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 (clickable, to access taxation values for ***Customer*** type 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
New Taxes Profile	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
	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

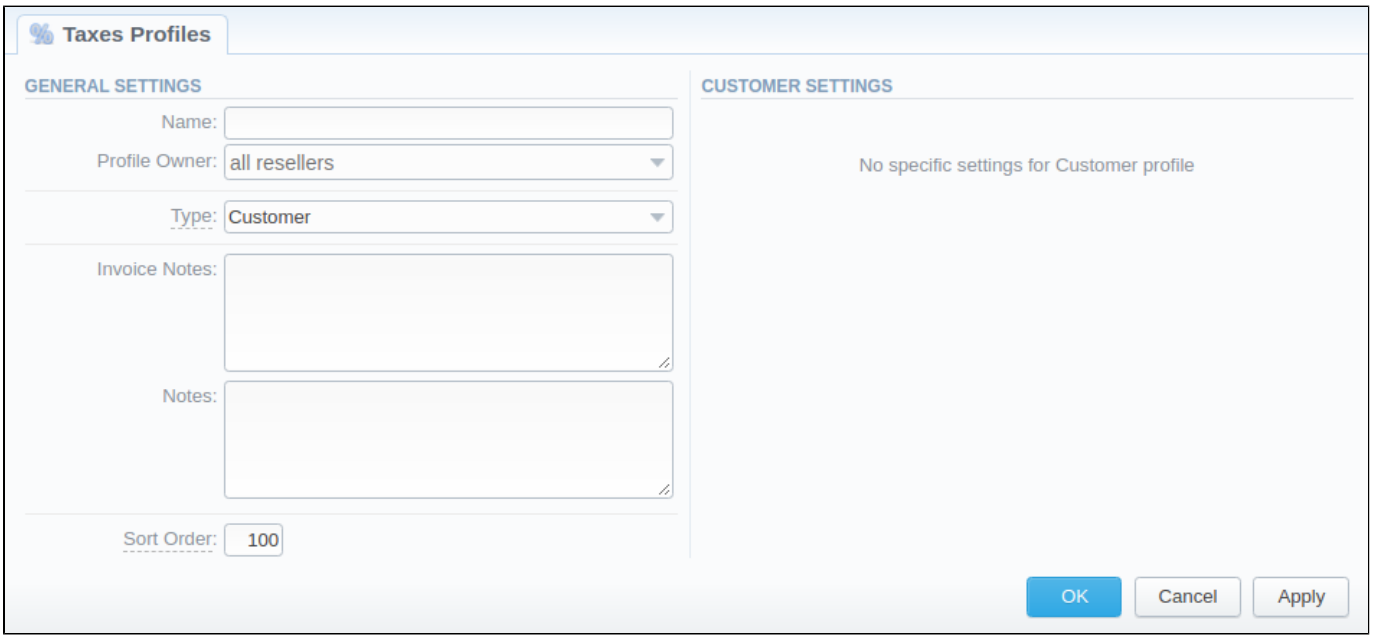
To create a new profile, you need to:

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

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

Type: Customer

Screenshot: New Taxes Profile window (Customer)

