Taxes Profiles

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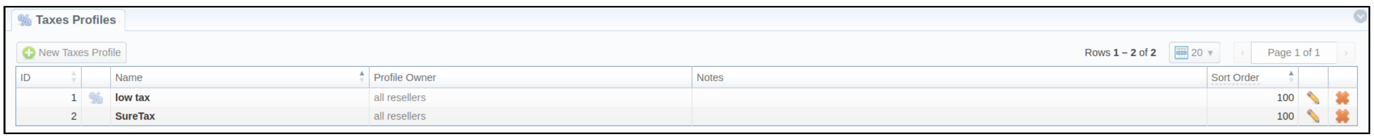
Section overview

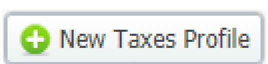
Taxes profiles, equally as Time profiles, is a JeraSoft Billing tool that makes the process of clients' rate tables management exceptionally agile. Taxes profile is a **set of tax rules** that can be applied to client's rate tables in different taxation schemes. This section allows you to add, edit,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

Screenshot: Taxes Profiles section



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
Sort Order	Order of the entity in the list

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

Field	Description
Profile Owner	Select from the list of all Resellers, Sub-resellers and Managers registered in the system
Status	Select the status of a taxes profile: • ***Active*** • ***Archive***

To apply the specified search criteria, click the **Search** button; to cancel the applied parameters, click the **Reset** button.

Creating a New Taxes Profile

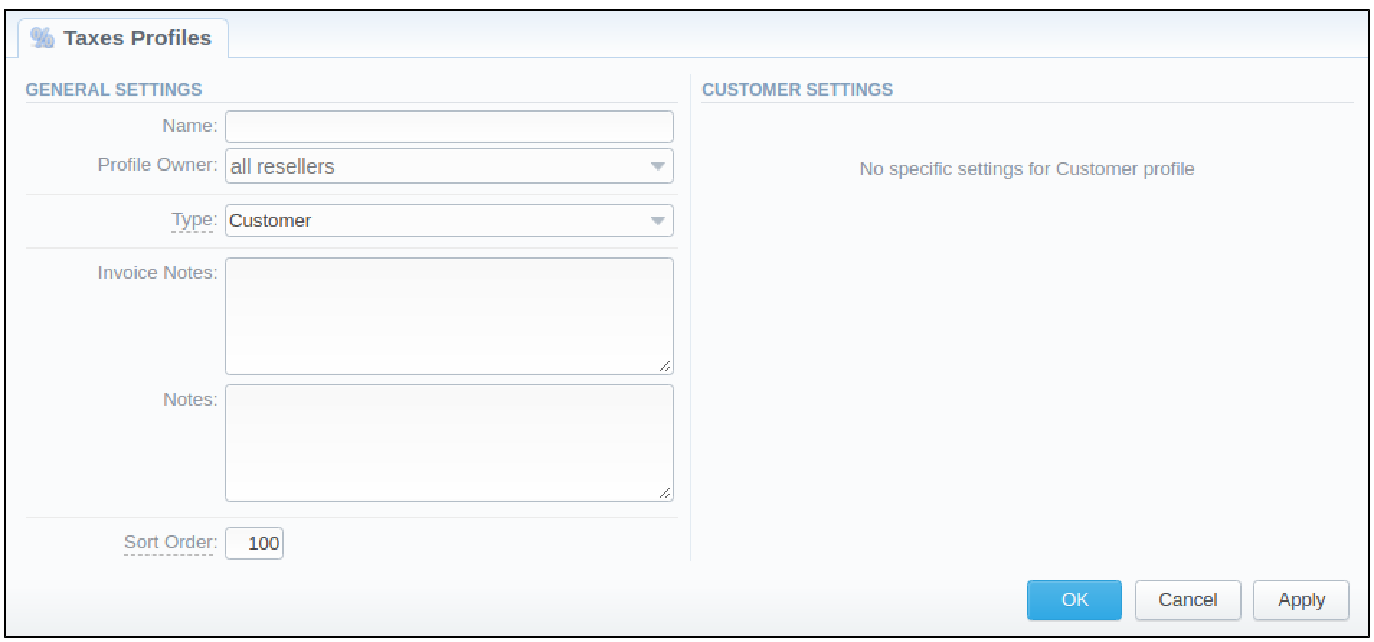
To create a new profile, you need to:

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

Starting from **JeraSoft Billing v3.21.0**, we have introduced the integration with a third-party tax calculation service called **Compliance**. In addition to **SureTax** service we had integration with before, now you have one more advanced option to calculate taxes. Please also note that there are no pre-generated taxes profiles in the system anymore.

