



NETSUITE SUITETAX ENGINE SETUP GUIDE

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PURPOSE STATEMENT

This document provides an overview of the NetSuite next generation tax functionality, SuiteTax, which will ultimately replace the native legacy tax engine. This document is intended to guide you through the set-up process, both for new customers and customers upgrading from Legacy Tax to SuiteTax.

DISCLAIMER

This document is for informational purposes only and is intended solely to assist you in planning for the implementation and upgrade of the product features described. It is not a commitment to deliver any material, code, or functionality, and should not be relied upon in making purchasing decisions.

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INTRODUCTION

This document outlines the process for accessing and configuring the SuiteTax feature and SuiteTax Engine. This document only applies to the NetSuite's native tax engine that supports US sales tax and International VAT. It does not cover anything related to our SDN partner tax engines (Anrok, Avalara, Sovos, Thomson Reuters, Vertex, Wolters Kluwer) nor NetSuite India, and Latam (Brazil, Colombia) tax engines. The India and Latam tax engines are separate documents that you can find on the User Guides section in the Help Center.

The screenshots in this document are from a demo environment and may vary from actual production accounts. Any information in this document may be subject to future changes.

Important Notes:

- SuiteTax is a non-reversible feature. Once enabled, it can no longer be disabled or reversed.
- SuiteTax cannot be used alongside the Legacy Tax environment in the same account. An account can hold either SuiteTax or Legacy Tax, not both at the same time. This is because tax codes, the tax logic, transaction forms etc. are different in SuiteTax.
- SuiteTax applies to all subsidiaries within the same NetSuite account. An account cannot have subsidiaries running in Legacy and SuiteTax at the same time.
- SuiteTax is not compatible with certain NetSuite features, preferences, and partner SuiteApps. Make sure to review the list of [SuiteTax Known Limitations](#) to determine if the functionality can be used or not. (SuiteAnswers ID: **64724**)
- NetSuite strongly recommends configuration and testing SuiteTax in a sandbox account first. Move to production once testing confirms results that you expect.



SUITETAX OVERVIEW AND BENEFITS

SuiteTax, NetSuite's next-generation tax environment, introduces the new SuiteTax API that processes the tax determination and calculation rules defined by tax engines (native NetSuite as well as SDN tax partner engines). A tax engine represents an implementation of the Tax plug-in feature. The plug-in implementation defines the process by which the tax engine calculates taxes on a transaction.

SuiteTax provides greater flexibility to support specific country needs and legislation changes regarding tax calculation and reporting. SuiteTax helps you manage in-country transactions (Sales Tax, VAT, Withholding Tax), and numerous special tax situations and rules, such as intra-EU transactions, reverse charges, EU One Stop Shop and others.

SuiteTax also lets you use different tax calculation engines for nexuses and override tax details on transactions. This will enable users to comply with different tax requirements across the globe.

Key Benefits

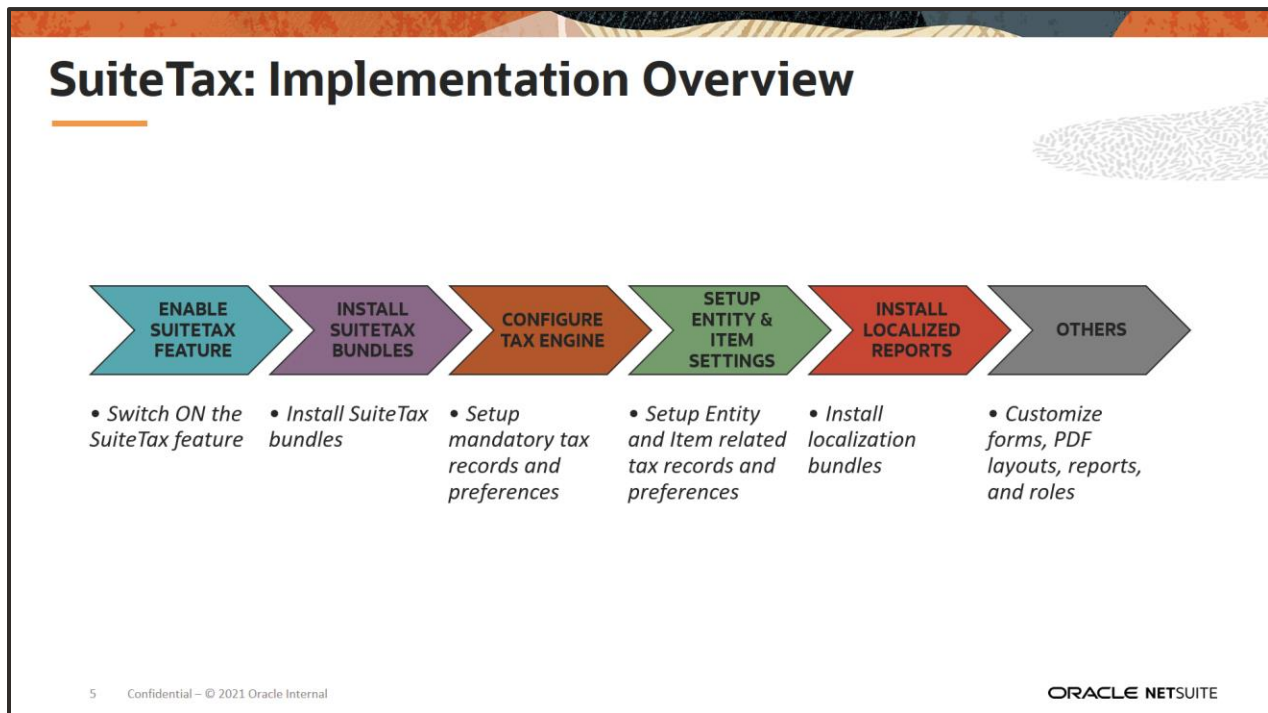
- Single platform delivering Sales Tax, Value Added Tax, and Withholding Tax
- Multiple tax partner solutions to choose from
- Option to set up multiple tax registrations for subsidiary and entity records
- Monthly automated tax rate updates for over 100 countries powered by CCH® SureTax® from Wolters Kluwer
- Enhanced nexus determination logic that considers Shipped To and Shipped From addresses including location field

Key Features

- USA zip +4 tax determination
- USA Exemption Certificate management and item taxability rules
- EU VAT ID with address validation plus format validation for 20+ non-EU countries
- Number of country specific bundles/SuiteApps that include VAT returns with editable templates
- Additional date field on all taxable transactions, Tax Point Date, that drives the tax reporting

IMPLEMENTATION OVERVIEW

Below is an outline on what to expect during a SuiteTax implementation using the NetSuite SuiteTax Engine. **Once you've completed the implementation, you need to go to the SuiteTax Migration page to confirm that the SuiteTax setup is complete.**



| ENABLE SUITETAX FEATURE | INSTALL SUITETAX BUNDLES | CONFIGURE TAX ENGINE | SETUP ENTITY & ITEM SETTINGS | INSTALL LOCALIZED REPORTS | OTHERS |
|---|--|---|---|---|--|
| - Switch ON the SuiteTax feature | - Install applicable tax engine bundles - Enable tax engine plug-in | - Create Nexuses - Assign Subsidiary Tax Registrations - Create Custom Tax Types, Tax Codes, and Tax Groups (if needed) | - Assign customer and vendor tax registrations - Set Item Tax Types - Create Tax Schedules - Create US Exemption Certificates - Create Non-Taxability Rules | - Install applicable Country Tax Reports and/or Localization bundles (including prerequisite Tax Reporting Framework) | - Customize transaction forms - Customize transaction PDF layouts - Customize reports - Customize roles |

ENABLE SUITETAX FEATURE

SuiteTax Prerequisites

Before enabling the SuiteTax feature, make sure you review the list of SuiteTax' incompatible features, preferences, and bundles/suiteapps. The list is updated frequently. **SuiteTax is a non-reversible feature. Once you enable it, it can no longer be disabled. There will be no way for the account to go back to Legacy Tax in a production account.** Sandbox refresh will revert to legacy, if production is in legacy state.

SuiteTax Enablement

Enable the SuiteTax feature by navigating to *Setup > Company > Enable Features > Tax > SuiteTax*.

Enable Features More

[Save](#) [Cancel](#) [Reset](#)

Subsidiary Feature: After enabling this feature, you must enable and set preferences for individual subsidiaries using the [Subsidiary Settings Manager](#).

[Company](#) [Accounting](#) [Tax](#) [Transactions](#) [Items & Inventory](#) [Employees](#) [CRM](#) [Analytics](#) [Web Presence](#) [SuiteCloud](#)

Tax & Compliance

☒ **ADVANCED TAXES**
TRACK TAXES FOR MULTIPLE NEXUSES, AND USE TAX SCHEDULES TO DETERMINE THE TAX TREATMENT OF ITEMS SOLD IN EACH NEXUS.

☐ **EU MINI ONE STOP SHOP**
TRACK TAXES FOR EU DIGITAL SERVICES

☒ **SUITETAX**
DEFINE DIFFERENT TAX MECHANISMS FOR DIFFERENT TAX JURISDICTIONS. VISUALIZE TAX DETAILS ON EACH TRANSACTION. THIS FEATURE REQUIRES INSTALLATION OF THE TAX UTILITY PLUG-IN (SUITETAX ENGINE, OR PARTNER TOOLS, OR COMBINATIONS).

Migration from Legacy to SuiteTax – Records and Transactions

When the SuiteTax feature is enabled, the migration of tax-related records proceeds in the background. SuiteTax changes most of the tax-related records across NetSuite but values on transactions are not changed and the GL impact is preserved. To understand the changes on NetSuite records and how existing tax information on legacy records are migrated to SuiteTax, refer to [Migration of Legacy Records and Transactions to SuiteTax](#).

Note that the records migration and tax setup need to be completed before you can create transactions. All taxable transactions are initially locked for creation and editing after enabling SuiteTax. You need to complete the following required steps before you can create and edit taxable transactions:

- On the Subsidiary page select the tax engine you intend to use for each nexus. If you do not require taxes for a particular nexus, mark it as tax-exempt.
- On the SuiteTax Migration page, confirm that the SuiteTax setup is complete.

Confirmation of SuiteTax Setup

Once you've completed the tax configuration, navigate to *Setup > Tax > SuiteTax Migration* > click the **Confirm SuiteTax Setup** button.

On the Confirm SuiteTax Setup page, a list of warnings is shown if the system found any inaccuracies in the SuiteTax setup. When the warnings have been addressed, check the SuiteTax Setup Completed box at the bottom of the page to confirm the setup, then click Save.

Confirm SuiteTax Setup

SaveCancel

Check the box at the bottom of the page to confirm that you have completed all setup tasks listed in the SuiteTax migration guide.

Taxable transactions will be available for creation and editing after this step.

☒ SUITETAX SETUP COMPLETED *

SuiteTax Migration

Setup Status

SuiteTax setup completed. Taxable transactions are available for creation and editing.

Transactions Migration Status

All taxable transactions on or after 2/26/2020 are successfully migrated.
For more information about the migration background process, go to *Setup > Company > Bulk Processing Status List*.

Migration Process Log

| SEVERITY | DATE ▼ | MESSAGE |
|----------|--------------------|--|
| INFO | 08/01/2020 7:23 am | SuiteTax setup was confirmed. |
| INFO | 28/12/2019 7:17 am | Successfully migrated Tax Codes and Tax Types. |
| INFO | 28/12/2019 7:17 am | Successfully migrated tax-related records. |
| INFO | 28/12/2019 7:17 am | Successfully migrated Entities. |
| INFO | 28/12/2019 7:17 am | Successfully created Subsidiary Tax Registrations. |
| INFO | 28/12/2019 7:17 am | Successfully migrated Nexuses. |

Roles and Permissions in SuiteTax

When you enable the SuiteTax feature, the **Tax Engine** role is added to your account. This role is set up with all the required permissions and can be used as a template for creating customized roles.

You should set up your tax engine plug-in implementations to run under the standard **Tax Engine** role. When using a customized version of this role, you should consult your tax engine provider regarding your customizations.

To view the default permissions assigned to the **Tax Engine** role, go to *Setup > Users/Roles > User Management > Manage Roles* and click the link for the **Tax Engine** role.

SuiteTax also adds the following tax-related permissions to NetSuite standard roles, including the Tax Engine role.

| PERMISSION SUBTAB | SUITETAX PERMISSION | USAGE | DEFAULT PERMISSION LEVEL ON TAX ENGINE ROLE | MINIMUM PERMISSION LEVEL |
|-------------------|-----------------------------------|--|---|---|
| Lists | Tax Details Tab | View and edit tax information on the Tax Details subtab on transactions. | Full | Edit – To be able to override the nexus, tax registration number, and tax details on transactions. |
| | Subsidiary – Tax Engine Selection | View and edit the tax registration details on the Tax Registrations subtab on subsidiary records. | Full | Edit – To be able to assign tax registrations and tax engines when editing subsidiary records. |
| | | | | Note: You must also have at least the Edit level of the Subsidiaries permission to edit a subsidiary record and select a tax engine. |
| Reports | Tax Reports | View tax reports. | View | View |

INSTALL SUITETAX BUNDLES

IMPORTANT NOTE: This and the succeeding sections only apply if you are implementing SuiteTax using the NetSuite SuiteTax Engine.

