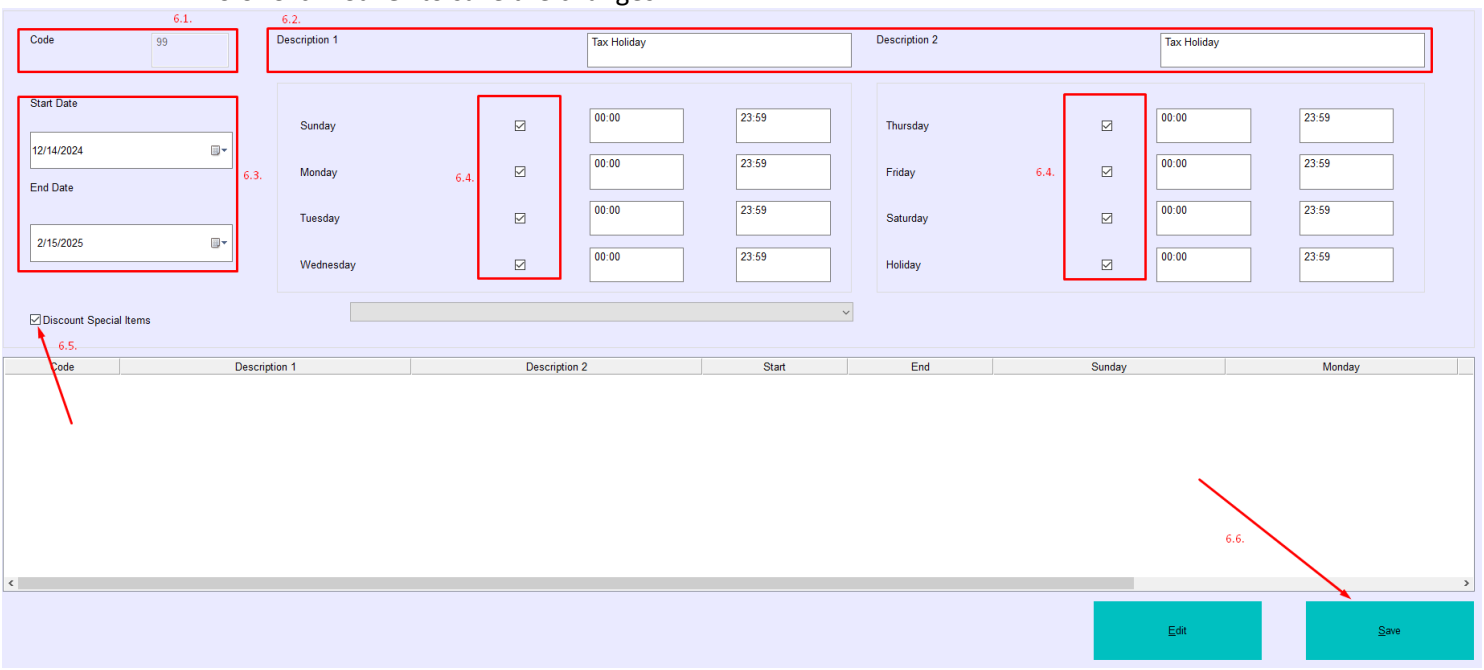
To remove the GST/HST value from your retail price, create an event that applies a **4.80%** discount to your selected items or subcategories. For BC with Liquor Tax, the discount rate should be 4.30%.

To achieve this, you will need to create a new event scheduled to run from **December 14, 2024** to **February 15, 2025.**