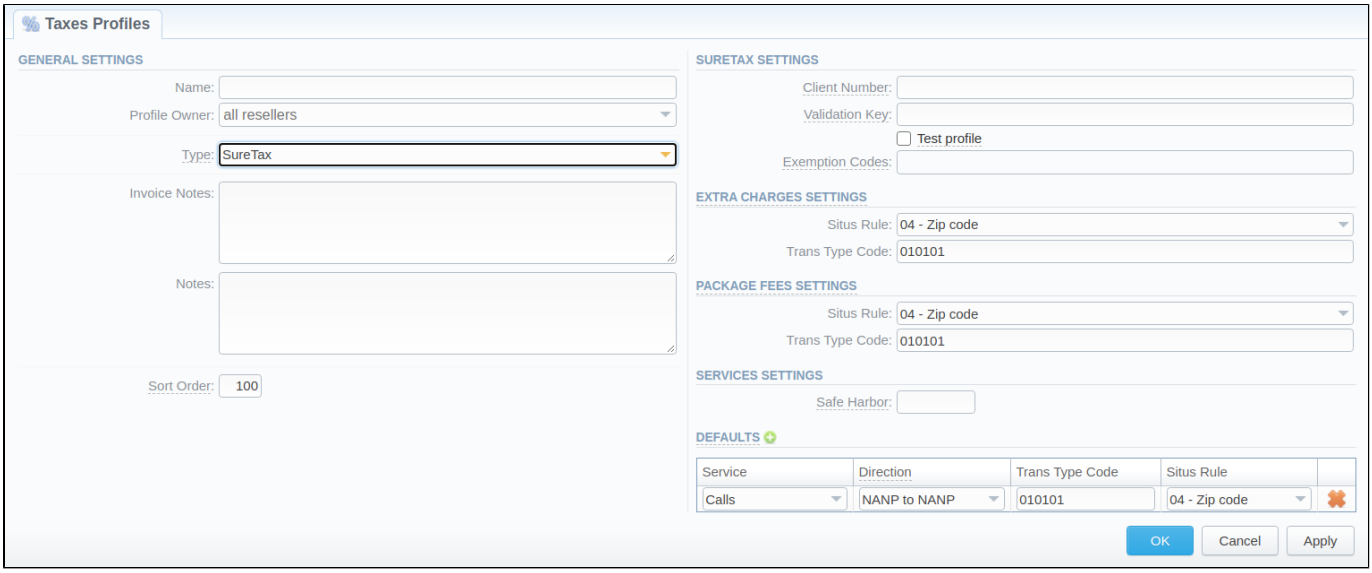


Field	Description
Name	Name of a taxes profile
Profile Owner	Select from the list of all Resellers, Sub-resellers and Managers registered in the system
Type	Select the tax profile type from a drop-down list: • **Customer** • **SureTax** • **Compliance Solutions** • **Avalara**

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

Type: SureTax

Screenshot: New Taxes Profile window (SureTax)