- If your customer is using a partner tax engine (Avalara, Anrok, Wolters Kluwer, Thomson Reuters, Sovos, Vertex), you only need to make sure that the SuiteTax feature is enabled. The configuration of the partner tax engine is the responsibility of the tax partner or any third party consultants that the company has contracted with.
- If your customer is using a combination of NetSuite and a partner tax engine, this and the succeeding sections apply, BUT only limited to the applicable regional setups. For example, if the customer plans to use Avalara for the US and the NetSuite SuiteTax Engine for EU Countries, then Non-Taxability Rules and US Exemption Certificates should not be created. Tax Schedules, on the other hand, must be configured.
- If your customer is using the NetSuite India Tax Engine reach out to **Venkata Kottapalli** (venkata.kottapalli@oracle.com) for suitability, setup and configuration, and any localization questions. This and the succeeding sections do not apply to India.
- If your customer is using the Brazil or Latam tax engine, send an email to the Latam provisioning team (nsgbu_lataml10nprovisioning_grp@oracle.com) for suitability, setup and configuration, and any localization questions. This and the succeeding sections do not apply to Brazil.

Bundle Prerequisites

If you are planning to use the NetSuite SuiteTax Engine, enable the following features under *Setup > Company > Enable Features > SuiteCloud*. Some or all of these features may already be enabled as part of the SuiteSuccess Deployment process.

1. Item Options
2. Custom Records
3. Advanced PDF/HTML Templates
4. SuiteFlow

Company
Accounting
Tax
Transactions
Items & Inventory
Employees
CRM
Analytics
Web Presence
SuiteCloud

VIEW SUITECLOUD [TERMS OF SERVICE](#).

SuiteBuilder

☒ ITEM OPTIONS
ASSIGN CUSTOM TRANSACTION ITEM OPTION FIELDS TO THE LINE ITEMS OF YOUR TRANSACTION RECORDS. BY ENABLING THIS FEATURE, YOU AGREE TO [SUITECLOUD TERMS OF SERVICE](#).

☒ CUSTOM RECORDS
COLLECT INFORMATION SPECIFIC TO YOUR BUSINESS THAT CAN BE INTEGRATED WITH STANDARD NETSUITE RECORDS. BY ENABLING THIS FEATURE, YOU AGREE TO [SUITECLOUD TERMS OF SERVICE](#).

☒ ADVANCED PDF/HTML TEMPLATES
ENABLE POWERFUL, TEMPLATE-BASED RENDERING OF SELECTED TRANSACTIONS. BY ENABLING THIS FEATURE, YOU AGREE TO [SUITECLOUD TERMS OF SERVICE](#).

SuiteFlow

☒ SUITEFLOW
AUTOMATE BUSINESS PROCESSES WITHOUT WRITING A LINE OF CODE USING VISUAL WORKFLOW MANAGEMENT BUILT ON THE POWER OF SUITESCRIPT. BY ENABLING THIS FEATURE, YOU AGREE TO [SUITECLOUD TERMS OF SERVICE](#).

Bundle Installation

You should install the bundles in the following priority order. Navigate to *Customization > SuiteBundler > Search and Install Bundles*.

| PRIORITY ORDER | BUNDLE | KEYWORD | BUNDLE ID | DESCRIPTION |
|----------------|-------------------------|-------------------------|-----------|--|
| 1 | SuiteTax Engine | SuiteTax Engine | 237702 | This bundle automatically provides tax records, validates tax registration numbers, and determines taxes for US Sales Tax and VAT Countries. |
| 2 | SuiteTax Data Records | SuiteTax Records | 239499 | This bundle contains global tax rate tables, tax agencies, and tax codes. |
| 3 | Tax Reporting Framework | Tax Reporting Framework | 237699 | This bundle provides the tax reporting framework for all NetSuite SuiteTax and Localization bundles/SuiteApps. This bundle also contains tax related roles and permissions |

| Installed Bundles | | | | | | | | | | | |
|---|-------------------------|-----------|---------|---------|---|---------------------|--------|---|--------------|----------------|--|
| New Refresh | | | | | | | | | | | |
| ACTION | NAME | BUNDLE ID | VERSION | MANAGED | ABSTRACT | ADMIN DOCUMENTATION | STATUS | OWNER | PUBLISHER | INSTALLED FROM | |
| | SuiteTax Engine | 237702 | 2.00.8 | Yes | This SuiteApp includes the rules and tax calculation for VAT/GST countries as well as US sales tax. It also provides tax registration number and address validation for EU member countries and numeric format validation for a further 20 countries. Before installing the SuiteTax Engine, ensure that the SuiteTax feature is enabled in your account. | | ✓ | NetSuite ERP Tax Platform - SuiteTax Engine (4824246) (4824246) | com.netsuite | Production | |
| | SuiteTax Data Records | 239499 | 2.00.14 | Yes | This SuiteApp includes tax data for over 100 countries, including the United States. Before installing SuiteTax Data Records, ensure that the SuiteTax Engine is installed in your account. | | ✓ | NetSuite ERP Tax Platform - SuiteTax Data Records (5108699) (5108699) | com.netsuite | Production | |
| | Tax Reporting Framework | 237699 | 1.00.0 | Yes | Provides the tax reporting framework for all NetSuite SuiteTax and Localization SuiteApps. | | ✓ | NetSuite Platform Solutions Group - Tax Reporting Framework (5170090) | com.netsuite | Production | |

Manage Plug-in

To use the NetSuite SuiteTax Engine, the plug-in implementation must be enabled first.

1. Navigate to *Customization > Plug-Ins > Manage Plug-Ins*.
2. On the Manage Plug-in implementations page, check the **SuiteTax Engine**.
3. Click **Save**.

Manage Plug-In Implementations

[Save](#)
[Cancel](#)

Tax Calculation

IMPLEMENTATIONS

☒ SUITETAX ENGINE

CONFIGURE SUITETAX ENGINE

Assigning Subsidiary Tax Registrations

Existing/Migrated Subsidiaries

For NetSuite accounts migrated from Legacy Tax to SuiteTax, all nexuses previously entered under the Nexus tab are migrated to the new Tax Registration tab. Once all nexuses are migrated, assign the tax registration details. Below are the steps to assign subsidiary tax registrations:

1. Go to Setup > Company > Subsidiaries.
2. Click the **Edit** link next to the subsidiary that you want to edit.
3. On the subsidiary record, click the **Tax Registrations** subtab.
4. Click on the Tax Registration line you want to update.
5. Enter or update **Tax Reg. Number**.

6. Click the **Tax Engine** dropdown list and select a tax engine for the nexus. The list shows the tax engine implementations that have been added and activated in your account.
Note: If you do not require taxes for a particular nexus, you can skip tax engine selection and mark it as **Tax-Exempt**.
7. Click **OK**.
8. Repeat Steps 4 through 7 for each nexus.
9. Click **Save**.

Repeat this procedure for each migrated subsidiary record.

Once you save the subsidiary record, you should see a green banner on top stating that the Data Provisioning is in process. You can click the link to check on the status. You will also receive an email confirming that the process has been completed. Data Provisioning is the process where the SuiteTax Engine creates the tax-related records such as Tax Types, Tax Codes, Tax Accounts, and Tax Agencies.

⌚ ★ 🏠
Activities Transactions Lists Reports Analytics Documents
Setu

Confirmation

Data Provisioning is in process.
Click to view the [Data Provisioning Status](#).

| <div>Refresh</div> <div>FILTERS</div> <div> <div>DATE</div> <div>FROM</div> <div>TO</div> <div>SCRIPT</div> <div>DEPLOYMENT ID</div> </div> <div> <div>STATUS</div> <div>SHOW INACTIVES</div> </div> | | | | | | | | | | |
|--|--|-----------------------|-----------------------|-----------------------|----------|-------|----------|-------------|---------|--------|
| <div>1/26/2020 — 1/19/2020</div> <div>TOTAL: 85</div> | | | | | | | | | | |
| SCRIPT | DEPLOYMENT ID | DATE CREATED | START DATE | END DATE | STATUS | STAGE | PRIORITY | CONCURRENCY | DETAILS | CANCEL |
| STE MR Confirmation Email | customdeploy_ste_mr_confirmation_email | 1/26/2020 10:34:56 pm | 1/26/2020 10:34:56 pm | 1/26/2020 10:34:59 pm | Complete | | Standard | 1 | Details | |
| STE MR Data Provisioning | customdeploy_ste_data_provisioning2 | 1/26/2020 10:34:46 pm | 1/26/2020 10:34:46 pm | 1/26/2020 10:34:56 pm | Complete | | Standard | 1 | Details | |
| STE MR Data Provisioning | customdeploy_ste_data_provisioning | 1/26/2020 10:34:40 pm | 1/26/2020 10:34:40 pm | 1/26/2020 10:34:46 pm | Complete | | Standard | 1 | Details | |
| STE MR Data Provisioning | customdeploy_ste_data_provisioning2 | 1/26/2020 10:34:18 pm | 1/26/2020 10:34:19 pm | 1/26/2020 10:34:40 pm | Complete | | Standard | 1 | Details | |
| STE MR Data Provisioning | customdeploy_ste_data_provisioning | 1/26/2020 10:33:52 pm | 1/26/2020 10:33:52 pm | 1/26/2020 10:34:19 pm | Complete | | Standard | 1 | Details | |
| STE MR Data Provisioning | customdeploy_ste_data_provisioning2 | 1/26/2020 10:33:46 pm | 1/26/2020 10:33:47 pm | 1/26/2020 10:33:52 pm | Complete | | Standard | 1 | Details | |

Thank you for using the SuiteTax Engine.
The Tax Records have been created in your account for the following nexuses:

- Spain

Sincerely
Your NetSuite Staff

NOTE: The options available under the Tax Engine column depends upon the tax engines installed in your NetSuite account. If the account is using both NetSuite and partner tax engines, you will see those tax engines available on the drop-down. You need to make sure you are selecting the correct tax engine for each nexus. **If you leave the Tax Engine column empty, tax records provisioning, tax determination, and tax calculation will not be possible.**

New Subsidiaries and New Tax Registrations

Tax Registrations can be added after enabling the SuiteTax feature. You can add new Tax Registrations lines on new and existing. Note that the Tax Registrations tab will only be available after saving the new subsidiary record.

Subsidiary Edit Back Actions ▾

☐ SUBSIDIARY IS INACTIVE

NAME
RSG Electronics Corporation

PARENT SUBSIDIARY
RSG Electronics USA

☐ ALWAYS DISPLAY SUBSIDIARY NAME

SUBSIDIARY LOGO (FORMS)

SUBSIDIARY LOGO (PAGES)

WEB SITE

DOCUMENT NUMBER PREFIX

STATE/PROVINCE

COUNTRY
Philippines

LEGAL NAME

RETURN EMAIL ADDRESS

FAX

☐ ELIMINATION

LANGUAGE
English (U.S.)

CURRENCY
Philippine Peso

EDITION
XX

INTERNAL ID
5

Addresses Vendor Bill Matching **Tax Registrations** Preferences Workflow Translation System Notes

| COUNTRY | NEXUS | TAX AGENCY | TAX REG. NUMBER | TAX-EXEMPT | TAX ENGINE | EFFECTIVE FROM | VALID UNTIL |
|-------------|-------------|----------------------------------|-----------------|------------|------------|----------------|-------------|
| Hong Kong | Hong Kong | | | Yes | | 1/1/2023 | |
| Philippines | Philippines | Bureau of Internal Revenue (BIR) | 1234567890123 | | | 1/5/2018 | |

- Once the initial subsidiary setup is done, edit the subsidiary record and add the related Tax Registration or Tax Registrations in case the subsidiary has multiple nexuses/countries.
- Go to the **Tax Registration** subtab.
- Add a new Tax Registration line.
- Select the **Country** and **Nexus**. **Tax Agency** is automatically populated.
- If the Nexus is not yet existing, click **New** and the Nexus setup window pops up.
- If the Nexus is for a particular State/Province/County in the US/Canada, select State/Province/County.
- Select Parent Nexus, if applicable.
- Leave the Tax Agency blank. NetSuite will create and assign the appropriate Tax Agency.
- Click **Save**.

Nexus

Save Reset Cancel

COUNTRY
Spain

STATE/PROVINCE/COUNTY
▼

DESCRIPTION *
Spain

PARENT NEXUS
▼

☐ INACTIVE

☐ USE FULFILLMENT TO MODIFY TAX POINT DATE

TAX AGENCY
▼ +

- Enter Tax Reg. Number.
- Select the **Tax Engine** to use. If you are using the NetSuite Tax Engine, select 'SuiteTax Engine'. If you do not require taxes for a particular nexus, you can skip tax engine selection and mark it as **Tax-Exempt**.
- Enter the **Effective From** date.
- Enter **Valid Until**, only if applicable.
- Click **Add** and add more Tax Registrations, if applicable.
- **Save** the subsidiary record.

| Addresses | Vendor Bill Matching | Tax Registrations | Preferences | Document Numbers | Workflow | Translation | System Notes |
|-----------|----------------------|-------------------|-----------------|------------------|-----------------|------------------|--------------|
| COUNTRY * | NEXUS * | TAX AGENCY | TAX REG. NUMBER | TAX-EXEMPT | TAX ENGINE | EFFECTIVE FROM * | VALID UNTIL |
| Spain | Spain | | ESX1234567X | | SuiteTax Engine | 1/1/2020 | |
| ▼ Add | ✕ Cancel | ➔ Insert | ⌵ Remove | | | | |

Tax-Exempt Nexus (Not Tracking Taxes)

Some businesses do not track and report taxes, because they have either not yet reached the tax threshold or are exempt from paying taxes. In this case, you can skip the tax engine selection on the subsidiary tax registration and mark the nexus as tax-exempt instead. This disables tax calculation as well as tax records provisioning for that nexus.