8. Navigate to **Table > Event**.



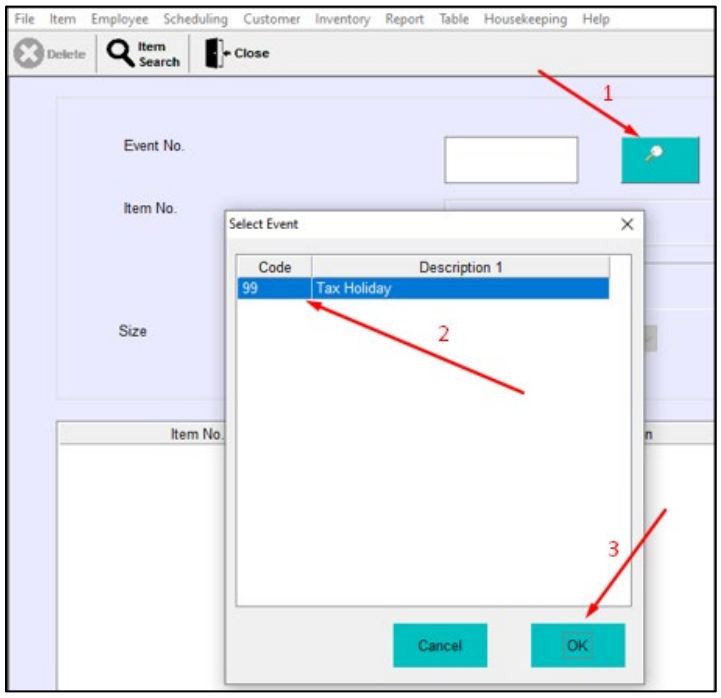
9. Create an Event.
   - **6.1.** Create a unique Code.
   - **6.2.** Enter **"Tax Holiday"** for the description.
   - **6.3.** Set **Start Date to 12/14/2024** and **End Date to 02/15/2025.**
   - **6.4.** Check all the day checkboxes, and the start and end times will be automatically generated.
   - **6.5.** Check Discount Special Items.
   - **6.6.** Click **"Save"** to save the changes.



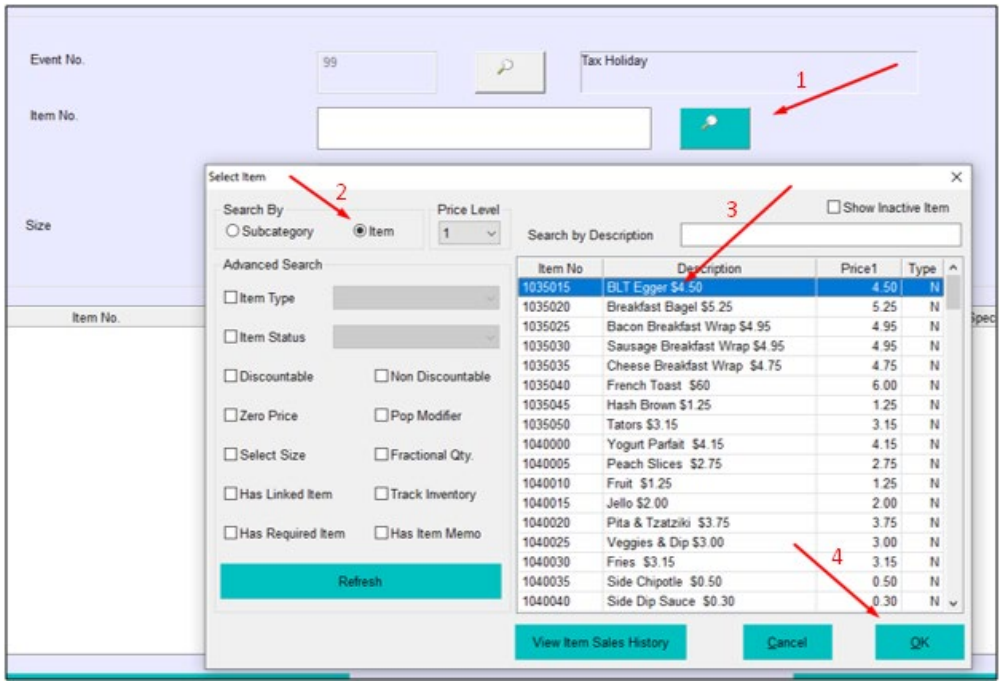
10. After creating the event, you will now set a special price for your items or subcategories to apply the **4.80%** discount. Navigate to **Item > Special Item by Event**. You can apply the discount either by item number or by subcategory.

