

Configure Centralized Tax Profiles

Introduction

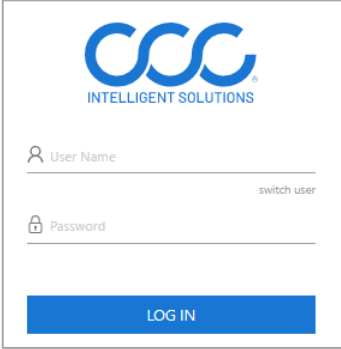
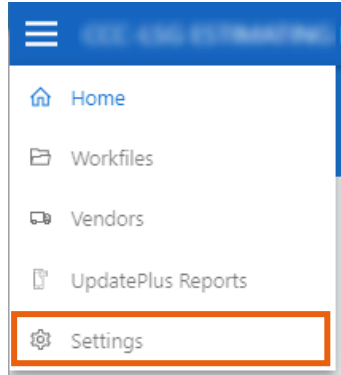
This Job Aid discusses how to configure tax profiles in **cccone.com**. The tax profile configuration page allows you to manage your tax profiles to:

- Search Profiles
- View Profiles
- Edit Tax Profiles
- Create Profiles
- Delete Profiles

Important: Once a location is assigned to a tax profile in cccone.com the tax profile will be disabled in CCC ONE desktop. All configuration for that location must then be completed on cccone.com.

Access Configuration Settings

Follow the steps in the table below to access the settings page, then complete the steps in each scenario on the pages below to complete that task:

Step	Action
1	Login to cccone.com with your username and password . 
2	Click the menu icon .
3	Then click Settings , the settings page opens. 

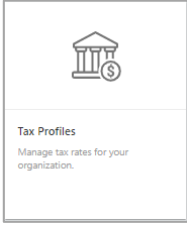
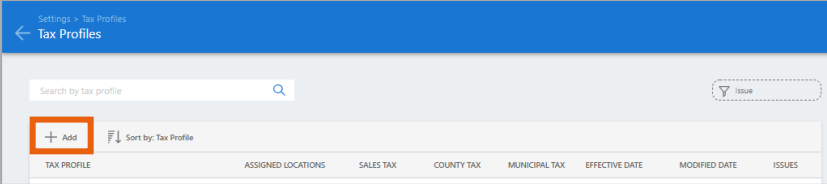
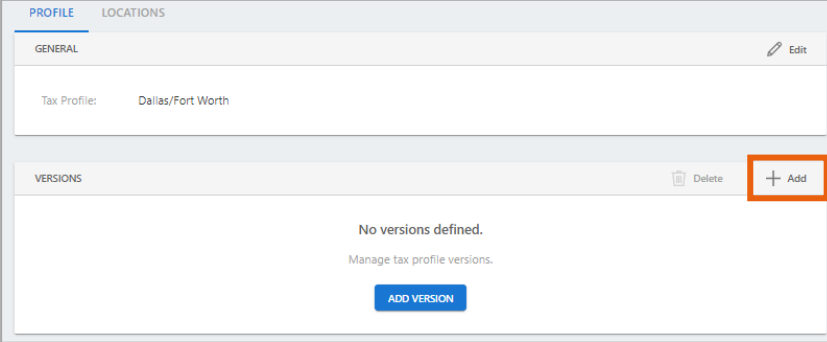
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Configure Centralized Tax Profiles, Continued