1. To mark a **new nexus** as tax-exempt:
 - a. Select the Edit mode for the subsidiary.
 - b. Go to the **Tax Registration** subtab.
 - c. Select a country and a nexus.
 - d. Check the **Tax-Exempt** box.
 - e. Click **Save**.

The screenshot shows the 'Subsidiary' form with the 'Tax Registrations' subtab selected. The form includes fields for subsidiary details like Name, Parent Subsidiary, and Country. Below the form is a table of tax registrations. The table has columns for Country, Nexus, Tax Agency, Tax Reg. Number, Tax-Exempt, Tax Engine, and Effective From. The 'Tax-Exempt' column for the Germany entry is checked.

| COUNTRY * | NEXUS * | TAX AGENCY | TAX REG. NUMBER | TAX-EXEMPT | TAX ENGINE | EFFECTIVE FROM * |
|----------------------|----------------------|---------------------------------|-----------------|-------------------------------------|------------|------------------|
| United Arab Emirates | United Arab Emirates | Tax Agency United Arab Emirates | | | | 5/1/2018 |
| United Kingdom | United Kingdom | HM Revenue & Customs (HMRC) | GB835586102 | | | 3/1/2018 |
| Germany | Germany | Bundesministerium der Finanzen | | <input checked="" type="checkbox"/> | | |

If a tax registration is no longer valid for the subsidiary, do not remove the nexus from the subsidiary record. Instead, you should invalidate the registration by specifying a date in the **Valid Until** field for the nexus.

Single Instance Accounts

To assign tax registrations in single instance NetSuite accounts:

- Go to Setup > Company > Company Information.
- Click the **Tax Registrations** subtab.

To add a tax registration:

- Select a **Country**.
- Select a **Nexus**. Only nexuses for the selected country are available in the list. Create a new nexus, if needed.
- The **Tax Agency** field is automatically filled in using the value saved on the nexus record.
- Enter the **Tax Reg. Number** to use for this nexus.

- Select the **Tax Engine** to use for this nexus. The list shows the tax engine implementations that have been added and activated in your account.
- Enter the **Effective From** date.
- Enter **Valid Until**, only if applicable.
- Click **Add** and add more Tax Registrations, if applicable
- Save the Company Information page.

Data Provisioning for Single Instance NetSuite accounts is triggered manually.

- Navigate to Setup > SuiteTax Engine > Tax Engine Data Provisioning.
- Select the appropriate nexus/nexuses.
- Click the Run Data Provisioning button.

Tax Engine Data Provisioning

Run Data Provisioning

| NEXUS ▲ | |
|--------------------------|----------------|
| <input type="checkbox"/> | France |
| <input type="checkbox"/> | Germany |
| <input type="checkbox"/> | Hong Kong |
| <input type="checkbox"/> | Philippines |
| <input type="checkbox"/> | Singapore |
| <input type="checkbox"/> | United Kingdom |

Run Data Provisioning

Create Nexuses, Tax Types, Tax Codes, and Tax Groups

The NetSuite SuiteTax Engine automatically provisions tax records, such as Tax Agencies, Tax Types, Tax Accounts, Tax Codes, and Tax Groups based on the nexuses identified under the subsidiary tax registrations tab.

NOTE: For 3rd party integrations where the customer must align their NetSuite data with another system, you need to create custom tax types, tax codes, or tax groups.

Nexuses

Nexus is a tax jurisdiction or geographic area where customers do business, and which has its own tax regulations. To determine the correct tax rate to apply to transactions, NetSuite needs to know where the customer is registered for tax purposes.

The Nexus record is not automatically provisioned. You must create it manually and assign it on the subsidiary record to initiate the automated provisioning of the relevant tax records. For accounts migrated to SuiteTax, the existing nexuses used under Legacy Tax are carried over to SuiteTax.

To view the list of your current Nexuses, navigate to **Setup > Tax > Nexuses**.

Setup Manager

SEARCH

SETUP TASKS

Company

Accounting

Tax

SuiteTax Migration

Nexuses

Tax Types

Tax Codes

Sales

Site Builder

Import/Export

Users/Roles

Nexuses

VIEW Nexus

Customize View

New Nexus

FILTERS

SHOW INACTIVES

| EDIT VIEW | DESCRIPTION | COUNTRY ▲ | STATE/PROVINCE/COUNTY |
|-------------|------------------|----------------|-----------------------|
| Edit View | France | France | |
| Edit View | Germany | Germany | |
| Edit View | United Kingdom | United Kingdom | |
| Edit View | United States WA | United States | Washington |
| Edit View | United States TX | United States | Texas |
| Edit View | United States PA | United States | Pennsylvania |
| Edit View | United States OR | United States | Oregon |
| Edit View | United States OH | United States | Ohio |
| Edit View | United States NY | United States | New York |
| Edit View | United States NJ | United States | New Jersey |

Nexus-specific preferences and defaults are found under the Nexus record. The NetSuite SuiteTax Engine preferences and default settings differ based on the region/country.

USA:

Nexus

Edit

Back

Actions ▼

COUNTRY

United States

STATE/PROVINCE/COUNTY

New York

DESCRIPTION

United States NY

PARENT NEXUS

☐ INACTIVE

☐ USE FULFILLMENT TO MODIFY TAX POINT DATE

TAX AGENCY

New York Department of Revenue

Nexus Preferences

Non-taxability Rules

System Notes

Tax Registrations Validation Preferences

☐ DISALLOW INVALID ENTITY TAX REGISTRATION NUMBER

Tax Rounding Preferences

TAX ROUNDING METHOD

Round Off

TAX ROUNDING PRECISION

.01 and below

Tax On Discounts

☐ CALCULATE TAX BEFORE DISCOUNT IS APPLIED

| Nexus Preferences Non-taxability Rules System Notes | | |
|---|------------|---------------|
| ITEM NAME/NUMBER | VALID FROM | VALID UNTIL ▲ |
| Wireless Keyboard | 20/01/2020 | 04/02/2020 |
| Ergonomic Keyboard | 20/01/2020 | 04/02/2020 |
| Ergonomic mouse pad | 20/01/2020 | 04/02/2020 |
| Ergoprene Gel Mouse Pad | 20/01/2020 | 04/02/2020 |
| Computer Glove With ergo adjustment | 20/01/2020 | 04/02/2020 |
| Wireless Keyboard & Mouse Combo | 20/01/2020 | 04/02/2020 |
| 42 Piece Tool Kit | | |
| General Repair Tool Kit | | |
| Cell Phone, Tablets, Laptop Repair kit | | |

VAT Countries:

Nexus

Save
Cancel
Reset
Actions

COUNTRY
Germany
STATE/PROVINCE/COUNTY

☒ USE FULFILLMENT TO MODIFY TAX POINT DATE
TAX AGENCY
Bundesministerium der Finanzen

DESCRIPTION *
Germany

PARENT NEXUS

☐ INACTIVE

Nexus Preferences Default Tax Codes/Groups Compliance Text System Notes

Tax Registrations Validation Preferences
☐ DISALLOW INVALID ENTITY TAX REGISTRATION NUMBER

Tax Rounding Preferences

TAX ROUNDING METHOD
Round Off

TAX ROUNDING PRECISION
.01 and below

Tax On Discounts
☐ CALCULATE TAX BEFORE DISCOUNT IS APPLIED

| Nexus Preferences Default Tax Codes/Groups Compliance Text System Notes | | |
|--|------------|------------|
| Define a tax code or tax group for each tax transaction type. These will be used as a default for transactions saved for your nexus. | | |
| TAX TRANSACTION TYPE ▲ | GOODS | SERVICES |
| DOMESTIC SALES | DE_SR ▼ | DE_SR ▼ |
| DOMESTIC PURCHASES | DE_SR ▼ | DE_SR ▼ |
| EXPORTS | DE_ZR ▼ | DE_ZR ▼ |
| IMPORTS | DE_SR_RC ▼ | DE_SR_RC ▼ |
| INTRA-COMMUNITY SALES | DE_RCS ▼ | DE_RCS ▼ |
| INTRA-COMMUNITY PURCHASES | DE_SR_RC ▼ | DE_SR_RC ▼ |

| Nexus Preferences | Default Tax Codes/Groups | Compliance Text | System Notes |
|-------------------------|--------------------------|-----------------|--|
| LANGUAGE | | | INVOICE TEXT ▲ |
| English (International) | | | Customer liable for the tax under the reverse charge mechanism |

To create a Nexus record:

1. Go to Setup > Tax > Nexuses > New.
2. In the **Country** field, select the country this nexus is located in.
3. In the **State/Province/County** field (if applicable), select the state, province, or county that the nexus is located in.

If a state/province/county record does not exist, create a new record at Setup > Company > Setup Tasks > States/Provinces/Counties > New.

4. In the **Description** field, enter text that describes this nexus.
5. If this is a subnexus, select the parent nexus. If this is not a subnexus, leave the **Parent Nexus** field blank. Only nexuses for the selected country are available in the list for the **Parent Nexus** field.
6. When you no longer report taxes in this nexus, or if you set it up in error, check the **Inactive** box.
7. In the **Tax Agency** field, select the name of the tax vendor to whom you submit tax reports and remit payments.

You can set up a vendor as a tax agency in two ways:

- a. By selecting Tax Agency in the Category field on the vendor record.
 - b. By clicking the plus icon (New) next to the Tax Agency field on the nexus record.
8. Click **Save**.

Nexus

Save ▼

Cancel

Reset

COUNTRY *

Spain ▼

STATE/PROVINCE/COUNTY

▼

DESCRIPTION *

Spain

PARENT NEXUS

▼

🔗

☐ INACTIVE

☐ USE FULFILLMENT TO MODIFY TAX POINT DATE

TAX AGENCY

▼

Canada Nexus and Subnexus

In most situations, the nexus is a country because most countries charge tax only at the national level. However, countries such as the US, Canada, India, and Brazil levy taxes at regional or state levels and have independent tax authorities.

For Canada, you will need to create Canada as a nexus first, then the Canadian provinces after. For the Canadian provinces, make sure to select Canada as the parent nexus.

Example of a Parent Nexus and Subnexus for Canada:

| NEXUS FIELDS | PARENT NEXUS | SUBNEXUSES | |
|-----------------------|--------------|------------------|------------------|
| Description | Canada | Canada - Alberta | Canada - Ontario |
| Country | Canada | Canada | Canada |
| State/Province/County | (blank) | Alberta | Ontario |
| Parent Nexus | (blank) | Canada | Canada |

To create Canada as a parent nexus:

1. Go to Setup > Tax > Nexuses > New.
2. In the **Country** field, select the Canada.
3. Leave the **State/Province/County** field blank.
4. In the **Description** field, enter text that describes this nexus.
5. Leave the **Parent Nexus** field blank.
6. When you no longer report taxes in this nexus, or if you set it up in error, check the **Inactive** box.
7. In the **Tax Agency** field, select the name of the tax vendor to whom you submit tax reports and remit payments.
 - You can set up a vendor as a tax agency in two ways:
 - By selecting **Tax Agency** in the **Category** field on the vendor record.
 - By clicking the plus icon (New) next to the **Tax Agency** field on the nexus record.
8. Click **Save**.

Nexus

[Edit](#) [Back](#) [Actions](#)

COUNTRY
Canada

STATE/PROVINCE/COUNTY

DESCRIPTION
Canada

PARENT NEXUS

☐ INACTIVE

☐ USE FULFILLMENT TO MODIFY TAX POINT DATE
TAX AGENCY
Canada Revenue Agency

To create a Canadian Province as Subnexus:

1. Go to Setup > Tax > Nexuses > New.
2. In the **Country** field, select Canada.
3. In the **State/Province/County** field, select the state, province, or county that the nexus is located in.
 - If a state/province/county record does not exist, create a new record at Setup > Company > Setup Tasks > States/Provinces/Counties > New (Administrator).
4. In the **Description** field, enter text that describes this nexus.
5. In **Parent Nexus** field, select the 'Canada' nexus created earlier
6. When you no longer report taxes in this nexus, or if you set it up in error, check the **Inactive** box.
7. In the **Tax Agency** field, select the name of the tax vendor to whom you submit tax reports and remit payments.
 - You can set up a vendor as a tax agency in two ways:
 - By selecting **Tax Agency** in the **Category** field on the vendor record.
 - By clicking the plus icon (New) next to the **Tax Agency** field on the nexus record.
8. Click **Save**.

Nexus
[Edit](#) [Back](#) | [Actions](#) ▼

COUNTRY
Canada

STATE/PROVINCE/COUNTY
Alberta

DESCRIPTION
Canada - Alberta

PARENT NEXUS
[Canada](#)

☐ INACTIVE

☐ USE FULFILLMENT TO MODIFY TAX POINT DATE

TAX AGENCY
[Canada Revenue Agency](#)

Nexus
[Edit](#) [Back](#) | [Actions](#) ▼

COUNTRY
Canada

STATE/PROVINCE/COUNTY
Ontario

DESCRIPTION
Canada - Ontario

PARENT NEXUS
[Canada](#)

☐ INACTIVE

☐ USE FULFILLMENT TO MODIFY TAX POINT DATE

TAX AGENCY
[Canada Revenue Agency](#)

Tax Types

Tax Type is used to link tax codes to nexuses and to the proper general ledger accounts, and to group tax amounts on the transaction summary box.

