Taxes Profiles

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 Type: SureTax
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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						0
O New Taxes Profile		Rows 1	- 2 of 2 📰 20 v	< Pag	ge 1 of 1	
ID 🕆 Name 🗍	Profile Owner	Notes	Sor	ort Order	*	1
1 SureTax	all resellers			10	00 📏	
2 VAT	all resellers			10	00 📏	
						_

Column Name	Description
ID	Taxes profile's identification number
Name	Name of a taxes profile (clickable, to access taxation values for <i>Customer</i> 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
S	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

				٥
Profile	e Owner:	all resellers		•
	Status:	Active		•
			Reset	Search
Field	Descr	ption		
D ("' O	0.1.1			

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

Active

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 Solutions. In addition to the 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:

Type: Customer

Profile Owner

Screenshot: New Taxes Profile window (Customer)

% Taxes Profiles		
GENERAL SETTINGS		CUSTOMER SETTINGS
Name	:	
Profile Owner	all resellers	No specific settings for Customer profile
Туре	Customer	
Invoice Notes	:	
Notes		
Sort Order	: 100	
		OK Cancel Apply
Field Des	cription	
Name Name	e of a taxes profile	

Select from the list of all Resellers, Sub-resellers and Managers registered in the system

Туре	Select the tax profile type from a drop-down list:	
	 Customer SureTax Compliance Solutions 	
Invoice Notes	If specified, this information will be displayed in issued Invoices	
Notes	Additional information regarding a taxes profile	
Sort Order Type: Sure	Order of the entity in the list Tax	

Screenshot: New Taxes Profile window (SureTax)

% Taxes Profiles						
GENERAL SETTINGS		SURETAX SETTINGS				
Name:		Client Nu	umber:			
Profile Owner:	all resellers 🔻	Validatio	n Key:			
Type	Sure Tax		Test profile			
		Exemption C	Codes:			
Invoice Notes:		EXTRA CHARGES SETTING	3S			
		Situs	s Rule: 04 - Zip code			-
		Trans Type	Code: 010101			
Notes:		PACKAGE FEES SETTINGS	5			
		Situs	s Rule: 04 - Zip code			•
		Trans Type	Code: 010101			
Cart Order	100	SERVICES SETTINGS				
Soft Order.	100	Safe H	Harbor:			
		DEFAULTS 😏				
		Service	Direction	Trans Type Code	Situs Rule	
		Calls	NANP to NANP	010101	04 - Zip code	- *
					OK Cancel	Apply

Section	Field	Description	
General	Name	Name of a taxes profile	
Profile Owner Type		Select from the list of all Resellers, Sub-resellers and Managers registered in the system	
		Select the tax profile type from a drop-down list: Customer SureTax Compliance Solutions	
	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		Order of the entity in the list	
SureTax	Client Number	Used when issuing invoices for clients with selected SureTax profile	
Settings	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. Image: 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	Default settings for Package	ge Fees taxation.	
Settings	Vou can set <u>separ</u> specifying both Si	rate Rules/Codes per Package Fee if needed. For this, when adding a Fee to a Package , set a Tag , tus 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., <i>010101</i>)	
Services	Safe Harbor	Specify a numeric value to set static traffic distribution between interstate/intrastate	
Settings		Note The Safe Harbor logic applies to transactions for services only (i.e. calls).	
Defaults	Default settings for Service	es taxation.	
	 Tip You can set <u>separate</u> Rules/Codes per Account if needed. For this, when creating an Account, add a <i>Tag</i>, specifying both Situs Rule and Trans Type Code, like <i>suretax:04-010101</i>. You can also do this via the Traffic Processing section by creating a rule that will be adding needed <i>Tags</i> 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., <i>010101</i>)	
	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)