Create Tax Profiles

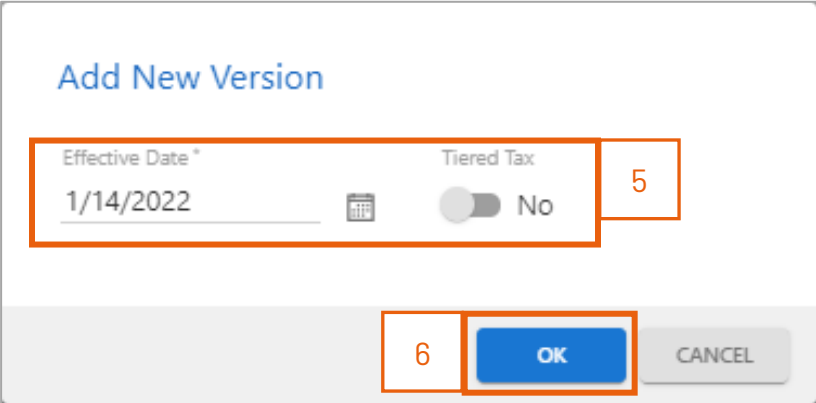
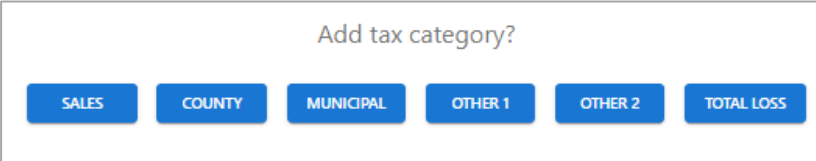
Follow the steps in the table below to create a tax profile:

Step	Action
1	<p>Click the Tax Profiles tile, the Tax Profiles page opens.</p> 
2	<p>Click Add, the Add Tax Profiles popup opens.</p> 
3	<p>Enter a Tax Profile name and click OK. The Edit Tax Profile screen opens.</p> 
4	<p>Click Add from the Versions section, the Add New Version popup opens.</p> 

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Configure Centralized Tax Profiles, Continued

Create Tax Profiles, continued

Step	Action
5	<p>Enter or Select the date you would like the tax to go into effect. Use the slider to indicate if it is a Tiered Tax.</p> <p>Note: Enter as many Tax Profile versions as needed. Only one tax version will be in effect a time.</p>
6	<p>Click OK.</p> 
7	<p>Select a Tax Category.</p> 

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Configure Centralized Tax Profiles, Continued

Create Tax Profiles, continued

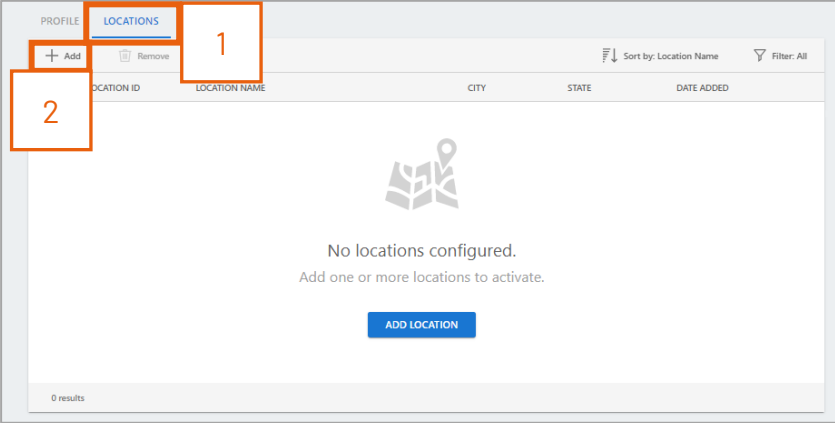
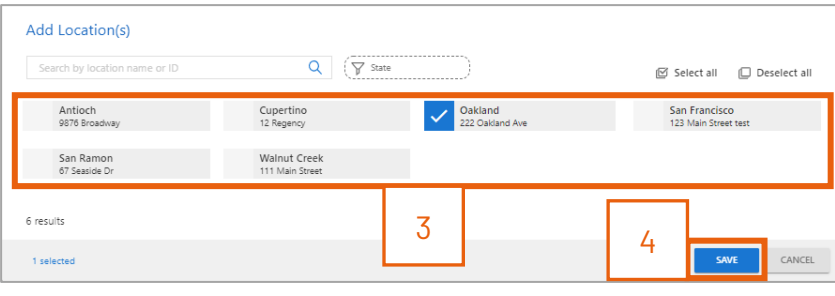
Step	Action
8	Enter a tax Rate percentage.
9	Select items from the Taxability groups to apply to that tax category.
10	Click Save when complete. The tax category is now added and will display in the Profile page. Repeat steps 7-9 as needed for each tax category that you want to add.