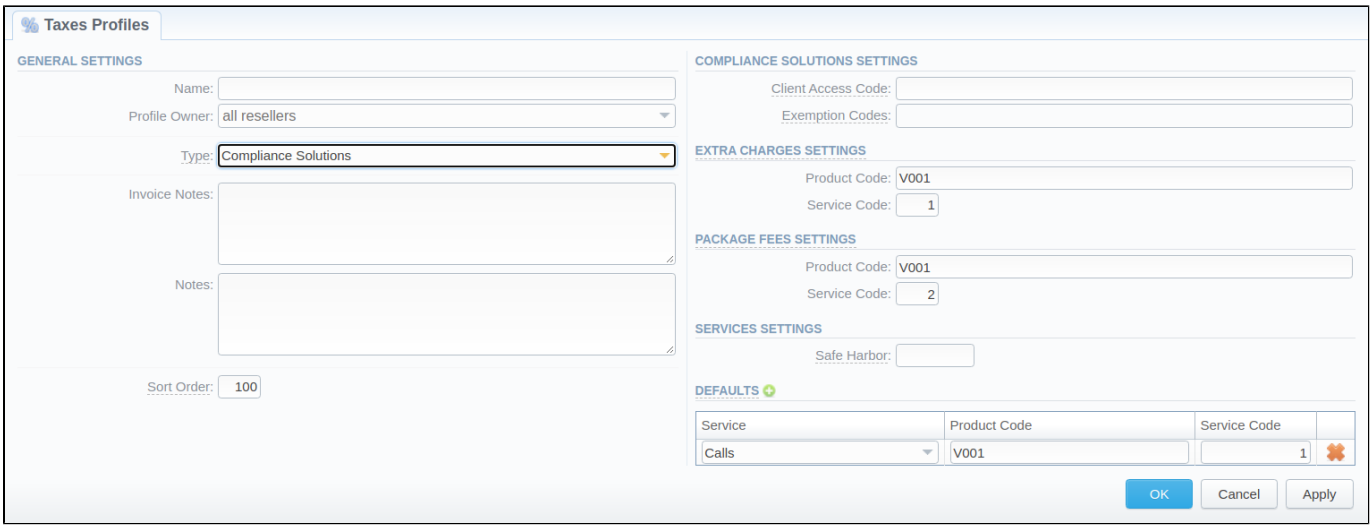


Section	Field	Description
General Settings	***Name***	Name of a taxes profile
	Profile Owner	Select from the list of all Resellers, Sub-resellers and Managers registered in the system
	Type	Select the tax profile type from a drop-down list: • **Customer** • **SureTax** • **Compliance Solutions** • **Avalara**
	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 separate Rules/Codes per Extra Charge if needed. For this, when creating an ***Extra Charge*** in **Transactions**, add a ***Tag***, specifying 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 separate Rules/Codes per Package Fee if needed. For this, when adding a ***Fee*** to a **Package**, set a ***Tag***, specifying 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	***Safe Harbor***	Specify a numeric value to set static traffic distribution between interstate/intrastate **Note** The Safe Harbor logic applies to transactions for services only (i.e. calls).
Defaults	Default settings for Services taxation. **Tip** You can set separate Rules/Codes per Account if needed. For this, when creating an **Account**, add a ***Tag***, specifying 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***

Type: Compliance Solutions

Screenshot: New Taxes Profile window (Compliance Solutions)



