

DynamicZip

DynamicZip Sales Tax Software creates and maintains your tax setup records for USA and Canadian sales and use taxes. DynamicZip also provides automatic entry of city and state based on the ZIP Code, automatic selection of the tax schedule ID based on the ship-to address, as well as a multitude of utilities to facilitate the management of sales and use taxes for Microsoft Dynamics™ GP (formerly Great Plains). DynamicZip also provides a variety of detail and summary tax reports extracted from the transaction history retained in Microsoft Dynamics™ GP Receivables, Payables, RM Invoicing, and Sales Order Processing modules.



DynamicZip is available in the following configurations:

- ☞ DynamicZip (*Requires ZIPsales Database*) - Our full module that allows for the import of the ZIPsales Database from CCH, and includes the functionality of our Purchase Tax Accrual & Reporting Module that is available for purchase separately.
- ☞ DynamicZip with the ZIP+4 Option (SQL only, requires ZIPsales Database and ZIPsales [ZIP+4](#)) - Zip+4 is an add on module to DynamicZip that allows the user to positively identify the ship to county when a particular ZIP Code crosses county lines.
- ☞ Purchase Tax Accrual & Reporting - This module is for use/purchase tax but does not include the database import functionality feature of the full module.

Target Customer Profile

Any business using Microsoft Dynamics™ GP that is burdened with sales tax setup, maintenance, and reporting difficulties.

Other Products Required to Implement DynamicZip

Besides [Microsoft](#) Dynamics GP, the ZIPsales™ Database is required as the source of sales and use tax setup data. DynamicZip Sales Tax Software imports the ZIPsales Database into Microsoft Dynamics GP; this import process creates and/or updates the Microsoft Dynamics GP tax details and schedules used by DynamicZip.

Kamp-Data is a reseller of CCH products, so you can purchase the ZIPsales Database and other CCH products from us at the same time as your DynamicZip purchase.

DynamicZip Features

DynamicZip is an affordable solution to multi-state sales tax compliance and is written in Dexterity to provide seamless integration with Microsoft Dynamics GP.

Microsoft Dynamics GP [Tax Details](#) & [Tax Schedules](#)

- ➔ DynamicZip utilizes the Microsoft Dynamics GP tax details and tax schedules created by the import of the ZIPsales Database into Microsoft Dynamics GP.
- ➔ Tax calculations are performed by the Microsoft Dynamics GP tax engine.
- ➔ Reports are generated from data contained in Microsoft Dynamics GP - not an external program.
- ➔ Automatic creation and maintenance of Microsoft Dynamics GP sales tax details and schedules.
- ➔ Handles overrides, splits, *maximums*, and other rate exceptions.
- ➔ Track state, county, city, and local taxes separately.
- ➔ Set sales tax posting accounts by Administrator or range of tax details.
- ➔ Item classes may be designated as taxable in some states and non-taxable in others.
- ➔ Use tax rates can be substituted for sales tax rates on a state-by-state basis.
- ➔ Default taxable and exempt schedules can be manually created and designated for automatic selection on a state-by-state basis. (This feature provides a simple way to accommodate states not imported from the ZIPsales™ Database.)

Purchase Tax Accrual

- Calculate and accrue use tax on purchases, even if not billed by the vendor.
- Taxes billed by the vendor will offset the use tax accrual.
- Enabled in Microsoft Dynamics GP [Payables Transaction Entry](#), [Receivings Transaction Entry](#) and [Purchasing Invoice Entry](#).

Easy Tax Schedule Assignment

- Automatic assignment of tax schedules to existing customer base.
- Automatic selection of appropriate tax schedule for customers and orders based on the Geocode of the order's ship-to address.
- Geocode selection is simplified by the use of city, state, and ZIP Code.

Zip Addressing

- Enter addresses more quickly and accurately.
- Enter the ZIP Code and the Zip Addressing feature will fill in the city and state fields automatically.
- Multiple import sources supported for the creation and maintenance of the Zip Addressing table.
- The Zip Addressing feature is enabled in the following Microsoft Dynamics GP windows:
 - Customer Maintenance
 - Customer Address Maintenance
 - Invoice Ship To Address Entry
 - Sales Ship To Address Entry
 - Sales Prospect Maintenance
 - Vendor Maintenance
 - Vendor Address Maintenance
 - Purchasing Ship To Address Entry
 - IV Site Maintenance

Advanced Tax Reporting

- Reports are extracted from Microsoft Dynamics GP transaction history.
- A single report can include transactions from multiple modules such as SOP and RM.
- Sales tax reports can be generated on the cash or accrual basis.
- Summary and detailed reports are available.
- Special tax reports (predefined for individual states in build 60 & later) included in DynamicZip Report Wizard to ease the completion of state sales tax returns.
- Range restrictions available include City, State, or County based on either the ship-to address or the tax schedule selection.
- Other range restrictions include Authority, Customer ID, Document Date, Document Number, Tax Detail ID, Tax Schedule ID, and many others.

Tax by Item Class

Some items or services are taxable in certain states and exempt in others. How does DynamicZip handle this situation?

With DynamicZip, you have two options available to deal with this situation. The DynamicZip solution is our Tax by Item Class feature. The Microsoft Dynamics GP solution is Advanced Tax Calculation. You can mix and match these solutions as desired. In other words, you can use Tax by Item Class for some items and [Advanced Tax Calculation](#) for others.

ZIP+4 Option

This optional feature provides integration with the ZIP+4 file available from CCH. It provides positive, automatic identification of counties for all addresses that include the ZIP Code plus 4 extension. (This feature does NOT automatically calculate the correct ZIP+4 for your address record.)

Auto-correct City Spelling

This feature, if enabled, acts as an auto-correct function for city names based on the ZIP Code selected.

Current Sales Tax Data

The ZIPsales™ Database is available on a subscription basis from CCH. DynamicZip should be used with each issue of the ZIPsales™ Database to update the details and schedules in Microsoft Dynamics GP. No modifications are required in Microsoft Dynamics GP.

- Support for all 50 states, Territories, and Canada. Maintain 10,000 tax rates imposed by more than 8,300 jurisdictions.
- Be on top of hundreds of changes on a monthly basis.
- Free up precious resources by reducing your tax compliance burden.



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