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Configure Centralized Tax Profiles, Continued

Add Location to Tax Profile

Follow the steps below to add a location(s) to a tax profile:

Step	Action
1	Select the Locations tab from the Edit Tax Profile page.
2	Click Add , the Add Location(s) popup opens. 
3	Select the location(s) you would like to add to the tax profile. Note: You can use the search field to search by location name or ID. You can also filter by state. Additionally, you can use the Select all or Deselect all options to select/deselect all the location being displayed.
4	Click Save . The location will now display in the list of locations. 

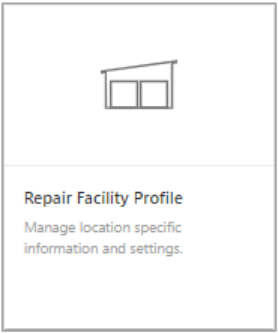
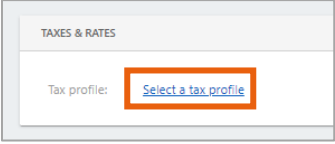
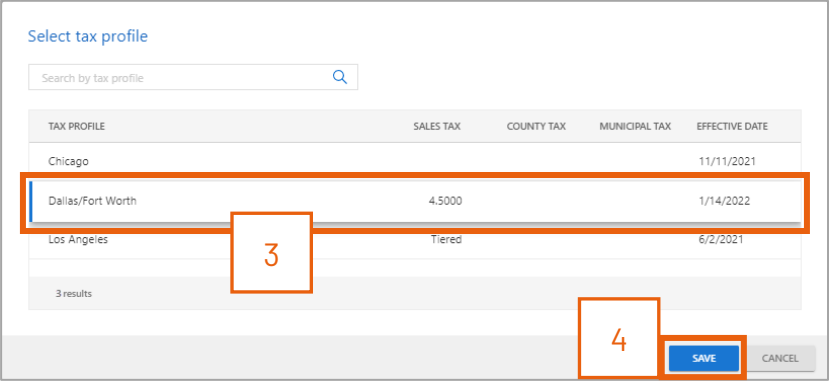
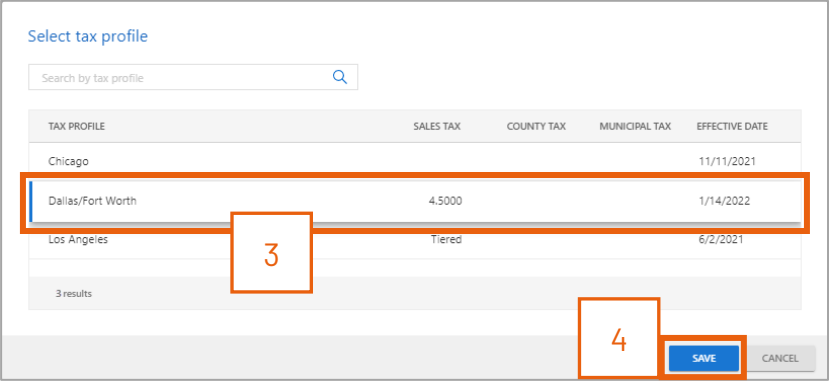
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Add Tax Profile to Location

Follow the steps below to add a tax profile to a location that does not have a tax profile assigned using the Repair Facility Profile tile:

Note: A tax profile must already be created.

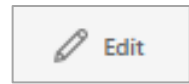
Step	Action
1	Select the Repair Facility Profile tile, the Repair Facility Profile page opens. 
2	Click the Select a tax profile link in the rates section, the select tax profile popup opens. 
3	Select the Tax Profile you want to use for that location. Note: If there are multiple results you can use the search field to search by the tax profile name. 
4	Click Save , you are returned to the Repair Facility Profile page. The Rate Profile now displays in the Rates section. 

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Configure Centralized Tax Profiles, Continued

Add Tax Profile to Location

Click the **Edit** icon to make changes throughout cccone.com when available. Click the **Delete** icon to remove sections when available.



Issues

The tax profiles issues are flagged on the Tax Profile page.

Filter the issues by:

- **No Location assigned**
- **No tax category assigned**
- **No version defined**

Add the missing information to remove the issue's flag.