- **<u>Discount by Item:</u>**

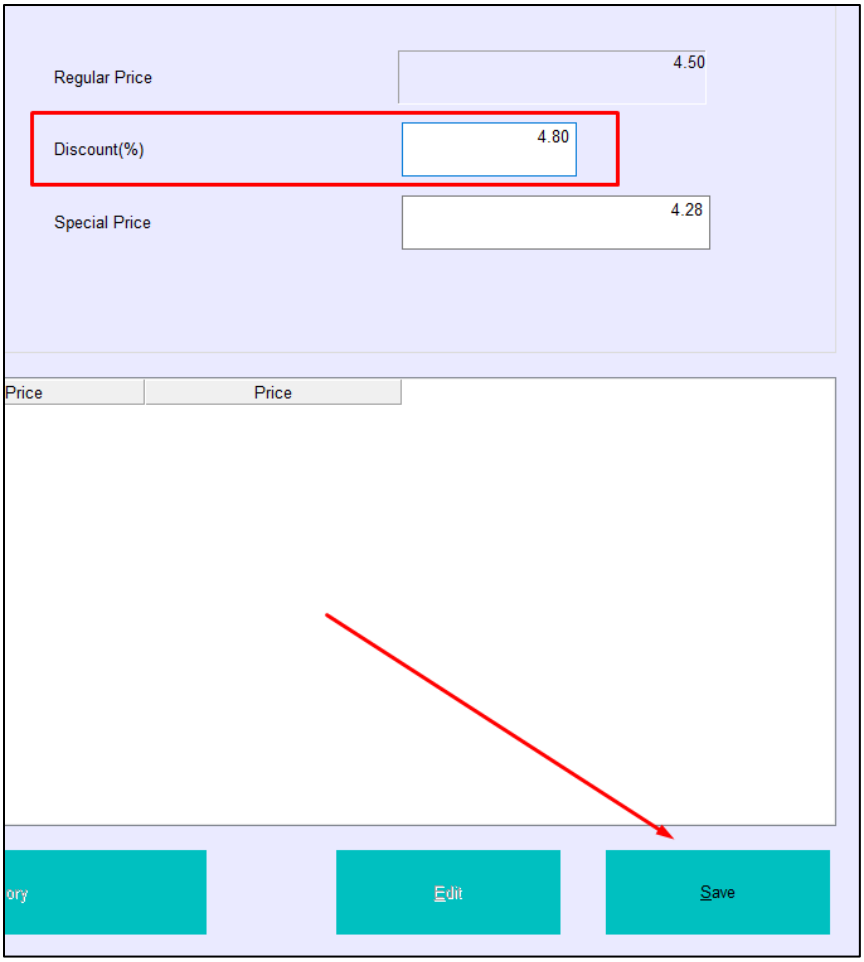
A. Click on the Event No. search button and select the event “Tax Holiday” and then click Ok.