You can select the type of a taxes profile while creating a profile:

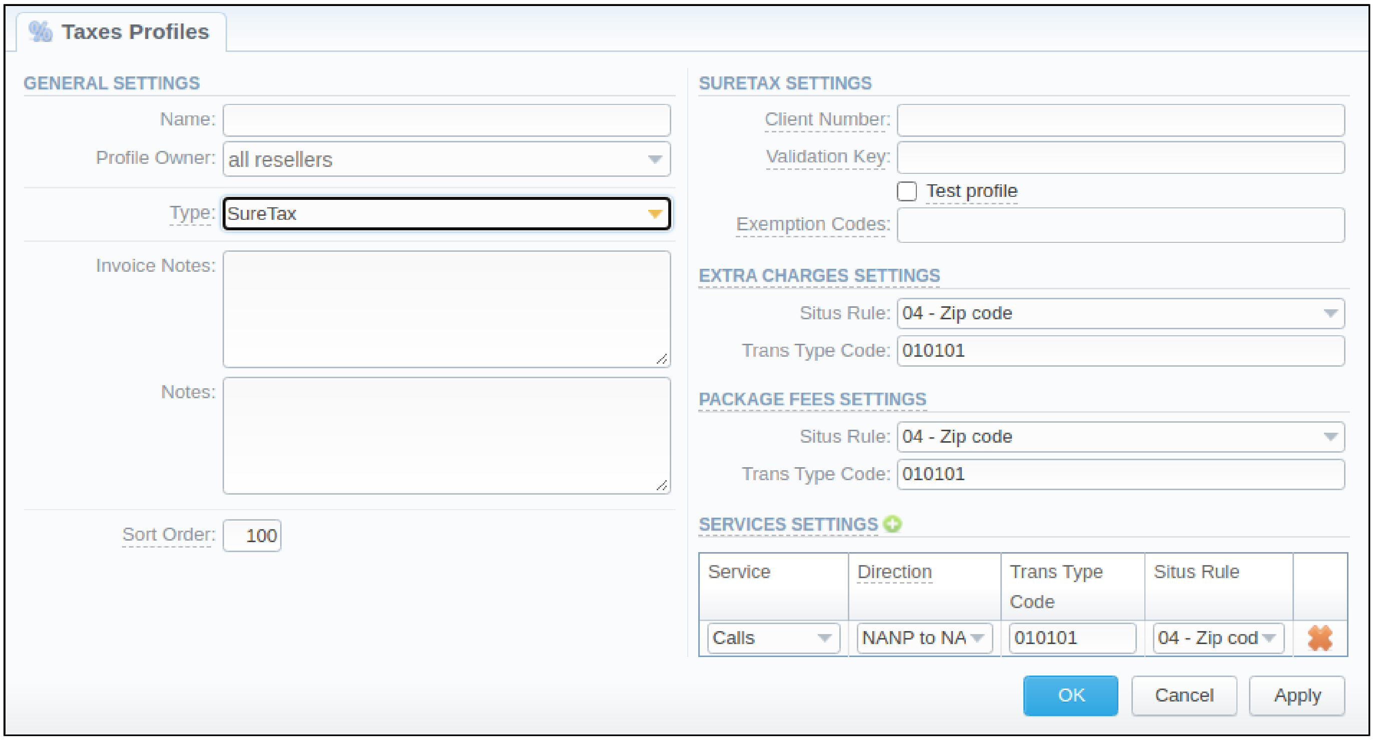
Screenshot: New Taxes Profile window (Customer)



Field	Description
Name	Name of a taxes profile
Profile Owner	Select from the list of all Resellers, Sub-resellers and Managers registered in the system
Type	Select the tax profile type from a drop-down list: • **Customer** • **SureTax** • **Compliance**

Invoice Notes	If specified, this information will be displayed in issued Invoices
Notes	Additional information regarding a taxes profile
Sort Order	Order of the entity in the list

Screenshot: New Taxes Profile window (SureTax)