% Taxes Profiles				
GENERAL SETTINGS		COMPLIANCE SOLUTIONS SETTINGS	6	
Name:		Client Access Code:		
Profile Owner:	all resellers 💌	Exemption Codes:		
Туре:	Compliance Solutions	EXTRA CHARGES SETTINGS		
Incode a Martine		Product Code: V0	001	
Invoice Notes:		Service Code:	1	
		PACKAGE FEES SETTINGS		
		Product Code: V0	001	
Notes:		Service Code:	2	
		SERVICES SETTINGS		
	8	Safe Harbor:		
Sort Order:	100	DEFAULTS 😏		
		Service	Product Code	Service Code
		Calls	- V001	1
				Cancel Apply

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	
	Туре	Select the tax profile type from a drop-down list:	
		 Customer SureTax Compliance Solutions 	
	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	Client Access Code	Used when issuing invoices for clients with selected Compliance Solutions profile	
Settings	Exemption Codes	List Tax Exemption Codes to not calculate them within this profile	
Extra Chagres	Default settings f	for Extra Charges taxation	
coungo	You can add a 7	set <u>separate</u> Codes per Extra Charge if needed. For this, when creating an <i>Extra Charge</i> in Transactions , ag, specifying both Product Code and Service Code, like <i>compliance:V001-1</i> .	
	Product Code	Specify the Product Code for the Extra Charges	
	Service Code	Specify the Service Code for the Extra Charges	
Package Fees Default settings for Package Fees taxation		for Package Fees taxation	
	You can specifyir	set <u>separate</u> Codes per Package Fee if needed. For this, when adding a <i>Fee</i> to a Package , set a <i>Tag</i> , ng both Product Code and Service Code, like <i>compliance:V001-1</i> .	
	Product Code	Specify the Product Code for the Package Fees	
	Service Code	Specify the Service Code for the Package Fees	

Services Settings	Safe Harbor O verride	Specify a numeric value to set static traffic distribution between interstate/intrastate Image: Specify a numeric value to set static traffic distribution between interstate/intrastate Image: Specify a numeric value to set static traffic distribution between interstate/intrastate Image: Specify a numeric value to set static traffic distribution between interstate/intrastate Image: Specify a numeric value to set static traffic distribution 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 - 64,9.	
Defaults	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)

% Taxes Profiles				
GENERAL SETTINGS		AVALARA SETTINGS		
Name:		Username:		
Profile Owner:	all resellers 💌	Password:		
Type:	Avalara	Client ID:		
		Client Profile ID:		
Invoice Notes:			lest profile	
		COMPANY ADDRESS		
		State:	▼	
Notes:		City: Street Address:		
		Zip Code:		
	*			
Sort Order:	100	Transaction Type:	19	
		Service Type:	30	
		DACKAGE EEES SETTINGS		
		Transaction Type: 19		
		Service Type: 30		
		Safe Harbor Override		
		DEFAULTS		
		Service	Transaction Type Service Type	
		Calls	• 19 6 🐺	
			OK Cancel Apply	

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 		
	<i>Invoice Notes</i> 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	Username	Company's username in Avalara		
Settings	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 State City Street Addres Zip Code	that will be used as billing address. Please fill in the respective:		
Extra Chagres	Default settings for	Extra Charges taxation		
Settings	 Tip You can set <u>separate</u> Codes per Extra Charge if needed. For this, when creating an <i>Extra Charge</i> in Transactions, add a <i>T</i> ag, 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 Default settings for Package Fees taxation Fees Settings		Package Fees taxation		
	Tip You can set <u>separate</u> Codes per Package Fee if needed. For this, when adding a <i>Fee</i> to a Package , set a <i>Tag</i> , specifying b oth Transaction Type and Service Type, like <i>avalara:19-30</i> .			
	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		
go		 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
<i>Transaction</i> <i>Type</i>	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 the creation is completed.

Tax Values Management

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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

% Taxes Profiles				complex tax
🕒 Add Tax Value	Ro	ws 1 – 3 of 3 🗰 20 🔻	« < Pag	elofl > >
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 🗯
			ОК Са	ancel Apply
eld Description				
me Name of the tax value a	added to this profile			
Specify a tax value in 9	/_			

Value	Specify a tax value in %
Effective from	Start date of a corresponding tax value
Тад	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 😢 i con 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