The NetSuite SuiteTax Engine automatically provisions Tax Types based on the nexuses identified under the subsidiary tax registrations tab. You can also create your own Tax Types, if needed.

To view the list of NetSuite provisioned Tax Types, navigate to **Setup > Tax > Tax Types**.

Setup Manager More

SEARCH

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- Tax
 - SuiteTax Migration
 - Nexuses
 - Tax Types**
 - Tax Codes
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- Customization
- Integration
- Custom
- SuiteTax Engine
- Dashboard Tiles

Tax Types

VIEW Tax Type Customize View New Tax Type

FILTERS

SHOW INACTIVES TOTAL: 35

| EDIT | VIEW | NAME | DESCRIPTION | COUNTRY ▲ |
|-------------|------|---------------------|--|----------------|
| Edit View | | VAT_FR_RCS | Reverse Charge for Sales Tax Type - France (for zero rated sales subject to RCH) | France |
| Edit View | | VAT_FR_RC | Reverse Charge Tax Type for France | France |
| Edit View | | VAT_FR | Tax Type for France | France |
| Edit View | | VAT_DE_RCS | Reverse Charge for Sales Tax Type - Germany (for zero rated sales subject to RCH) | Germany |
| Edit View | | VAT_DE_RC | Reverse Charge Tax Type for Germany | Germany |
| Edit View | | VAT_DE | Tax Type for Germany | Germany |
| Edit View | | VAT_GB_RCS | Reverse Charge for Sales Tax Type - United Kingdom (for zero rated sales subject to RCH) | United Kingdom |
| Edit View | | VAT_GB_RC | Reverse Charge Tax Type for United Kingdom | United Kingdom |
| Edit View | | VAT_GB | Tax Type for United Kingdom | United Kingdom |
| Edit View | | VAT_RCP | Reverse charge on purchases | United Kingdom |
| Edit View | | US_STATE_USE_SPEC | Tax Type for United States State Use Specific Tax | United States |
| Edit View | | US_STATE_USE | Tax Type for United States State Use Tax | United States |
| Edit View | | US_STATE_SALES_SPEC | Tax Type for United States State Sales Specific Tax | United States |
| Edit View | | US_STATE_SALES | Tax Type for United States State Sales Tax | United States |
| Edit View | | US_NL | Tax Type for United States Not Liable Tax | United States |

Tax Type

Edit Back Actions

COUNTRY
Germany

NAME
VAT_DE

DESCRIPTION
Tax Type for Germany

☐ DOES NOT ADD TO TRANSACTION TOTAL

☐ POST TO ITEM COST

☐ TAX INCLUDED IN NET AMOUNT

☐ REVERSE CHARGE

☐ REVERSE CHARGE FOR SALES

☐ INACTIVE

Accounts System Notes

| NEXUS | PAYABLES ACCOUNT | RECEIVABLES ACCOUNT |
|---------|----------------------|--------------------------|
| Germany | Tax on Sales Germany | Tax on Purchases Germany |

To create a new Tax Type:

1. Go to Setup > Tax > Tax Types > New.
2. Select the country that you are making a tax type for. Only countries where a nexus has been created are available for selection in the list.
3. Enter a name for this tax type.
4. Enter a description for this tax type.
5. If applicable, set a special property for the tax type. E.g. For Withholding taxes, check the box 'Does Not Add to Transaction Total'.
6. Check the **Inactive** box if you do not want this tax type to be available for use in lists and transactions.
7. Add nexuses and assign tax accounts for each nexus by performing the following steps:
 - In the **Nexus** column, select a nexus.
 - In the **Payables Account** column, select an account to which taxes on sales transactions for the nexus should be posted.
 - In the **Receivables Account** column, select an account to which taxes on purchase transactions for the nexus should be posted.
 - Click **Add**.
8. Repeat the substeps under Step 7 for each nexus that you want to associate with this tax type.
9. Click **Save**.

Tax Type

[Edit](#) [Back](#) | [Actions](#) ▼

COUNTRY
Philippines

NAME
PH_WHT

DESCRIPTION
Withholding Tax Type

☒ DOES NOT ADD TO TRANSACTION TOTAL

☐ POST TO ITEM COST

☐ TAX INCLUDED IN NET AMOUNT

☐ REVERSE CHARGE

☐ REVERSE CHARGE FOR SALES

☐ INACTIVE

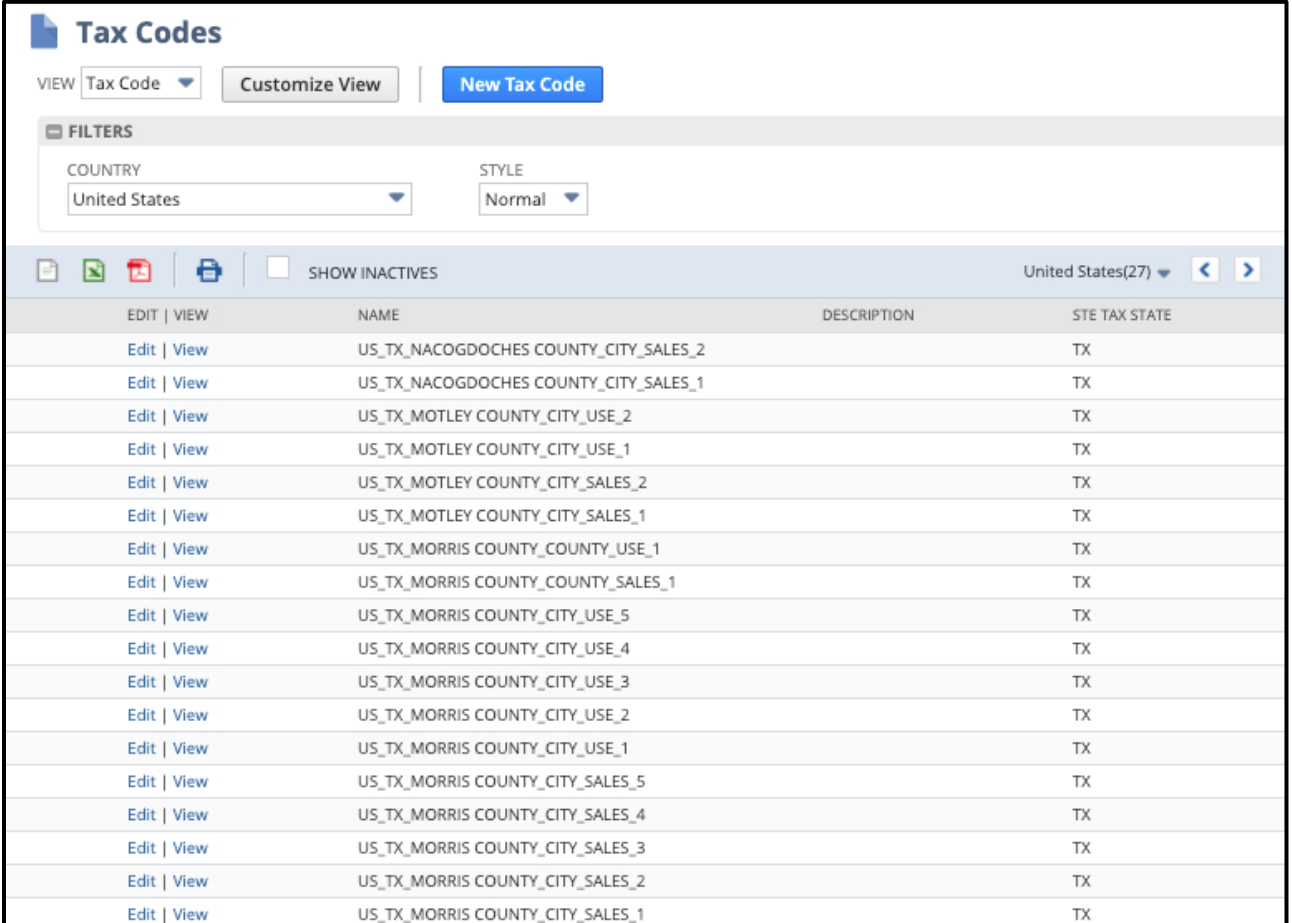
| Accounts | | | System Notes |
|-------------|---------------------------|----------------------------|--------------|
| NEXUS | PAYABLES ACCOUNT | RECEIVABLES ACCOUNT | |
| Philippines | Withholding Tax Liability | Withholding Tax Receivable | |

Tax Codes

Tax Code is the basis by which the appropriate tax rate is applied to transactions. The tax code is usually based on information provided by the tax agency in the country or nexus you transact in.

The NetSuite SuiteTax Engine automatically provisions Tax Codes based on the nexuses identified under the subsidiary tax registrations tab. You can also create your own Tax Codes, if needed.

To view the list of current Tax Codes, navigate to **Setup > Tax > Tax Codes**.



| EDIT VIEW | | NAME | DESCRIPTION | STE TAX STATE |
|-------------|--|---------------------------------------|-------------|---------------|
| Edit View | | US_TX_NACOGDOCHES COUNTY_CITY_SALES_2 | | TX |
| Edit View | | US_TX_NACOGDOCHES COUNTY_CITY_SALES_1 | | TX |
| Edit View | | US_TX_MOTLEY COUNTY_CITY_USE_2 | | TX |
| Edit View | | US_TX_MOTLEY COUNTY_CITY_USE_1 | | TX |
| Edit View | | US_TX_MOTLEY COUNTY_CITY_SALES_2 | | TX |
| Edit View | | US_TX_MOTLEY COUNTY_CITY_SALES_1 | | TX |
| Edit View | | US_TX_MORRIS COUNTY_COUNTY_USE_1 | | TX |
| Edit View | | US_TX_MORRIS COUNTY_COUNTY_SALES_1 | | TX |
| Edit View | | US_TX_MORRIS COUNTY_CITY_USE_5 | | TX |
| Edit View | | US_TX_MORRIS COUNTY_CITY_USE_4 | | TX |
| Edit View | | US_TX_MORRIS COUNTY_CITY_USE_3 | | TX |
| Edit View | | US_TX_MORRIS COUNTY_CITY_USE_2 | | TX |
| Edit View | | US_TX_MORRIS COUNTY_CITY_USE_1 | | TX |
| Edit View | | US_TX_MORRIS COUNTY_CITY_SALES_5 | | TX |
| Edit View | | US_TX_MORRIS COUNTY_CITY_SALES_4 | | TX |
| Edit View | | US_TX_MORRIS COUNTY_CITY_SALES_3 | | TX |
| Edit View | | US_TX_MORRIS COUNTY_CITY_SALES_2 | | TX |
| Edit View | | US_TX_MORRIS COUNTY_CITY_SALES_1 | | TX |

Tax Codes

VIEW Tax Code

Customize View

New Tax Code

FILTERS

COUNTRY

United Kingdom

STYLE

Normal

☐ SHOW INACTIVES

| EDIT VIEW | NAME | DESCRIPTION |
|---|---------------|--|
| Edit View | VAT RCP | Reverse Charge on purchases |
| Edit View | RC+PTIC | Non-claimable reverse charge |
| Edit View | GB_ZR | Zero rate for UNITED KINGDOM |
| Edit View | GB_SR_RC_PTIC | Reverse charge - Standard rate for UNITED KINGDOM (Non-Deductible) |
| Edit View | GB_SR_RC | Reverse charge - Standard rate for UNITED KINGDOM |
| Edit View | GB_SR | Standard rate for UNITED KINGDOM |
| Edit View | GB_RR_RC | Reverse charge - Reduced rate for UNITED KINGDOM |
| Edit View | GB_RR | Reduced rate for UNITED KINGDOM |
| Edit View | GB_RCS | Reverse charge for sales for UNITED KINGDOM |
| Edit View | GB_NL | Not liable to tax in UNITED KINGDOM |

Tax Code

Edit

Back

Actions

NAME
DE_SR

DESCRIPTION
Standard rate for GERMANY

TAX TYPE
VAT_DE

☐ INACTIVE

PAYABLES ACCOUNT
Tax on Sales Germany

RECEIVABLES ACCOUNT
Tax on Purchases Germany

AVAILABLE ON
Both

TAX RATE TYPE
Standard

TAX RATE
16%

Tax Rate Overview

System Notes

| RATE | START DATE | END DATE |
|------|------------|------------|
| 16% | 01/07/2020 | - |
| 19% | 01/01/1968 | 30/06/2020 |

To create a new Tax Code:

1. Go to Setup > Tax > Tax Codes > New.
2. Enter a name for this tax code.
3. Enter a description for this tax code.
4. Select the tax type for this tax code. You can create a new tax type at *Setup > Accounting > Taxes > Tax Types > New*.
5. Check the **Inactive** box if you do not want this tax code to be available for use in lists and transactions.
6. In the **Available On** field, select a type of transaction.
7. In the **Tax Rate Type** field, select a tax rate type.
 - **Standard** – typical purchase or sales transactions.
 - **Reduced** (including special and super-reduced rates) – transactions with special conditions.
 - **Zero** – indicates a tax rate of zero.
 - **Exempt** – indicates that the transaction is not liable to tax.
8. Click **Save**.

Note: Once the tax code is saved, the tax type value can no longer be changed.

