New/Updated Fields

Scope – set, user supplied

- One or more of the set { Federal, State, County, Local }

Exempt Nonbillable – flag, user supplied

- True – nonbillable taxes can be exempted
- False – nonbillable taxes can be exempted

Domain – discrete, user supplied

- Defines the level the taxing jurisdiction must match exemption jurisdiction
- One of the set { Federal, State, County, Local }
- Does not need to correlate to the tax level of the tax being exempted

Force Level Exemptible - flag, user supplied
- True (Default) - Tax type wildcard exemptions will exempt taxes tagged not level exemptible
- False - Tax type wildcard exemptions will exclude taxes tagged not level exemptible from consideration

Legacy Fields

- Jurisdiction
- Tax Type (short)
- Tax Level (Tax Type only) – Deprecated, use scope and domain instead

All fields are used, therefore defaults when not supplied will be important to document.

Tax Type defaults (where applicable)

Field	Default	Special Condition
Include	True	Valid tax type specified
Nonbillable	False	Wildcard for tax type used
Scope	Tax Level or Domain	Tax Level or Domain
Domain	Tax Level	One or the other is required
		Domain overrides tax level if both are provided
Force Lvl Exempt	True	Wildcard for tax type used

Category defaults (where applicable)

Field	Default	Special Condition
Include Nonbillable	False	
Scope	State+County+City	If State or lower level jurisdiction
	All	If Country level jurisdiction
Domain	State	If State or lower level jurisdiction
	Federal	If Country level jurisdiction

For V2 REST API, numeric representations are required for Scope. For SaaS Standard, numeric values are optional.

Scope	Description
128	Federal
256	State
512	County
1024	Local

To get combinations, add up the numeric values

Examples

Scope	Description
1920	All (Federal+State+County+Local)
1792	State+County+Local
384	Federal+State

Exemption Field names by Service

Field	REST V2	SaaS Standard
Tax Type	tpe	TaxType
Category	cat	TaxCategory
Tax Level	lvl	TaxLevel
Jurisdiction	loc (Object)	Location Object (multiple columns – no change)
Exempt Nonbillable	exnb	ExemptNB
Scope	scp	Scope
Domain	dom	Domain
Force – Exempt Level	frc	ExemptLvl

Scenarios for usage of scope

Scenario 001 - apply exemption to all cities within a state - billable only

Client wants all tax categories of type 1 (Sales) exempt at local level for the state of Colorado (billable only).

Scope local will exempt only local taxes. Domain state will match jurisdiction at the state level (CO). Non-billable taxes will be excluded from consideration.

Type	Id	Jurisdiction	Scope	ExNB	Domain	ExLvl
Category	1	USA, CO, Boulder, Boulder	1024 (Local)	false	1 (State)	n/a

Scenario 002 - apply exemption to all states, counties and cities within a country - include non-billable

Client wants all tax categories of type 5 (Connectivity Charges) exempt at state, county and local level for all states in the USA, billable or non-billable.

Scope will exempt State, County and Local taxes. Domain Federal will match jurisdiction at the Federal level (USA). Non-billable taxes will be subject to exemption.

Type	Id	Jurisdiction	Scope	NBA	Domain	ExLvl	
Category	5	USA, TX	1792 (State+County+Local)	true	0 (Federal)	n/a	

Scenario 003 - apply multiple exemptions to all locations within a state

Client wants billable Sales tax (1) and Use tax (49) exempt at state, county and city level for Washington.

Scope will exempt State, County and Local taxes. Domain State will match jurisdiction at the State level (WA).

Type	Id	Jurisdiction	Scope	NBA	Domain	ExLvl
Tax Type	1	USA, WA	1792 (State+County+Local)	*false	1 (State)	n/a
Tax Type	49	USA, WA	1792 (State+County+Local)	*false	1 (State)	n/a

*Does not apply

Scenario 004 - exempt Federal tax only if taxing jurisdiction is within a state

Client wants FUSF tax (18) exempt at Federal level but only if transaction is in Puerto Rico.

Scope will exempt Federal taxes. Domain State will match jurisdiction at the State level (PR).

Type	Id	Jurisdiction	Scope	NBA	Domain	ExLvl
Tax Type	18	USA, PR	128 (Federal)	*false	1 (State)	n/a

*Does not apply

Scenario 005 - exempt all taxes at Federal level except non-level exemptible

Client wants all Federal taxes exempt at Federal level except those marked non-level exemptible.

Scope will exempt Federal taxes. Domain will match at Federal level. Non-billable will be included.

Taxes which are not level exemptible will be excluded from consideration.

Type	Id	Jurisdiction	Scope	NBA	Domain	ExLvl
Tax Type	0	USA, PR	128 (Federal)	true	0 (Federal)	false