B. Click on the Item No. search button and select the item and then click ok.



C. On the right side of the screen set the Discount% to 4.80 and then click Save.

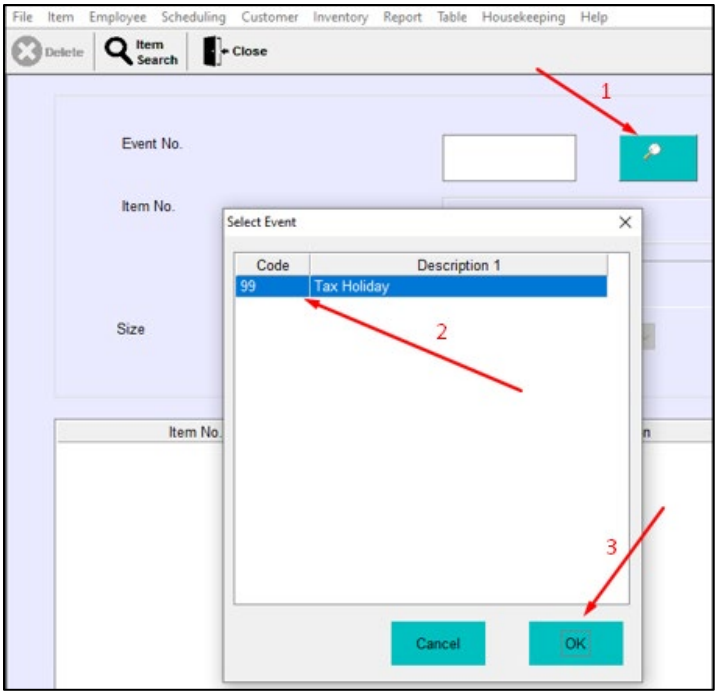


D. Repeat the process from **Step B and C** for the rest of the items that you want add the discount.

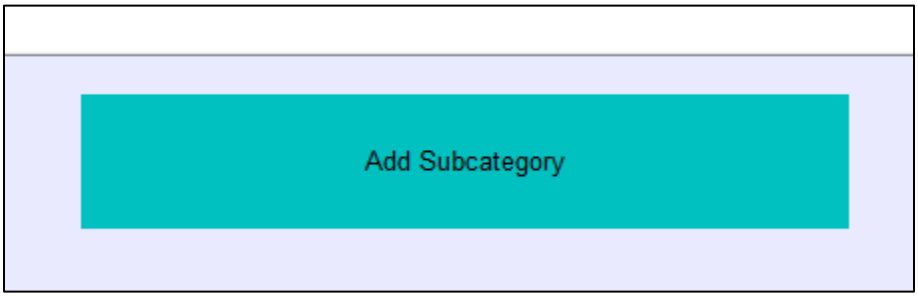
E. Done.

- **<u>Discount by Subcategory:</u>**

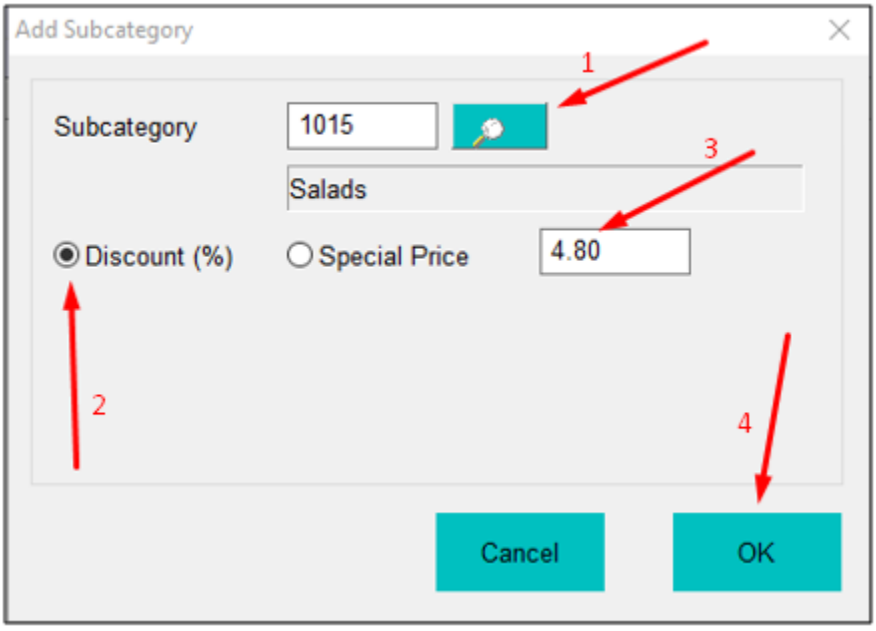
A. Click on the Event No. search button and select the event “Tax Holiday” and then click Ok.



B. On the lower middle part of the screen click on “Add Subcategory”



C. Click the search icon to browse for a subcategory. Click on the Discount Radio Button and set the discount % to 4.80 and then click ok to save the changes.



D. Repeat the process from **Step B and C** for the rest of subcategories that you want add the discount.

E. Done.

11. Done.