The screenshot shows the 'Tax Code' setup form. At the top, there are navigation links (back, forward, List, Search) and action buttons (Save, Cancel, Reset, Actions). The form is divided into several sections: 'NAME' with a text input containing 'WC010-2018'; 'DESCRIPTION' with a text area containing 'Professional (lawyers, CPAs, engineers, etc.) if gross income for the current year did not exceed P720,000 - Corporate'; 'TAX TYPE' with a dropdown menu showing 'PH_WHT'; 'INACTIVE' checkbox (unchecked); 'PAYABLES ACCOUNT' dropdown showing '2308 Tax Liability : Withholding Tax Liabili'; 'RECEIVABLES ACCOUNT' dropdown showing '1608 Tax on Purchases : Withholding Tax'; 'AVAILABLE ON' dropdown showing 'Both'; 'TAX RATE TYPE' dropdown showing 'Standard'; and 'TAX RATE' text input showing '10%'. There is also an external link icon next to the TAX TYPE dropdown.

Tax Groups

Tax Group is a combination of several tax codes that can be applied to one transaction, even if the taxes are paid to different jurisdictions. The tax group rate is the sum of these separate tax codes.

The NetSuite SuiteTax Engine automatically provisions Tax Groups based on the nexuses identified under the subsidiary tax registrations tab. You can also create your own Tax Groups, if needed.

To view the list of current Tax Groups, navigate to **Setup > SuiteTax Engine > Tax Groups**.

Setup Manager

SEARCH

SETUP TASKS

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- Integration
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- SuiteTax Engine

Manage SuiteTax Engine Roles

Format Tax Registrations

Tax Schedules

US Exemption Certificates

Non-taxability Rules

Tax Groups

Dashboard Tiles

Navigation Portlet

Tax Reporting

Tax Groups

[New Tax Group](#)

FILTERS

COUNTRY: All

CREATED BY: All

☐ SHOW INACTIVES

Tax Groups •

| EDIT VIEW | NAME | COUNTRY | NEXUS ▲ |
|---|--------------|---------------|------------------|
| Edit View | US0600000000 | United States | United States CA |
| Edit View | US0600100000 | United States | United States CA |
| Edit View | US0600100562 | United States | United States CA |
| Edit View | US0600100674 | United States | United States CA |
| Edit View | US0600106000 | United States | United States CA |
| Edit View | US0600120018 | United States | United States CA |
| Edit View | US0600122594 | United States | United States CA |
| Edit View | US0600126000 | United States | United States CA |
| Edit View | US0600133000 | United States | United States CA |
| Edit View | US0600141992 | United States | United States CA |
| Edit View | US0600150916 | United States | United States CA |
| Edit View | US0600153000 | United States | United States CA |
| Edit View | US0600156938 | United States | United States CA |
| Edit View | US0600157792 | United States | United States CA |
| Edit View | US0600168084 | United States | United States CA |

Tax Group

[Edit](#) | [Back](#)

NAME
US0600000000

NEXUS
1

DESCRIPTION

☐ INACTIVE

Tax Codes •

| TAX CODE | RATE ▲ | AVAILABLE ON SALES | AVAILABLE ON PURCHASES |
|---------------------|--------|-------------------------------------|-------------------------------------|
| US_CA_STATE_SALES_1 | 6% | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| US_CA_STATE_USE_1 | 6% | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

To set up Tax Groups:

1. Go Setup > SuiteTax Engine > Tax Groups.
2. Click New Tax Group.
3. In the **Name** field, enter a name for this tax group.
4. From the **Nexus** list, choose the nexus this tax group will apply to. Only the active nexuses assigned to the account will appear in this list.
5. OPTIONAL: In the **Description** field, you can enter a short sentence describing this tax group.
6. Choose at least one tax code from the **Tax Codes list**.
7. Click **Save**.

The SuiteTax Engine automatically provisions Tax Groups for US and Canada Nexuses only.

Others

Not all Tax Types, Tax Codes, and Tax Groups are automatically provisioned by the NetSuite SuiteTax Engine. Below are some scenarios where you will need to setup the tax records manually.

- Withholding Taxes
- Non-Deductible Standard VAT
- Non-Deductible Reverse Charge

SETUP ENTITY & ITEM SETTINGS

Assign Entity Tax Registrations

With SuiteTax, you can setup multiple tax registrations under a single entity record. Unlike Legacy Tax where you need to create separate entity record for each unique tax registration, with SuiteTax you can maintain just a single entity record regardless if the customer/vendor is registered across different state/countries.

To add Tax Registrations to an entity:

1. Go to Lists > Relationships > Customers (or Leads, Prospects, Vendors, Partners, Other Names).
2. Click the **Edit** link next to the entity.
3. Click the **Financial** subtab.
4. Click the **Tax Registrations** subtab.
5. To add a tax registration:
 - Select a Country.
 - Select a Nexus. Only nexuses for the selected country are available in the list.
 - Select the Address for this nexus. Only the address labels are shown in the list. You can set the labels for entity addresses on the **Address** subtab of the entity record.
 - If you add a new address on the entity record, you must save the record first before you can assign the new address to the nexus.
 - Enter the tax registration number to use for this nexus. (Legacy **Tax Reg. Number** value will be migrated as the initial Tax. Reg. Number)
 - Click **Add**.
 - Repeat the substeps under Step 5 for each tax registration that you want to use for trading with this entity.
6. Click **Save**.

The Default Tax Registration number that you set on the entity record will be used as the default value in the Entity Tax Reg. Number field on transactions.

Depending on the country code, the SuiteTax Engine performs one of the following types of validation:

- **Validity Checking** – For tax registration numbers registered in the European Union (EU), the SuiteTax Engine checks for validity using the EU VAT Information Exchange System (VIES). For more information, see SuiteAnswers ID **85732**
- **Format Checking** – For tax registration numbers registered outside the European Union (EU), the SuiteTax Engine checks the format of the tax registration number against a pre-defined format. For more information, see SuiteAnswers ID **85733**

| Relationships | Communication | Address | Sales | Marketing | Financial | Preferences | System Information | Access | Tax Reporting | Bank Payment Details (Debit) | |
|--|----------------|----------------|---------------|-----------------|-----------|-----------------------------------|---------------------------|-------------------------------|---|------------------------------|------------------------|
| Account Information | | | | | | | | | | | |
| ACCOUNT | | | END DATE | | | PRIMARY CURRENCY British pound | | | | | |
| DEFAULT RECEIVABLES ACCOUNT Use System Preference | | | REMINDER DAYS | | | TERMS Net 30 | | | | | |
| START DATE | | | PRICE LEVEL | | | CREDIT LIMIT | | | | | |
| Tax Information | | | | | | | | | | | |
| DEFAULT TAX REG. HOLD GB391313073 Auto | | | | | | | | | | | |
| Currencies • Credit Cards Tax Registrations • Group Pricing Item Pricing | | | | | | | | | | | |
| COUNTRY | STATE | NEXUS | ADDRESS | TAX REG. NUMBER | EXEMPT | DEFAULT TAX CODE/GROUP | VALIDATION RESULT | NAME | ADDRESS FROM VIES | CONSULTATION NUMBER | DATE STAMP |
| United Kingdom | Greater London | United Kingdom | | GB391313073 | | | Tax reg. number is valid. | ORACLE CORPORATION UK LIMITED | BUILDING 510, ORACLE PARKWAY, THAMES VALLEY PARK, READING, BERKSHIRE, , RG6 1RA | WAPIAAAAXXychnJ | 17/11/2020 11:58:46 am |
| France | | France | | FR06335092318 | | | Tax reg. number is valid. | SASU ORACLE FRANCE | 15 BD CHARLES DE GAULLE, 92700 COLOMBES | WAPIAAAAXXyUYaH | 17/11/2020 11:58:13 am |

Set Tax Item Types

The SuiteTax Engine uses tax item types for tax calculation and VAT reporting purposes. You can set two tax item types:

- Services – This tax item type classifies and reports the transaction under Services.
- Goods – This tax item type classifies this and reports the transaction under Goods.

Setting a tax item type in your item records is optional. The SuiteTax Engine automatically sets the tax item type when creating a new item and uses the following default tax item type values:

- All service items have a default tax item type of Services.
- All other standard item types have a default tax item type of Goods.

For existing items, the tax item type must be set manually.

To set the Tax Item Type:

1. Go to Lists > Accounting > Items.
2. Click **Edit** next to the item you want to update.
3. Click the Tax subtab.
4. In the Tax Item Type field, select a tax item type from the list.
5. Click Save.

United States Specific Tax Settings

US Exemption Certificates

Sales Tax Exemption Certificates enable a purchaser to make tax-free purchases that would normally be subject to Sales Tax. The SuiteTax Engine provides support for tracking the tax exemptions allowed by respective US states. Exemption certificates are considered for tax determination.

To create an exemption certificate, the customer record must be active and have at least one US tax registration on the entity record.

To create an exemption certificate:

1. Go to Setup > SuiteTax Engine > US Exemption Certificates.
2. Click New Certificate.
3. On the US Exemption Certificate page, fill in mandatory fields:
 - Customer
 - **State** (only states where customer has a tax registration will appear on this list)
 - Certificate number
 - at least one **Validity date**
 - **Subsidiary** (only OneWorld accounts)
4. You can upload a copy of the certificate by clicking the **Attachment** button and adding a note.
5. In the **Items** section, the **Apply To All Items** box is checked by default, meaning that the exemption certificate applies to all items (Blanket Certificate). There must be at least one item selected, or the **Apply To All Items** (Blanket Certificate) box must be checked to save the record.
6. If you want the exemption certificate to apply only to specified items, clear the **Apply To All Items** (Blanket Certificate) box and add the respective items by:

- using an item saved search
- copying items from another existing certificate for this customer
- selecting items manually from the list

7. Click **Save**.

US Exemption Certificates More

New Certificate

Filters

CUSTOMER

STATE

VALIDITY

All

All

All

Filter

US Exemption Certificates •

| EDIT VIEW | CUSTOMER | SUBSIDIARY | STATE | CERTIFICATE NUMBER | APPLIED ITEMS | VALID FROM | VALID UNTIL | NOTES |
|------------------------------|--------------------|---------------------------------------|---------------|-----------------------|-------------------------|---------------|----------------|---------------------------------------|
| <a>Edit <a>View | Abbott Inc. | Parent Company : NOAM : US West CA | California | 05568-2 | Individual Items (2) | 01/07/2019 | 30/06/2026 | Tax exemption for first aid kits |
| <a>Edit <a>View | Hugo Limited | Parent Company : NOAM : US East NY | New York | 211670 | Individual Items (2) | 01/07/2019 | 30/06/2026 | Tax exemption for first aid kits |
| <a>Edit <a>View | Gotter inc. | Parent Company : NOAM : US East MA | Massachusetts | 251824 | Individual Items (2) | 01/07/2019 | 30/06/2026 | Tax exemption for first aid kits |
| <a>Edit <a>View | Greenwood Fashion | Parent Company : NOAM : US East NY | New York | 667812 | Individual Items (3) | 01/07/2019 | 12/06/2026 | Tax exemption for apparel items in NY |
| <a>Edit <a>View | Karmabit Nonprofit | Parent Company : NOAM : US East NY | New York | 667890 | All | 01/07/2019 | 30/06/2026 | Exception on all items |
| <a>Edit <a>View | KMCe Foundation | Parent Company : NOAM : US West CA | California | CER0001 | All | 01/01/2020 | 31/12/2020 | Exemption applied to all items |
| <a>Edit <a>View | KMCe Holdings | Parent Company : NOAM : US East MA | Pennsylvania | CER0002 | Individual Items (2) | 01/01/2020 | 31/12/2020 | Exemption applied to a few items. |
| <a>Edit <a>View | KMCe | Parent Company : NOAM : US West CA | California | CER0003 | Individual Items (3) | 01/01/2020 | 31/03/2020 | Exemption applied to a few items. |

New Certificate

US Exemption Certificate

Save Cancel Reset Delete

CUSTOMER * SUBSIDIARY *
 Abbott Inc. Parent Company : US West CA

STATE *
 California

CERTIFICATE NUMBER *
 05568-2

VALID FROM VALID UNTIL
 01/07/2019 30/06/2026

NOTES
 Tax exemption for first aid kits

ATTACHMENT
[Partial Exemption Certificate for Manufacturing, Research, and Development Equipment.pdf](#) Delete

ITEMS •

☐ APPLY EXEMPTION TO ALL ITEMS (BLANKET CERTIFICATE)

SELECT ITEM SAVED SEARCH COPY FROM OTHER CERTIFICATE
 Add Items Add Items

Clear All

| ITEM NAME/NUMBER * |
|--|
| First Aid Safety - OSHA Compliant Bulk 25-person First Aid K |
| First Aid To Go |

Item Non-Taxability Rules

Item Non-taxability Rules allows users to create a list of items that are generally non-taxable in a specific nexus.

Item Non-taxability rules can be created, edited, and viewed on the Non-Taxability Rules page or the Nexus page.

To create Item Non-taxability rules on the **Non-Taxability Rules** page:

1. Go to Setup > SuiteTax Engine > Non-taxability Rules.
2. Click New Rule.
3. On the Item Non-taxability Rules page, select a nexus in the **Nexus** field. The **Country** field is set to the *United States* by default.
4. In the **Items** section you can add individual items by:
 - o using an item saved search
 - o copying a list of non-taxable items from a nexus (items do not inherit the validity dates from the nexus)
 - o choosing specific items manually from the list
5. Optionally, in the **Items** section, enter validity dates for each item. Dates can be added manually for each item, or if the **Validity Dates** box is checked, the SuiteTax Engine automatically fills the validity date for all added items.