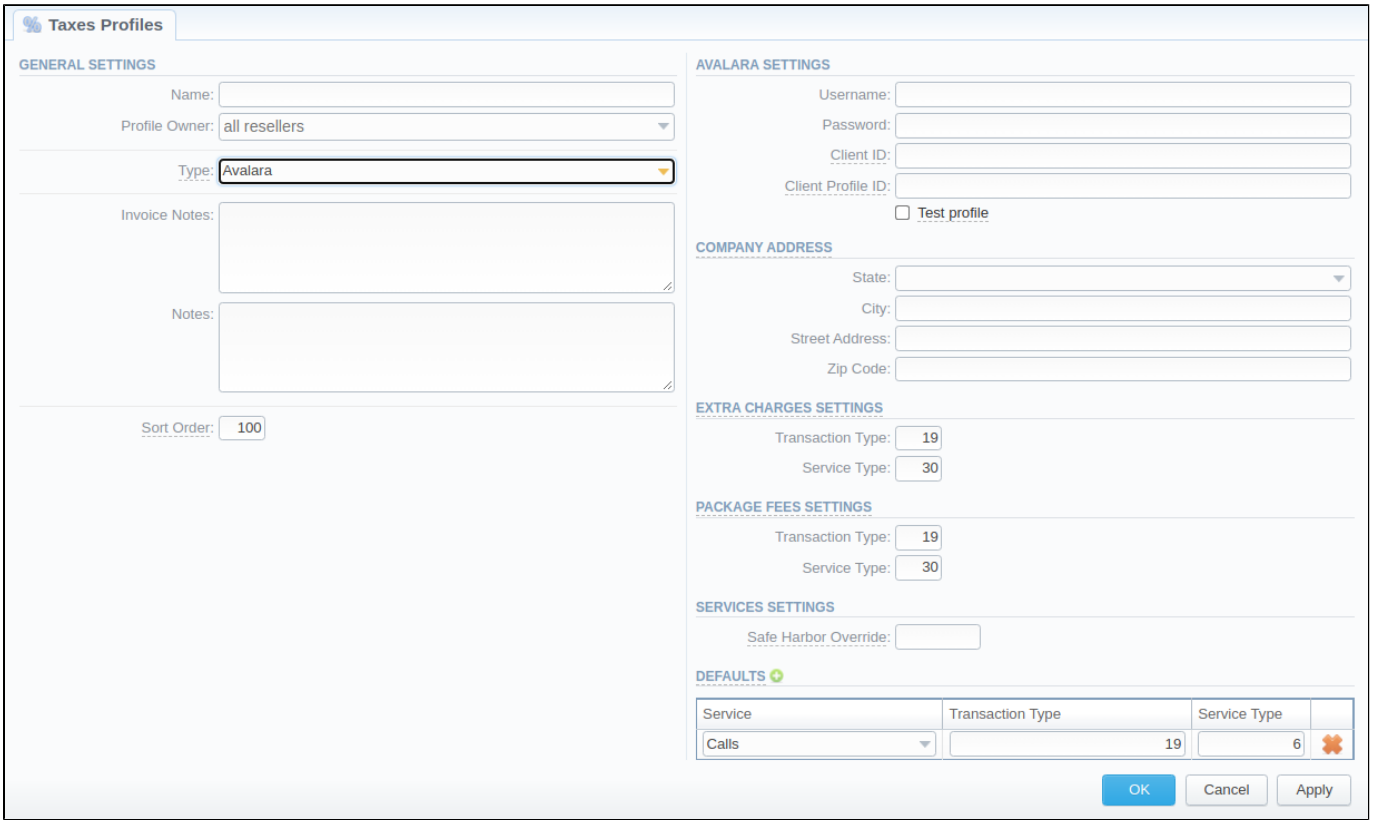
Section	Field	Description
General Settings	***Name***	Name of a taxes profile
	Profile Owner	Select from the list of all Resellers, Sub-resellers and Managers registered in the system
	Type	Select the tax profile type from a drop-down list: • **Customer** • **SureTax** • **Compliance Solutions** • **Avalara**
	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
Compliance Solutions Settings	***Client Access Code***	Used when issuing invoices for clients with selected Compliance Solutions profile
	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 separate Codes per Extra Charge if needed. For this, when creating an ***Extra Charge*** in **Transactions**, add a ***Tag***, specifying both Product Code and Service Code, like ***compliance:V001-1***.	
	Product Code	Specify the Product Code for the Extra Charges
	Service Code	Specify the Service Code for the Extra Charges
Package Fees Settings	Default settings for Package Fees taxation **Tip** You can set separate Codes per Package Fee if needed. For this, when adding a ***Fee*** to a **Package**, set a ***Tag***, specifying both Product Code and Service Code, like ***compliance:V001-1***.	
	Product Code	Specify the Product Code for the Package Fees
	Service Code	Specify the Service Code for the Package Fees

Services Settings	***Safe Harbor Override***	Specify a numeric value to set static traffic distribution between interstate/intrastate **Note** The Safe Harbor logic applies to transactions for services only (i.e. calls). Fill in this field to request Compliance Solutions to override static distribution. If the field is empty, defined static distribution will be used.
Defaults	Default settings for Services taxation	
	Service	Set a Service for the rule: • ***Calls*** • ***SMS*** • ***Data***
	Product Code	Specify the Product Code for the Service
	Service Code	Specify the Service Code for the Service

While using **SureTax** or **Compliance Solutions** 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.

Type: Avalara

Screenshot: New Taxes Profile window (Avalara)



