

# Taxes Profiles

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## Section overview

**Taxes profiles**, equally as **Time profiles**, is a JeraSoft Billing tool that makes the process of clients' **rate tables** management exceptionally agile. Taxes profile is a **set of tax rules** that can be applied to client's rate tables in different taxation schemes. This section allows you to add, edit, and delete profiles and is presented in the form of a table with the following columns (see screenshot):

*Screenshot: Taxes Profiles section*

Taxes Profiles

+ New Taxes Profile

Rows 1 – 8 of 8

20

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ID		Name	Profile Owner	Notes		
7	%	complex tax	Reseller A			
10	%	GrTax10,5	Reseller C	GrTax10,5Notes		
6	%	high tax	Reseller A			
2	%	Low tax	Reseller A			
4	%	medium tax	Reseller A			
8	%	Tax_high_A	Reseller D			
9	%	Tax_National_A	Reseller D			
11	%	Test12				

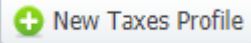



About

0.0700s

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Column Name	Description
ID	Taxes profile's identification number
Name	Name of a taxes profile
Profile Owner	List of resellers corresponding taxes profile was assigned to
Notes	Additional information regarding a taxes profile

Functional **buttons/icons** presented in the section are as follows:

Button/Icon	Description
	Allows to create a new taxes profile
	Allows to manage an existing taxes profile on a list
	Allows deleting a taxes profile from the system. Requires confirmation
	Allows to manage a list of tax values of a particular profile
	Opens the Advanced Search drop-down menu

## Advanced Search

In the top right corner of the section above the table, an **Advanced Search** drop-down menu is located. By clicking on a blue downward arrow  icon, a drop-down menu with the following structure is displayed:

*Screenshot: Advanced Search drop-down menu*

Profile Owner:

all resellers

Status:

Active

Reset

Search

Field	Description
<b>Profile Owner</b>	Select from the list of all Resellers, Sub-resellers and Managers registered in the system
<b>Status</b>	Select the status of a taxes profile: To apply the specified search criteria, click the <b>Search</b> button; to cancel the applied parameters, click the <b>Reset</b> button. <ul style="list-style-type: none"> <li>• <b>Active</b></li> <li>• <b>Archive</b></li> </ul>

## Creating a New Taxes Profile

To create a new profile, you need to:

- Click the **New Taxes Profile** button
- Fill in mandatory fields (specified in the table below)
- Click the **OK** button

Screenshot: New Taxes Profile window

% Taxes Profiles

Name:

Profile Owner:

all resellers

Invoice Notes:

Notes:


OK

Cancel

Apply

Field	Description
<b>Name</b>	Name of a taxes profile
<b>Profile Owner</b>	Select from the list of all Resellers, Sub-resellers and Managers registered in the system
<b>Invoice Notes</b>	If specified, this information will be displayed in issued invoices
<b>Notes</b>	Additional information regarding a taxes profile

## Tax Values Management

To manage a tax value, you need to click the  icon to the left of a corresponding profile name on the list. In the pop-up window you can add a new rule by clicking **Add Tax Value** or edit already existing values. The structure of a pop-up window is as follows:

Screenshot: Tax Values Management

**Taxes Profiles**

complex tax

Add Tax Value

Rows 1 – 3 of 3

20 ▼

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Name	Value, %	Effective From	Tag	Priority	
basic	15	2014-05-08 00:00:00+00	@	1	
additional	5	2014-05-08 00:00:00+00	@	2	
national	3	2014-05-08 00:00:00+00	@	3	

OK

Cancel

Apply

Field	Description
<b>Name</b>	Name of the tax value added to this profile
<b>Value</b>	Specify a tax value in %
<b>Effective from</b>	Start date of a corresponding tax value
<b>Tag</b>	Specify tag(s) you would like to be applied to corresponding tax value. If no tags are added, you can leave the field blank
<b>Priority</b>	Specify the priority of tax value usage

While operating with tax values, you can apply **Advance Search** to find the value you might be interested in. To do so, click on a red downward arrow in the top right corner of the pop-up window and set the **Status** and **Status Date** fields:

- **Status:**
  - **current on** - if chosen, all tax values with the latest **Effective from** field value will be displayed
  - **old for** - if chosen, all tax values, whose **Effective from** field value is **older** in comparison to its current one, will be displayed
  - **future for** - if chosen, all tax values, whose **Effective from** field value **> Date**, will be displayed
  - **all** - if chosen, **all** tax values will be displayed
- **Date** - set the time and date that will be applied for the search.

By default, tax values displayed in a pop-up window are filtered by the **current on** status.

#### Tip

In cases when you determine a **Priority** status, you basically set the order of the taxation. So, *the tax with **Priority 1*** will add % tax to operation sum, the *tax with **Priority 2*** will add tax % to the **resulted sum** (operation sum + 1<sup>st</sup> tax %). Each following priority will add % tax to operation sum plus all the previous priorities values.

For example:

If operation sum is **100 USD**, and there is a single tax with **Priority 1** and a **value of 10%**, the taxation result will be **10 USD**, so full operation plus tax is **110 USD**.

If there are **two taxes** with priorities of 1 and 2, and values of 10% and 20%, respectively, then the **first tax yield** will be **10 USD**, and **second tax yield** will be **22 USD** (because 20% is calculated from sum of operation + previous tax), and total will be **100 + 10 + 22 = 132 USD**.

#### Warning

You **cannot** delete or archive a tax profile that is **currently assigned** to the *Client, Call Shop, Reseller, or Calling Card*