6. Click **Save**.

Item Non-taxability Rule More

Save | **Cancel** | **Reset** | **Delete**

Primary Information

COUNTRY *
United States ▼

NEXUS *
United States CA ▼

Items •

☐ VALIDITY DATES VALID FROM VALID UNTIL

SELECT ITEM SAVED SEARCH ▼ **Add Items** COPY FROM NEXUS ▼ **Add Items**

Clear All

| ITEM NAME/NUMBER * | VALID FROM | VALID UNTIL |
|--|------------|-------------|
| 42 Piece Tool Kit | | |
| General Repair Tool Kit | | |
| Cell Phone, Tablets, Laptop Repair kit | | |
| Wireless Keyboard | 21/01/2020 | 04/02/2020 |
| Ergonomic Keyboard | 21/01/2020 | 04/02/2020 |
| Ergonomic mouse pad | 21/01/2020 | 04/02/2020 |

To create Item Non-taxability Rules on the **Nexus** record page:

1. Go to Setup > Tax > Nexuses.
2. Click **Edit** next to the nexus for which you want to create Non-taxability Rules.
3. On the Nexus page, click the **Non-taxability Rules** subtab.
4. In the **Items** section you can add individual items by:
 - using an item saved search.
 - copying a list of non-taxable items from a nexus (items do not inherit the validity dates from the nexus).
 - choosing specific items manually from the list.
5. Optionally, in the **Items** section, enter validity dates for each item. You can add dates manually for each item, or if the **Validity Dates** box is checked, the SuiteTax Engine automatically fills the validity date for all added items.
6. Click **Save**.

Save

Cancel

Reset

COUNTRY

United States

STATE/PROVINCE/COUNTRY

California

DESCRIPTION *

United States CA

PARENT NEXUS

☐ INACTIVE

USE FULFILLMENT TO MODIFY TAX POINT DATE

☐

TAX AGENCY

California Department of Revenue

+

Nexus Preferences

Non-taxability Rules

System Notes

☐ VALIDITY DATES

VALID FROM

VALID UNTIL

SELECT ITEM SAVED SEARCH

Add Items

COPY FROM NEXUS

Add Items

Clear All

| ITEM NAME/NUMBER | VALID FROM | VALID UNTIL |
|--|------------|-------------|
| 42 Piece Tool Kit | | |
| General Repair Tool Kit | | |
| Cell Phone, Tablets, Laptop Repair kit | | |
| Wireless Keyboard | 21/01/2020 | 04/02/2020 |
| Ergonomic Keyboard | 21/01/2020 | 04/02/2020 |
| Ergonomic mouse pad | 21/01/2020 | 04/02/2020 |
| Computer Glove With ergo adjustment | 21/01/2020 | 04/02/2020 |
| Keyboard & Mouse Combo | 21/01/2020 | 04/02/2020 |
| Wireless Keyboard & Mouse Combo | 21/01/2020 | 04/02/2020 |
| Ergoprene Gel Mouse Pad | 21/01/2020 | 04/02/2020 |
| | | |

Add

Cancel

Insert

Remove

Save

Cancel

Reset

VAT Countries Specific Tax Settings

Tax Schedules

Tax Schedules allow users to define tax codes for specific conditions and items for your sales and purchase transactions. Tax schedules are optional, and only required when you need to use a tax code that is different from the nexus default tax codes for certain supplies of goods and services.

Tax Schedules are used side-by-side with Items. You can add multiple items to a Tax Schedule using a saved search. You can also add specific items to the tax schedule individually. Additionally, you can add a tax schedule through the item record. Multiple Items can be assigned to the same Tax Schedule. However, an item can only be assigned to one Tax Schedule. In case an item is assigned to another Tax Schedule, the Tax Schedule recently updated will take precedence.

Existing Tax Schedules in Legacy Tax are NOT migrated to SuiteTax. Make sure you have the list of all your Tax Schedules, nexuses assigned to each Tax Schedule, and the items assigned to each Tax Schedule BEFORE you enable the SuiteTax feature. Once the SuiteTax feature is enabled, the Legacy Tax Schedule field will no longer be available on the item record. You will not have any option to retrieve the Legacy Tax Schedule data. It will be replaced with a new Tax Schedule field under the Tax tab. If you are not able to see this new Tax Schedule field, customize the form and show the field.

To create a Tax Schedule:

1. Go to Setup > SuiteTax Engine > Tax Schedules.
2. Click **New**.
3. In the **Name** field, enter a name for this Tax Schedule.
4. In the **Description** field, enter a short sentence describing this tax schedule.
5. Under the **Nexus** subtab, complete the table per nexus:
 - In the **Nexus** column, select a nexus to which this tax schedule applies. Only nexuses assigned to use SuiteTax Engine appear in this list.
 - Select a tax code or tax group for every transaction type to which this tax schedule applies to.
6. Click the **Items** subtab.
7. Enter additional information as necessary. You can map this tax schedule to a saved search, specific individual items, or both.
 - To add multiple items using the saved search in the **Select Item Saved Search** field, select a saved search from the dropdown.
 - To add specific items to the tax schedule:
 - In the **Item Name Number** column, select an item from the dropdown.
 - Click **Open** to view the item record.
 - Click **Add** to add the item.
 - Continue adding items as necessary.
8. When you have finished, click **Save**.

Tax Schedule

Save

Cancel

Reset

Delete

More

NAME *

S1

DESCRIPTION

Taxable

Nexuses • Items •

| NEXUS * | DOMESTIC SALES | DOMESTIC PURCHASES | EXPORTS | IMPORTS | INTRA-COMMUNITY SALES | INTRA-COMMUNITY PURCHASES |
|----------------|----------------|--------------------|---------|---------|-----------------------|---------------------------|
| United Kingdom | GB_SR | GB_SR | GB_NL | GB_SR | GB_RCS | GB_SR_RC |
| <div></div> | | | | | | |

✓ Add

✕ Cancel

+ Insert

🗑 Remove

Nexuses • Items •

SELECT ITEM SAVED SEARCH

Add Items

ITEM NAME/NUMBER *

42 Piece Tool Kit

✓ Add

✕ Cancel

+ Insert

🗑 Remove

To assign a Tax Schedule to an item record:

1. Go to Lists > Accounting > Items.
2. Click **Edit** next to the item you want to update.
3. Click the **Tax** subtab.
4. In the **Tax Schedule** field, select a tax schedule. You must create tax schedules first before they appear in the list.
5. Click **Save**.

42 Piece Tool Kit

Save

Cancel

Reset

+

Actions

Primary Information

CUSTOM FORM

Custom Non-Inventory Part Form

ITEM NAME/NUMBER *

42 Piece Tool Kit

VENDOR NAME/CODE

INTERNAL ID

22

DISPLAY NAME/CODE

42 Piece Tool Kit

SUBITEM OF

Classification

SUBSIDIARY

Parent Company

Parent Company : UK

Parent Company : US East MA

Parent Company : US East NY

Parent Company : US West CA

DEPARTMENT

LOCATION

CLASS

Class-A

INCLUDE CHILDREN

☒

Purchasing

Sales / Pricing

Accounting

Web Store

Related Records

Communication

Preferences

System Information

Custom

Tax Reporting

Tax

TAX SCHEDULE

S1

TAX ITEM TYPE

Select a Tax Schedule to use a different tax code/group other than the ones in your nexus.

INSTALL LOCALIZED TAX REPORTS

During this step, you will need to install all applicable country tax report bundles. The country tax report bundles that you need to install will vary depending on the countries (nexuses) assigned on the subsidiary records. Before doing the installation, make sure the **Tax Reporting Framework** bundle (**237699**) is installed on the account.

Country tax report bundles, including its prerequisite bundles, must be installed in a specific order.

Refer to **Appendix B** for the list of currently available country tax reports, related bundles IDs, and installation order.

Sample Bundles:

| NAME | BUNDLE ID | VERSION | MANAGED | ABSTRACT | ADMIN DOCUMENTATION | STATUS | OWNER |
|--|-----------|---------|---------|--|-------------------------------------|--------|--|
| Tax Reporting Framework | 237699 | 1.01.0 | Yes | Provides the tax reporting framework for all NetSuite SuiteTax and Localization SuiteApps. | | ✓ | NetSuite Platform Solutions Group - Tax Reporting Framework (5170090) |
| EMEA Localization | 303903 | 1.01.2 | Yes | Provides the content that will be used to generate tax reports required in Germany and the United Kingdom. | Admin Documentation | ✓ | NetSuite Platform Solutions Group - EMEA Localization (5888283) |
| United Kingdom Localization | 303970 | 1.02.0 | Yes | Delivers templates so that UK tax reports can be generated and submitted digitally to Her Majesty's Revenue and Customs. | Admin Documentation | ✓ | NetSuite Platform Solutions Group - UK Localization (5888234) |
| SuiteTax Country Tax Reports JAPAC | 303913 | 1.00.3 | Yes | Supplements the SuiteTax Reports SuiteApp with tax reporting localization and report templates for the countries in the JAPAC region. | | ✓ | NetSuite Platform Solutions Group - SuiteTax Country Tax Reports JAPAC (5891573) |
| Belgium Localization | 307195 | 1.01.3 | Yes | | | ✓ | NetSuite Platform Solutions Group - Belgium Localization (5965636) |
| SuiteTax EMEA Audit Files | 303920 | 1.00.0 | Yes | Supplements the SuiteTax Reports SuiteApp with the capability to generate accounting data records and master files for SAF-T compliance. | | ✓ | NetSuite Platform Solutions Group - SuiteTax EMEA Audit Files (5856250) |

NOTE: On the Preview Bundle Install page, confirm that the following actions are applied for each set of conflicting objects:

- In the **Action** column, **Replace Existing Object** is selected.
- In the Preference column, Replace Data for Conflicting Custom Records and Custom Lists is selected.

Preview Bundle Install

Cancel

Install Bundle

Name: EMEA Localization

Version: 1.00.2

| BUNDLE CONTENTS | EXISTING OBJECT IN CONFLICT | SCRIPT ID | ACTION | PREFERENCE | INTERNAL ID | LOCK ON INSTALL |
|-------------------------|-----------------------------|--------------------------------------|---|-------------------------------|-------------|-----------------|
| Custom Fields | | | | | | |
| Item Fields | | | | | | |
| Commodity Code | Commodity Code | custitem_str_commodity_code | <div><div></div><div>Replace Existing Object</div></div> | | 510 | <div></div> |
| Supplementary Units | Supplementary Units | custitem_str_supplementary_units | <div><div></div><div>Add and Rename</div></div> | Show on Existing Custom Forms | 506 | <div></div> |
| Supplementary code | Supplementary code | custitem_str_supplementary_unit_code | <div><div></div><div>Add and Rename</div><div>Replace Existing Object</div></div> | Show on Existing Custom Forms | 508 | <div></div> |
| Transaction Body Fields | | | | | | |

OTHERS

During this step, your focus is on the customization of the transaction forms, transaction PDF layouts, and roles.

Transaction Forms

In SuiteTax, transaction forms include the a new **Tax Details** subtab. You can move the position of the tab and the fields within it. However, you cannot customize the columns within the Taxes table.

| LABEL | SHOW | MANDATORY | DISPLAY TYPE | CHECK BOX DEFAULT | DESCRIPTION | FIELD GROUP | COLUMN BREAK | SPACE BEFORE | SAME ROW AS PREVIOUS |
|----------------------------|-------------------------------------|--------------------------|--------------|-------------------|----------------------------|-------------|--------------------------|--------------|-------------------------------------|
| Nexus | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Normal | | Nexus | | <input type="checkbox"/> | | <input type="checkbox"/> |
| Nexus Override | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Normal | Use Field Default | Nexus Override | | <input type="checkbox"/> | | <input type="checkbox"/> |
| Subsidiary Tax Reg. Number | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Normal | | Subsidiary Tax Reg. Number | | <input type="checkbox"/> | | <input type="checkbox"/> |
| Tax Details Override | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Normal | Use Field Default | Tax Details Override | | <input type="checkbox"/> | | <input type="checkbox"/> |
| Customer Tax Reg. Number | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Normal | | Entity Tax Reg. Number | | <input type="checkbox"/> | | <input type="checkbox"/> |
| Tax Point Date | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Normal | | Tax Point Date | | <input type="checkbox"/> | | <input type="checkbox"/> |
| Override | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Normal | Use Field Default | Tax Point Date Override | | <input type="checkbox"/> | | <input checked="" type="checkbox"/> |

For sales transactions, the **Summary** box shows the **Tax Total** field and tax summary by tax type. You can customize the transaction form to change the labels and to show the **Total After Taxes** field.

| Summary | |
|-------------------|--------|
| SUBTOTAL | 600.00 |
| DISCOUNT ITEM | |
| TAX TOTAL | 56.22 |
| US_STATE_SALES | 18.36 |
| US_COUNTY_SALES | 37.86 |
| TOTAL | 656.22 |
| TOTAL AFTER TAXES | 656.22 |
| AMOUNT DUE | 656.22 |

| LABEL | SHOW | DESCRIPTION |
|-------------------|-------------------------------------|-------------------|
| Amount Due | <input checked="" type="checkbox"/> | Amount Remaining |
| Subtotal | <input checked="" type="checkbox"/> | Subtotal |
| Tax Total | <input checked="" type="checkbox"/> | Tax Total |
| Total | <input checked="" type="checkbox"/> | Total |
| Total After Taxes | <input checked="" type="checkbox"/> | Total After Taxes |

Transaction PDF Layouts

SuiteTax provides predefined advanced print templates that you can use for the following supported transactions. To print transactions with tax information in SuiteTax, you need to enable the Advanced PDF/HTML Templates feature and use custom transaction forms that use the SuiteTax advanced print templates.

| TRANSACTION TYPE | SUITETAX ADVANCED PDF/HTML TEMPLATE |
|----------------------|--|
| Cash Refund | Standard Cash Refund PDF/HTML Template (SuiteTax) |
| Cash Sale | Standard Cash Sale PDF/HTML Template (SuiteTax) |
| Credit Memo | Standard Credit Memo PDF/HTML Template (SuiteTax) |
| Invoice | Standard Invoice PDF/HTML Template (SuiteTax) |
| Estimate | Standard Quote PDF/HTML Template (SuiteTax) |
| Purchase Order | Standard Purchase Order PDF/HTML Template (SuiteTax) |
| Return Authorization | Standard Return Authorization PDF/HTML Template (SuiteTax) |
| Sales Order | Standard Sales Order PDF/HTML Template (SuiteTax) |

To set up printing transactions with tax information in SuiteTax:

1. Go to Customization > Forms > Transaction Forms.
2. Click the **Customize** link for the standard transaction form. If you already have an existing custom transaction form and you want to set it up to use the SuiteTax advanced print template, click the **Edit** link next to it.
3. For Printing Type, select Advanced.
4. In the **Print Template** and **Email Template** fields, select the advanced print template for SuiteTax.
5. Check the Form is Preferred box.
6. Click **Save**.