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 Solutions** • **Avalara**
	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
Avalara Settings	***Username***	Company's username in Avalara
	Password	Company's password in Avalara
	Client ID	Unique identifier of your company provided by Avalara
	Client Profile ID	Avalara Profile ID you want to use. Leave empty for default configuration
	Test profile *checkbox*	Check to specify that a created Avalara profile is a test one
Company Address	Company address that will be used as billing address. Please fill in the respective: • ***State*** • ***City*** • ***Street Address*** • ***Zip Code***	
Extra Chagres Settings	Default settings for Extra Charges taxation **Tip** You can set separate Codes per Extra Charge if needed. For this, when creating an ***Extra Charge*** in **Transactions**, add a ***Tag***, specifying both Transaction Type and Service Type, like ***avalara:19-30***.	
	Transaction Type	Specify the Transaction Type for the Extra Charges
	Service Type	Specify the Service Type for the Extra Charges
Package Fees Settings	Default settings for Package Fees taxation **Tip** You can set separate Codes per Package Fee if needed. For this, when adding a ***Fee*** to a **Package**, set a ***Tag***, specifying both Transaction Type and Service Type, like ***avalara:19-30***.	
	Transaction Type	Specify the Transaction Type for the Package Fees
	Service Type	Specify the Service Type for the Package Fees
Services Settings	***Safe Harbor Override***	Specify a numeric value to set static traffic distribution between interstate/intrastate **Note** The Safe Harbor logic applies to transactions for services only (i.e. calls). Fill in this field to request Avalara to override standard static distribution. If the field is empty, defined static distribution will be used.
Defaults	Default settings for Services taxation	

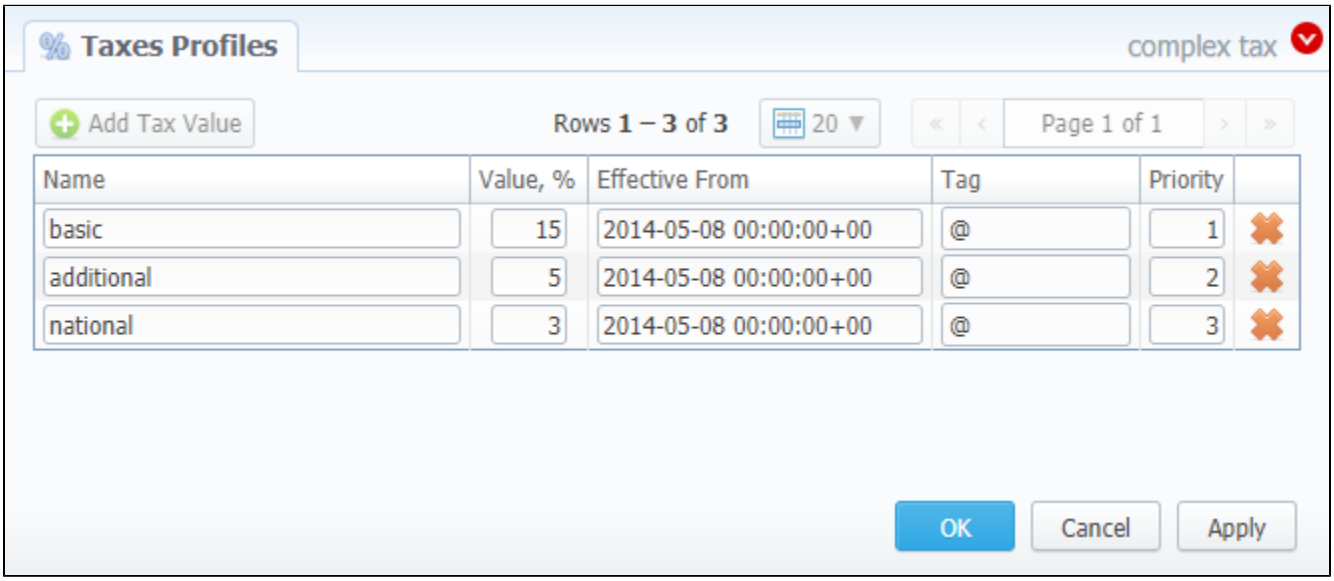
	Service	Set a Service for the rule: • ***Calls*** • ***SMS*** • ***Data***
	Transaction Type	Specify the Transaction Type for the Service
	Service Type	Specify the Service Type for the Service

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

Tax Values Management

To manage a tax value within the **Customer** type of the taxes profile, you need to click the respective profile name. 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*