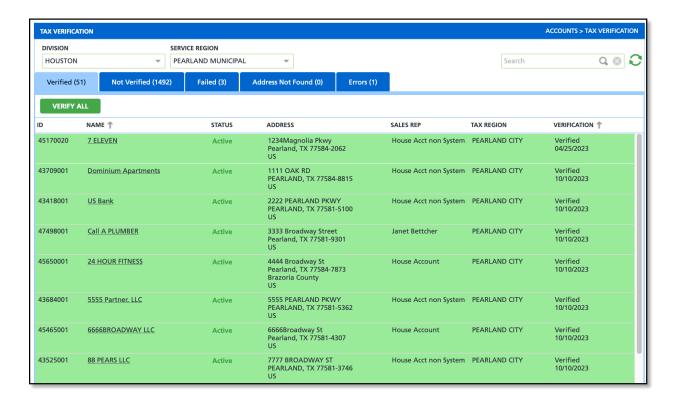
Tax Verification

Last Modified on 12/16/2024 8:29 am PST

Pathway: Accounts > Tax Verification

The Tax Verification screen is used to ensure that addresses and their associated tax regions are accurate. This process is essential to accurately calculate and apply appropriate taxes to service transactions.



Permissions

The following permissions are required to view the Tax Verification screen and make adjustments to the tax settings for a site.

Permission ID	Permission Name
5	View Account
6	View Site
137	Edit Site Taxing
281	Edit Account Billing Settings
282	Edit Site Billing Settings
444	Tax Verification

Verify a Site's Tax Region

Individual Site Verification

- 1. Select any of the tabs to view the sites it includes.
- 2. Click on the site you would like to review and verify. This will open the Edit Site popup editor.
- 3. Click on the drop down for the Tax Region field and select the region that applies.
- 4. Select Save when finished. Upon Save, the system will auto-refresh count totals for the affected tab(s).

Verify All

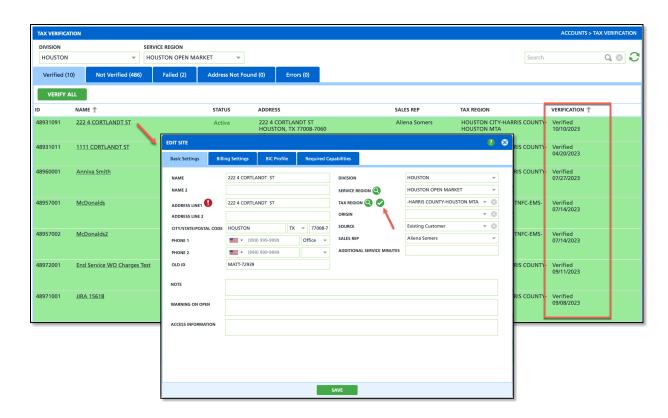
- 1. Select the 'Not Verified' tab.
- 2. Click on the 'Verify All' button. This will trigger a Confirmation popup.
- 3. Continue with the Validation by selecting "OK," or select "Cancel" to close the Confirmation and stop the verification process.

Tax Verification Screen Tabs

The section below reviews each of the tabs displayed on the Tax Verification screen.

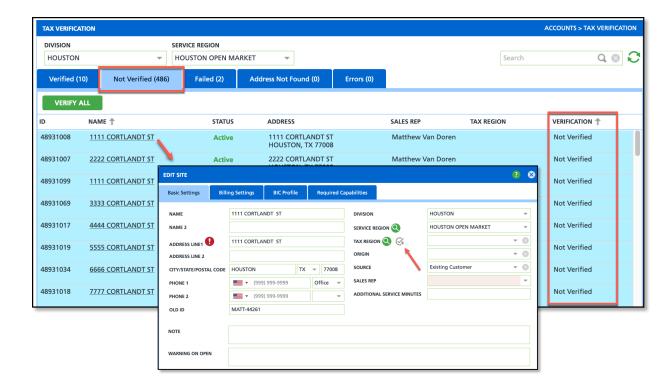
Verified

The "Verified" tab displays a list of all sites for which the tax region has been confirmed. When you access the Edit Site screen, this confirmation is represented by a green check mark next to the Tax Region.



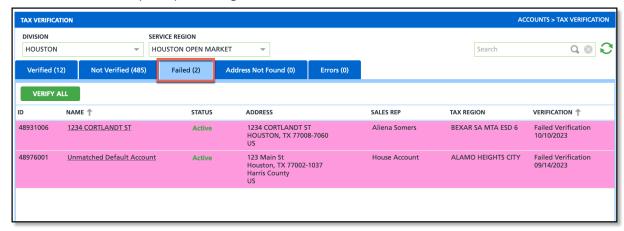
Not Verified

The "Not Verified" tab displays a list of all sites that do not have a verified tax region. This is indicated with a grayed-out check mark on the Edit Site screen. From the 'Not Verified' screen users can individually click through and verify each site, or select the 'Verify All' button and the system will run the verification process in the background.



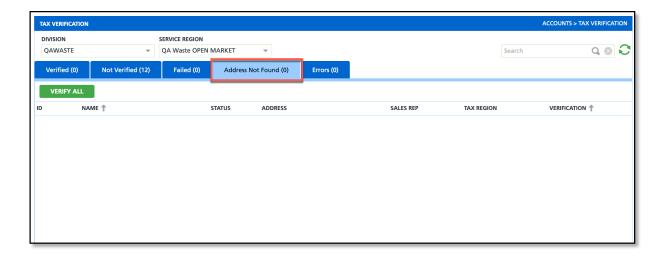
Failed

If verification fails, the site will display in the 'Failed' tab. The total count of sites that have not succeeded in verifying their tax region will be shown in parentheses. Choose a site from the list to review and update the information and manually verify its tax region.



Address Not Found

The "Address Not Found" tab shows sites with unlocatable addresses. Select a site from the list to review, update the information, and manually verify its tax region.



Errors

Sites will populate under the Errors tab for system encountered errors during the verification process. Select the site to open the Edit Site screen and manually verify the Tax Region.