You can also customize the predefined advanced print templates for SuiteTax according to your business requirements. You can edit the column names, rearrange or realign the columns, and make other adjustments. For more information, visit SuiteAnswers ID **64720**.

Custom Transaction Form

Save

Cancel

Reset

Move Elements Between Subtabs

Change ID

Actions

NAME *
ST Service Invoice

ID
custform_30_t2204423_770

TYPE
Invoice

PRINTING TYPE ☒ ADVANCED ☐ BASIC

PRINT TEMPLATE
Standard Invoice PD...emplate (SuiteTax)

EMAIL TEMPLATE
Standard Invoice PD...emplate (SuiteTax)

EMAIL MESSAGE TEMPLATE
Default Email Template

DISCLAIMER

ADDRESS

LOGO

COLUMNS WIDTH 9.75 LAYOUT SPACE

☒ ALLOW ADD MULTIPLE
☐ INACTIVE
☒ FORM IS PREFERRED

VAT Countries:

SuiteTax Team (For Demo Use)

Invoice

#8

02/01/2020

Bill To
GEC Electronics PLC.
1542 Main Street
London NW2 4AE
United Kingdom

Ship To
GEC Electronics PLC.
1542 Main Street
London NW2 4AE
United Kingdom

TOTAL

£28,800.00

Due Date: 03/02/2020

| Terms | Date | Tax Point Date | PO # | Sales Rep | Shipping Method |
|--------|------------|----------------|----------|------------|-----------------|
| Net 30 | 02/01/2020 | 02/01/2020 | PO#78656 | Will Clark | |

| Quantity | Item | Rate | Amount | VAT Rate | Tax Amount | Gross Amt |
|----------|--|-----------|------------|----------|------------|------------|
| 5 | 3M Ear muffs | £3,000.00 | £15,000.00 | 20% | £3,000.00 | £18,000.00 |
| 2 | 42 Piece Tool Kit 42 Piece Tool Kit | £4,500.00 | £9,000.00 | 20% | £1,800.00 | £10,800.00 |

| VAT Type | VAT Code | VAT Basis | VAT Rate | VAT Amount |
|----------|----------|------------|--------------|------------|
| VAT_GB | GB_SR | £24,000.00 | 20% | £4,800.00 |
| | | | Total | £4,800.00 |

| | |
|-----------------|------------|
| Subtotal | £24,000.00 |
| VAT | £4,800.00 |
| Total | £28,800.00 |

US:

SuiteTax Team (For Demo Use)

Invoice

#15

01/28/2020

Bill To

Jupiter Technology
18 N Michigan Ave
Chicago IL 60602
United States

Ship To

Jupiter Technology
18 N Michigan Ave
Chicago IL 60602
United States

TOTAL

\$513.74

Due Date: 02/27/2020

| Terms | Date | Tax Point Date | PO # | Sales Rep | Shipping Method |
|--------|------------|----------------|---------|-----------|-----------------|
| Net 30 | 01/28/2020 | 01/28/2020 | PO22334 | Abby Kwan | |

| Quantity | Item | Rate | Amount | Tax Rate | Tax Amount | Gross Amt |
|----------|--|----------|----------|----------|------------|-----------|
| 1 | 3M Ear muffs 3M Ear muffs | \$20.00 | \$20.00 | 7.25% | \$1.45 | \$21.45 |
| 1 | 4-Cell Primary Battery for Dell Latitude E7240 4-Cell Primary Battery for Dell Latitude E7240 | \$95.00 | \$95.00 | 7.25% | \$6.89 | \$101.89 |
| 1 | 42 Piece Tool Kit 42 Piece Tool Kit | \$50.00 | \$50.00 | 7.25% | \$3.63 | \$53.63 |
| 1 | Alkaline AAA Batteries Pack of 24 - Case of 6 Alkaline AAA Batteries Pack of 24 - Case of 6 | \$99.00 | \$99.00 | 7.25% | \$7.18 | \$106.18 |
| 1 | Carpet Floor Matt (48" x 53") Carpet Floor Matt (48" x 53") | \$180.00 | \$180.00 | 7.25% | \$13.05 | \$193.05 |
| 1 | Cell Phone, Tablets, Laptop Repair kit Cell Phone, Tablets, Laptop Repair kit | \$35.00 | \$35.00 | 7.25% | \$2.54 | \$37.54 |

| Tax Type | Tax Code | Tax Basis | Tax Rate | Tax Amount |
|---------------|------------------------------|--------------|----------|----------------|
| US_CITY_US E | US_IL_COOK COUNTY_CITY_USE_1 | \$479.00 | 1% | \$4.79 |
| US_STATE_ USE | US_IL_STATE_USE_1 | \$479.00 | 6.25% | \$29.95 |
| | | Total | | \$34.74 |

Subtotal \$479.00

Tax \$34.74

Total \$513.74

Compliance Text on Reverse Charge on Sales Invoices

Often tax authorities in VAT countries require specific wording to be shown on invoices particularly for Reverse Charge transactions. To set up compliance text in nexus preferences:

1. Go to Setup > Tax > Nexuses.
2. Click **Edit** next to the nexus you want to update.
3. On the **Compliance Text** subtab.
 - In the **Language** column, select a language.
 - In the **Invoice Text** column, enter the text to display as the compliance text in the reverse charge invoice.
4. Click **Save**.

Nexus

Save Cancel Reset Actions

COUNTRY
United Kingdom

STATE/PROVINCE/COUNTY

DESCRIPTION *
United Kingdom

PARENT NEXUS

☐ INACTIVE

☐ USE FULFILLMENT TO MODIFY TAX POINT DATE

TAX AGENCY
HM Revenue & Customs (HMRC) +

Compliance Text

| LANGUAGE * | INVOICE TEXT * |
|-------------------------|--|
| English (International) | VAT Act 1994 Section 55A applies: Customer to pay the VAT to HMRC. |

✓ Add ✕ Cancel + Insert Remove

Save Cancel Reset Actions

To set up compliance text in invoice templates:

- Go to Customization > Forms > Advanced HTML / PDF Forms.
- Click **Customize** next to the form you want to update.
- Scroll to the table where you would like to place the compliance text after:
 - Right-click > Row > Insert Row After
 - Repeat as many times until desired position is obtained.
 - Enter

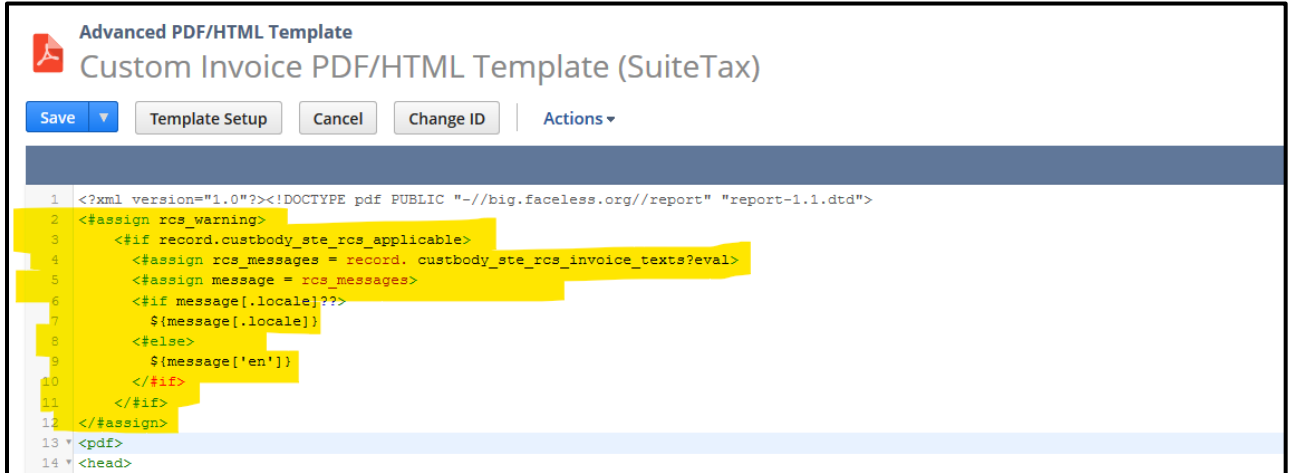
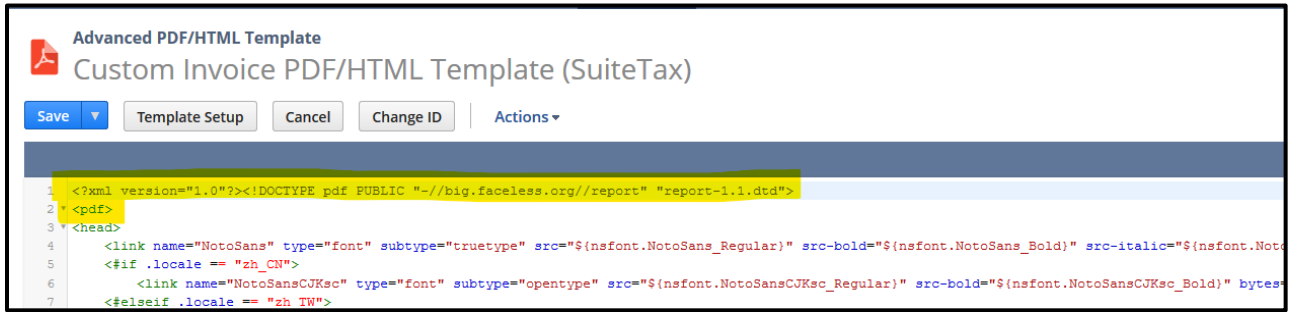
```
{rcs_warning}
```

- Click **Source Code** to enable source code view.
- In the warning message, click **Yes** to accept.
- Copy and paste following XML tags under the initial XML tag and before the PDF tag:

```
<#assign rcs_warning>
  <#if record.custbody_ste_rcs_applicable>
    <#assign rcs_messages = record.custbody_ste_rcs_invoice_texts?eval>
    <#assign message = rcs_messages>
    <#if message[.locale]?>
      ${message[.locale]}
    <#else>
      ${message['en']}
    </#if>
  </#if>
</#assign>
```

- Click **Save**.
- Go to Customization > Forms > Transaction Forms.
- Click **Customize** next to the form you want to update.
- In the **Print Template** field, select the created or customized form.
- Check the **Form Is Preferred** box to have NetSuite automatically select this form when creating a transaction.
- Click **Save**.

Insert code between line 1 and 2:



Sales Invoice Without Reverse Charge:

| | | | | | | | |
|--|---|--|-----------------|---|------------------------|-------------------|------------------|
| SuiteTax Team (For Demo Use) | | | | <h1>Invoice</h1> <h2>#13</h2> <p>12/11/2019</p> | | | |
| Bill To Stemcor 1 Ropemaker Street London EC2Y 9ST United Kingdom | | Ship To Stemcor 1 Ropemaker Street London EC2Y 9ST United Kingdom | | TOTAL <h1>£168.00</h1> <p>Due Date: 01/10/2020</p> | | | |
| Terms | Date | Tax Point Date | PO # | Sales Rep | Shipping Method | | |
| Net 30 | 12/11/2019 | 12/11/2019 | PO3898 | Will Clark | | | |
| Quantity | Item | | Rate | Amount | Tax Rate | Tax Amount | Gross Amt |
| 2 | Wireless Keyboard Wireless Keyboard | | £20.00 | £40.00 | 20% | £8.00 | £48.00 |
| 2 | Wireless Keyboard & Mouse Combo Wireless Keyboard & Mouse Combo | | £50.00 | £100.00 | 20% | £20.00 | £120.00 |
| | | | | | | | |
| Tax Type | Tax Code | Tax Basis | Tax Rate | Tax Amount | | | |
| VAT_GB | GB_SR | £140.00 | 20% | £28.00 | | | |
| | | | Total | £28.00 | | | |
| | | | | | | Subtotal | £140.00 |
| | | | | | | Tax | £28.00 |
| | | | | | | Total | £168.00 |

Sales Invoice With Reverse Charge:

SuiteTax Team (For Demo Use)

Invoice

#29

02/26/2020

Bill To
House of Fraser
Granite House, 31 Stockwell
Street
Glasgow Lanarkshire G1 4RZ
United Kingdom

Ship To
House of Fraser
52 RUE DES FLEURS
LIBOURNE 33500
France

TOTAL

£144.00

Due Date: 03/27/2020

| Terms | Date | Tax Point Date | PO # | Sales Rep | Shipping Method |
|--------|------------|----------------|---------|------------|-----------------|
| Net 30 | 02/26/2020 | 02/26/2020 | PO56787 | Will Clark | |

| Quantity | Item | Rate | Amount | Tax Rate | Tax Amount | Gross Amt |
|----------|---|--------|---------|----------|------------|-----------|
| 3 | Ergonomic Keyboard Ergonomic Keyboard | £40.00 | £120.00 | 0% | £0.00 | £120.00 |
| 3 | Ergonomic mouse pad Ergonomic mouse pad | £8.00 | £24.00 | 0% | £0.00 | £24.00 |

| Tax Type | Tax Code | Tax Basis | Tax Rate | Tax Amount |
|----------------|----------|-----------|----------|------------|
| Reverse Charge | GB_RCS | £144.00 | 0% | £0.00 |
| Total | | | | £0.00 |

| | |
|-----------------|---------|
| Subtotal | £144.00 |
| Tax | £0.00 |
| Total | £144.00 |

VAT Act 1994 Section 55A applies: Customer to pay the VAT to HMRC.