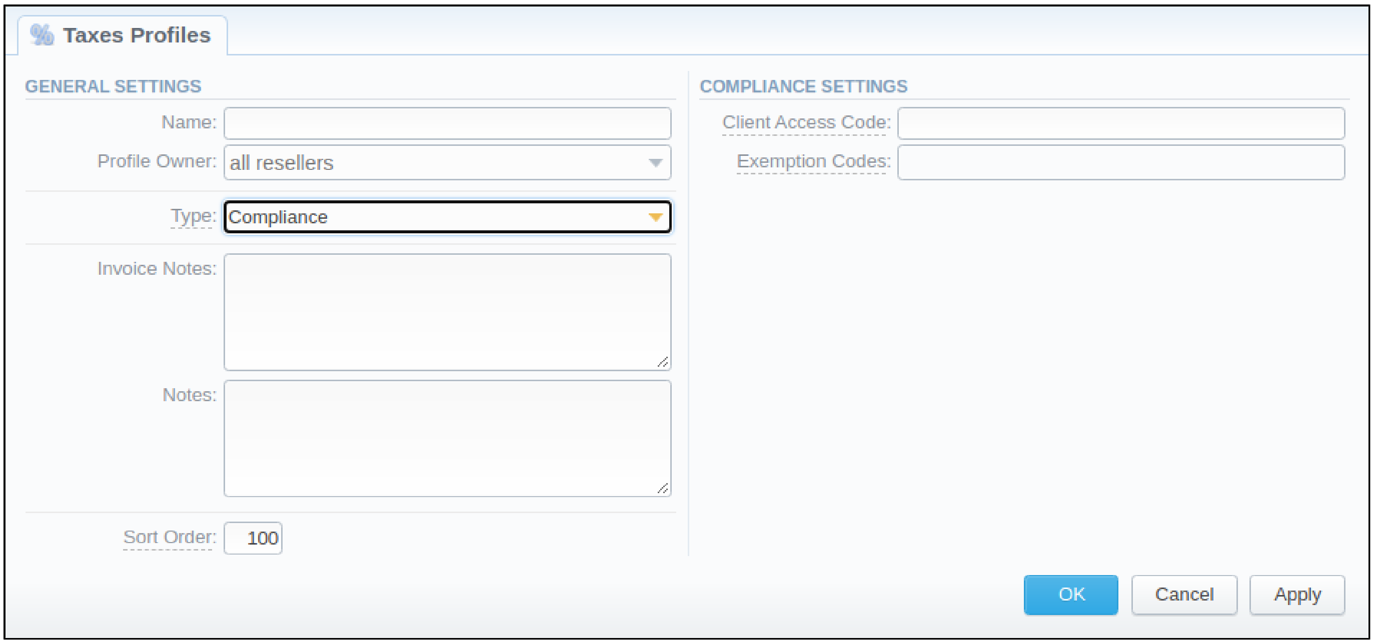


Section	Field	Description
General Settings	***Name***	Name of a taxes profile
	Profile Owner	Select from the list of all Resellers, Sub-resellers and Managers registered in the system
	Type	Select the tax profile type from a drop-down list: • **Customer** • **SureTax** • **Compliance**
	Invoice Notes	If specified, this information will be displayed in issued invoices
	Notes	Additional information regarding a taxes profile
	Sort Order	Order of the entity in the list
SureTax Settings	***Client Number***	Used when issuing invoices for clients with selected SureTax profile
	Validation Key	Used for clients with selected SureTax profile
	***Test profile** checkbox*	Check to specify that a created SureTax profile is a test one
	Exemption Codes	List Tax Exemption Codes to not calculate them within this profile

Extra Chagres Settings		Default settings for Extra Charges taxation. **Tip** You can set <u>separate</u> Rules/Codes per Extra Charge if needed. For this, when creating an ***Extra Charge*** in **Transactions**, add a ***Tag***, specifying either: • only Trans Type Code, like ***suretax:010101***; • only Situs Rule, like ***suretax:04***; or • both Situs Rule and Trans Type Code, like ***suretax:04-010101***.
	Situs Rule	Select a Situs Rule from the list of available ones: • ***04 - Zip code*** • ***05 - Zip code + 4***
	Trans Type Code	Specify a Trans Type Code for this Rule (e.g., ***010101***)
Package Fees Settings		Default settings for Package Fees taxation. **Tip** You can set <u>separate</u> Rules/Codes per Package Fee if needed. For this, when adding a ***Fee*** to a **Package**, set a ***Tag***, specifying either: • only Trans Type Code, like ***suretax:010101***; • only Situs Rule, like ***suretax:04***; or • both Situs Rule and Trans Type Code, like ***suretax:04-010101***.
	Situs Rule	Select a Situs Rule from the list of available ones: • ***04 - Zip code*** • ***05 - Zip code + 4***
	Trans Type Code	Specify a Trans Type Code for this Rule (e.g., ***010101***)
Services Settings		Default settings for Services taxation. **Tip** You can set <u>separate</u> Rules/Codes per Account if needed. For this, when creating an **Account**, add a ***Tag***, specifying either: • only Trans Type Code, like ***suretax:010101***; • only Situs Rule, like ***suretax:04***; or • both Situs Rule and Trans Type Code, like ***suretax:04-010101***. You can also do this via the **Traffic Processing** section by creating a rule that will be adding needed ***Tags*** to traffic.
	Service	Set a Service for the rule: • ***Calls*** • ***SMS*** • ***Data***

