Customer Tax Handling (Capability)

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1. Role Definition



There are different tax tracking and reporting obligations for products and services in different locations and jurisdictions. This service domain handles the consolidation and reporting of tax related activity as necessary for a customer. Note that this service domain is only responsible for the consolidation and reporting of tax related activity - other service domains will be required to handle actual tax processing obligations as may apply for certain products and services

2. Example of Use



A consumer customer is provided with a year end tax report for products and services provided by the bank

3. Executive Summary



This service domain handles consumer tax reporting obligations including the consolidation and reporting of customer tax related financial activity

4. Key Features



Maintain the customer tax reporting obligations

ServiceDomain

Consolidate product/service tax related activity/transaction details

Analyse financial activity and assemble customer tax reports

Documentation

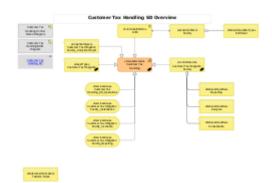


Properties		
Property	Value	
Service Doma	ain	
API BIAN Portal	Customer Tax Handling API (https://app.swaggerhub.com/apis/BIAN-3/CustomerTaxHandling/12.0.0)	
Core Business Object	Customer Tax Report (object_26.html?object=37108)	
Individual Analytics	customerTaxObligationFulfillmentArrangementAccumulators customerTaxObligationFulfillmentArrangementActivityAnalysis customerTaxObligationFulfillmentArrangementPerformanceAnalysis customerTaxObligationFulfillmentArrangementTrends&Events	
Portfolio Analytics	customerTaxObligationFulfillmentArrangementPortfolioActivityAnalysis customerTaxObligationFulfillmentArrangementPortfolioMake-UpAnalysis customerTaxObligationFulfillmentArrangementPortfolioPerformanceAnalysis	
Scenarios	Create Customer Reports (views/view_55419.html)	
Service Role	Handle the consumer tax reporting obligations	
BIAN Life Cyc	cle	
Registration Status	Registered	
Stereotypes		
stereotype		

Appears on



(views/view_51303.html)



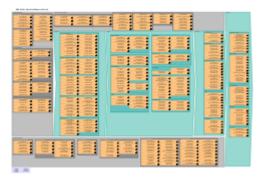
Customer Tax Handling SD Overview

(views/view_51891.html)



BIAN Service Landscape V12.0 Matrix Vi...

(views/view_51705.html)



BIAN Service Landscape V12.0 Value Ch...

Relations



aggregated by Consumer Services (object_25.html?object=130111)

Wave 2 (object_25.html?object=153742)

Accounting Services (object_25.html?object=171791)

gets input from Customer Relationship Management (object_21.html?object=30437)

Fiduciary Agreement (object_22.html?object=46792)

Investment Portfolio Planning (object_23.html?object=48534)

is equal to Customer Tax Handling (object_37.html?object=35885)

is part of Consumer Services (object_25.html?object=130111)

realized by	Customer Tax Obligation Facility_ Analytics Object (object_25.html?object=111305) Customer Tax Obligation Facility_Invocation (object_17.html?object=170465) Customer Tax Handling_SD_Operations (object_17.html?object=170468) Customer Tax Obligation Facility_Instantiation (object_17.html?object=170484) Customer Tax Obligation Facility_Reporting (object_17.html?object=170493) Customer Tax Handling_SD_Service Group (object_19.html?object=241470) Ex CR Automated execution tax reporting (object_13.html?object=31531) Rq CR Request for specific or ad-hoc tax reporting (object_13.html?object=31981) Up CR Update details of the customer tax handling facility (object_12.html?object=33265) Re CR Retrieve details relating to the customer tax handling (object_14.html?object=34649) In CR Initiate customer tax handling (object_14.html?object=35476) Re BQ Retrieve details about the customer tax reporting (object_15.html?object=38987) Up CR Update consolidated product reports (object_15.html?object=39014) Ec BQ Accept or verify the tax reporting position analysis (object_15.html?object=39860) Customer Tax Obligation (object_24.html?object=40864) Up BQ Update aspects of the tax handling analysis (object_12.html?object=42229) Re CR Retrieve details about the consolidated reports used for tax reporting (object_16.html?object=44789) Customer Tax Obligation Facility (object_24.html?object=45465) Re BQ Retrieve details about the tax reporting analysis (object_16.html?object=45688) Co CR Control the processing of the customer's tax handling (e.g. suspend) (object_16.html?object=46388) Up BQ Update customer tax reporting details (object_16.html?object=47135)
	UD i uiiii (object_26.iitiii ?object=36132)
serves	Customer Management (object_6.html?object=126743)
triggered by	Servicing Order (object_21.html?object=32295)