Direction	Select a Direction from the list of available ones: • ***NANP to NANP*** • ***NANP to non-NANP*** • ***non-NANP to NANP*** • ***non-NANP to non-NANP***
Trans Type Code	Specify a Trans Type Code for this Rule (e.g., ***010101***)
Situs Rule	Select a Situs Rule from the list of available ones: • ***01 - Two-out-of-Three test using NPA-NXX*** • ***02 - Billed to number*** • ***03 - Origination number*** • ***04 - Zip code*** • ***05 - Zip code + 4***

Screenshot: New Taxes Profile window (Compliance)



Field	Description
Name	Name of a taxes profile
Profile Owner	Select from the list of all Resellers, Sub-resellers and Managers registered in the system
Type	Select the tax profile type from a drop-down list: • **Customer** • **SureTax** • **Compliance**
Invoice Notes	If specified, this information will be displayed in issued invoices
Notes	Additional information regarding a taxes profile
Sort Order	Order of the entity in the list
Client Access Code	Used when issuing invoices for clients with selected Compliance profile
Exemption Codes	List Tax Exemption Codes to not calculate them within this profile

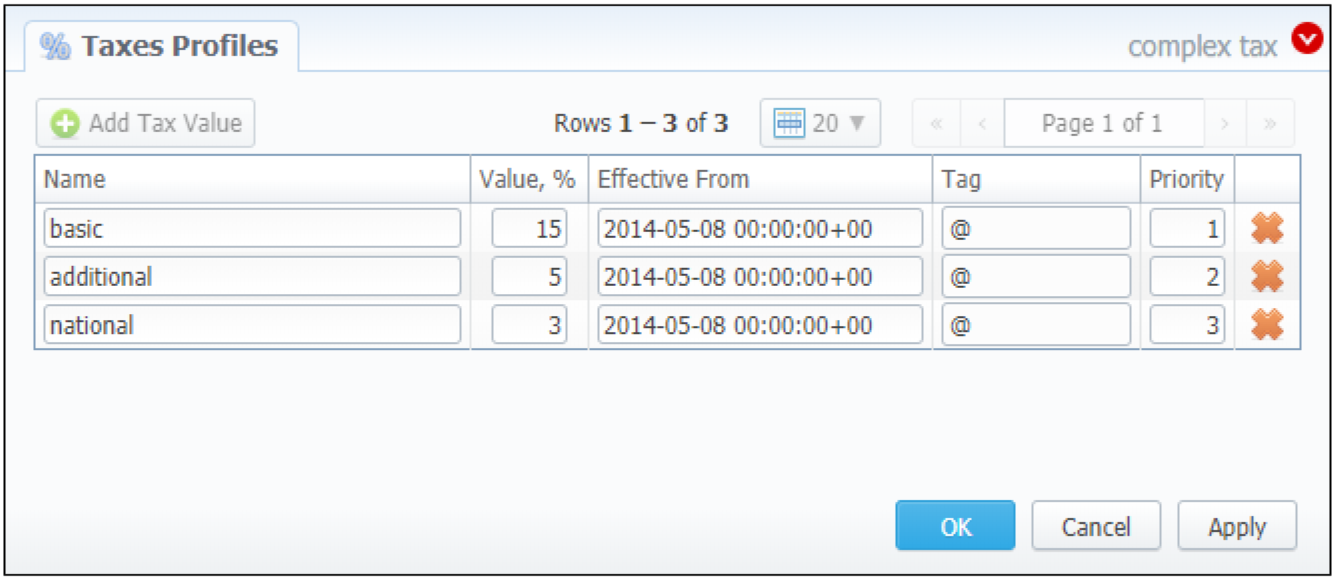
While using **SureTax** or **Compliance** profile type, the tax values cannot be managed manually in the system as the taxes will be automatically dipped from third-party tax calculation services. Only the **Customer** profile allows managing the tax values.

Please note that you cannot change the taxes profile **type** after the creation is completed.

Tax Values Management

To manage a tax value within the **Customer** type of the taxes profile, 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



Field	Description
Name	Name of the tax value added to this profile
Value	Specify a tax value in **%**
Effective from	Start date of a corresponding tax value
Tag	Specify tag(s) you would like to be applied to corresponding tax value. If no tags are added, you can leave the field blank
Priority	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 icon 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 + 1st 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*