Reports

Standard Reports

Once SuiteTax is enabled, NetSuite has two standard tax reports that are based on Saved Searches, both that are fully customizable:

- Summary Report: Total net amounts and tax amounts by tax code
- Detail Report: provides a list of all tax detail lines

You can customize the views for specific roles as well as for any of your subsidiaries. Customized views are transaction saved searches and can be bundled.

Note that all the reports are now driven off the new **Tax Point Date**. NetSuite now includes two date fields on all taxable transactions.

To access the Standard Tax Reports, go to *Reports > Tax > Standard Tax Report*.

The screenshot shows the 'Tax Report' interface in NetSuite. At the top, there's a 'VIEW' dropdown set to 'Generic Tax Report Detail' and a 'Customize View' button. Below this is a 'FILTERS' section with fields for DATE, FROM, TO, TAX POINT DATE, FROM, TO, and SUBSIDIARY. The main table, titled 'Tax Report', has columns: INTERNAL ID, TRANSACTION TYPE, TRANSACTION DATE, TAX POINT DATE, DOCUMENT NUMBER, ENTITY NAME, NET AMOUNT, NET AMOUNT (FOREIGN CURRENCY), TAX TYPE, TAX CODE, TAX BASIS, TAX RATE, TAX AMOUNT, and TAX AMOUNT (FOREIGN CURRENCY). The table contains several rows of transaction data.

| INTERNAL ID | TRANSACTION TYPE | TRANSACTION DATE | TAX POINT DATE | DOCUMENT NUMBER | ENTITY NAME | NET AMOUNT | NET AMOUNT (FOREIGN CURRENCY) | TAX TYPE | TAX CODE | TAX BASIS | TAX RATE | TAX AMOUNT | TAX AMOUNT (FOREIGN CURRENCY) |
|-------------|------------------|------------------|----------------|-----------------|--------------------------|------------|-------------------------------|----------|----------|-----------|----------|------------|-------------------------------|
| 2708 | Invoice | 12/06/2020 | 12/06/2020 | 67 | Procad | 924.05 | €444.00 | VAT_JE | IE_SR | 444.00 | 23.0% | 212.53 | €102.12 |
| 2542 | Bill | 11/06/2020 | 11/06/2020 | | Cork Trading Co | -965.43 | (€463.88) | VAT_JE | IE_SR | 463.88 | 23.0% | 222.04 | €106.69 |
| 2693 | Invoice | 11/06/2020 | 11/06/2020 | 61 | Rynn Engineering Limited | 1,040.60 | €500.00 | VAT_JE | IE_SR | 500.00 | 23.0% | 239.34 | €115.00 |
| 2705 | Invoice | 11/06/2020 | 11/06/2020 | 66 | The T-Shirt Company | 249.74 | €120.00 | VAT_JE | IE_SR | 120.00 | 23.0% | 57.44 | €27.60 |
| 2714 | Credit Memo | 11/06/2020 | 11/06/2020 | 5 | Energwise Ireland | -2,310.13 | (€1 110.00) | VAT_JE | IE_SR | 1,110.00 | 23.0% | -531.33 | (€255.30) |

The screenshot shows the 'Tax Report' interface in NetSuite, specifically the 'Generic Tax Report Summary' view. It features the same 'FILTERS' section as the detail view. The main table, titled 'Tax Report', has columns: TAX CODE, SUM OF NET AMOUNT, and SUM OF TAX AMOUNT. The table lists various tax codes and their corresponding net and tax amounts.

| TAX CODE | SUM OF NET AMOUNT | SUM OF TAX AMOUNT |
|---------------------------------------|-------------------|-------------------|
| US_NY_HERKIMER COUNTY_COUNTY_SALES_1 | 24.00 | 1.02 |
| US_PA_JNL | 28.00 | 0.00 |
| DE_SR | 64.99 | 12.34 |
| US_OH_STATE_SALES_1 | 115.00 | 6.61 |
| US_OH_KNOX COUNTY_COUNTY_SALES_1 | 115.00 | 1.72 |
| US_CA_STATE_SALES_1 | 125.00 | 7.50 |
| US_CA_SAN MATEO COUNTY_COUNTY_SALES_1 | 125.00 | 1.56 |
| US_CA_SAN MATEO COUNTY_COUNTY_SALES_2 | 125.00 | 2.50 |

The screenshot shows the 'Customize Transaction Search Results' interface in NetSuite. It includes a 'Custom Generic Tax Report Detail' section with buttons for 'Save', 'Cancel', 'Preview', 'New Template', 'More Options', and 'Actions'. Below this is a 'Criteria' section with a 'Results' tab selected. The 'Results' tab shows a table with columns: FIELD, CUSTOM LABEL, and CUSTOM LABEL TRANSLATION. The table lists various fields and their corresponding labels and translations.

| FIELD | CUSTOM LABEL | CUSTOM LABEL TRANSLATION |
|---------------------------|-------------------------------|------------------------------------|
| Type | Transaction Type | German: Transaktionstyp |
| Date | Transaction Date | German: Transaktionsdatum |
| Tax Point Date | Tax Point Date | German: Steuerpunktdatum |
| Document Number | Document Number | German: Dokument Nummer |
| Main Line Name | Entity Name | German: Name der Entität |
| Amount | Net Amount | German: Nettobetrag |
| Amount (Foreign Currency) | Net Amount (Foreign Currency) | German: Nettobetrag (Fremdwährung) |

Localized Country Tax Reports

You will need to install all applicable country tax report bundles. The country tax report bundles that you need to install will vary depending on the countries (nexuses) assigned on the subsidiary records. Before doing the installation, make sure the **Tax Reporting Framework bundle (ID: 237699)** is installed on the account.

Country tax report bundles, including its prerequisite bundles, must be installed in a specific order.

Refer to **Appendix B** for the list of currently available country tax reports, related bundles IDs, and installation order.

Sample Bundles:

| NAME | BUNDLE ID | VERSION | MANAGED | ABSTRACT | ADMIN DOCUMENTATION | STATUS | OWNER |
|--|-----------|---------|---------|--|-------------------------------------|--------|--|
| Tax Reporting Framework | 237699 | 1.01.0 | Yes | Provides the tax reporting framework for all NetSuite SuiteTax and Localization SuiteApps. | | ✓ | NetSuite Platform Solutions Group - Tax Reporting Framework (5170090) |
| EMEA Localization | 303903 | 1.01.2 | Yes | Provides the content that will be used to generate tax reports required in Germany and the United Kingdom. | Admin Documentation | ✓ | NetSuite Platform Solutions Group - EMEA Localization (5888283) |
| United Kingdom Localization | 303970 | 1.02.0 | Yes | Delivers templates so that UK tax reports can be generated and submitted digitally to Her Majesty's Revenue and Customs. | Admin Documentation | ✓ | NetSuite Platform Solutions Group - UK Localization (5888234) |
| SuiteTax Country Tax Reports JAPAC | 303913 | 1.00.3 | Yes | Supplements the SuiteTax Reports SuiteApp with tax reporting localization and report templates for the countries in the JAPAC region. | | ✓ | NetSuite Platform Solutions Group - SuiteTax Country Tax Reports JAPAC (5891573) |
| Belgium Localization | 307195 | 1.01.3 | Yes | | | ✓ | NetSuite Platform Solutions Group - Belgium Localization (5965636) |
| SuiteTax EMEA Audit Files | 303920 | 1.00.0 | Yes | Supplements the SuiteTax Reports SuiteApp with the capability to generate accounting data records and master files for SAF-T compliance. | | ✓ | NetSuite Platform Solutions Group - SuiteTax EMEA Audit Files (5856250) |

NOTE: On the Preview Bundle Install page, confirm that the following actions are applied for each set of conflicting objects:

- In the **Action** column, **Replace Existing Object** is selected.
- In the Preference column, **Replace Data for Conflicting Custom Records and Custom Lists** is selected.

Preview Bundle Install

Cancel

Install Bundle

Name: EMEA Localization

Version: 1.00.2

| BUNDLE CONTENTS | EXISTING OBJECT IN CONFLICT | SCRIPT ID | ACTION | PREFERENCE | INTERNAL ID | LOCK ON INSTALL |
|-------------------------|-----------------------------|--------------------------------------|---|--|-------------|------------------------|
| Custom Fields | | | | | | |
| Item Fields | | | | | | |
| Commodity Code | Commodity Code | custitem_str_commodity_code | <div><div></div><div>Replace Existing Object</div></div> | | 510 | <div><div></div></div> |
| Supplementary Units | Supplementary Units | custitem_str_supplementary_units | <div><div></div><div>Add and Rename</div></div> | <div>Show on Existing Custom Forms</div> | 506 | <div><div></div></div> |
| Supplementary code | Supplementary code | custitem_str_supplementary_unit_code | <div><div></div><div>Add and Rename</div><div>Replace Existing Object</div></div> | <div>Show on Existing Custom Forms</div> | 508 | <div><div></div></div> |
| Transaction Body Fields | | | | | | |

With the Tax Reporting Framework, you can customize a localized tax return using the configurable tax return template. The tax return template is pre-configured according to local requirements by default. You can customize the template by adding a new filter or configuring the existing filters. These filters affect how the bundle selects the transactions to include in the report.

Cases where you need to customize the tax return template are the following:

- You need to add an account where the report retrieves the data.
- You created a custom tax code that must be included on the report.
- You want to add a search filter that is not provided on the default template.

When you customize a tax return template, a **Use Custom Template** switch appears on the Set Up Tax Return page. Disabling this feature reverts the tax return filters to its default setting. Enabling the feature restores your last saved custom template.

To add a filter in the tax return template:

- In NetSuite, go to Setup > Tax Reporting > Tax Returns.
- Click **View** on the report that you want to customize.
- Go to the report label where you want to add a new filter.

The report labels are arranged in order of its appearance on the report. You may also use the report label's box or line number as a guide.

- Click Add Filter.
- Select the report conditions for each filter box:

Tip: You can select multiple report conditions on each filter box. To clear a selection, click the report condition again.

- **Search Type** – This filter determines whether to search for Sales, Purchases, Expenses, or Billable Expenses. To include journal entries in the report, select **Sales** or **Purchases** first, then check the **Use Journals** box.
- **Transaction Types** – This filter determines which type of transaction to include in the report: Cash Refund, Cash Sale, Credit Memo, Invoice, Bill, Bill Credit, or Expense Report.
- **Tax Codes** – Tax codes determine how much tax is applied to each line item on your transaction records. By default, tax codes are selected based on the requirements specific to a field in the tax return.
- **Tax Transaction Types** – This filter determines which type of tax transaction to include in the report: Domestic Purchases, Domestic Sales, Exports, Imports, Intra-Community Purchases, or Intra-Community Sales.
- **Tax Item Types** – This filter determines which tax item to include in the report: Goods or Services. You may also select – **None** – to report items without a tax item type.

- **Tax Reporting Category** – This filter only appears on boxes where classified goods or services must be reported. Select the tax reporting category that identifies the item or select – **None** – to report items without a tax reporting category.
- **Account** – This filter only appears on reports that retrieve data from the chart of account. Using this filter, you can select which account you want to include in the report.
- Review your selected filters in **Your Selections** pane.
- Click **Save**. Otherwise, you can choose to:
 - **Cancel** – cancel your changes and close the filter without saving
 - **Reset** – revert the filters to the last saved selection

To configure a filter in the tax return template:

- In NetSuite, go to Setup > Tax Reporting > Tax Returns.
- Click **View** on the report that you want to customize.
- Go to the report label where you want to add a new filter.

The report labels are arranged in order of its appearance on the report. You may also use the report label's box or line number as a guide.

- Select the new report conditions for each filter box:

Tip: You can select multiple report conditions on each filter box. To clear a selection, click the report condition again.

- **Search Type** – This filter determines whether to search for Sales, Purchases, Expenses, or Billable Expenses. To include journal entries in the report, select **Sales** or **Purchases** first, then check the **Use Journals** box.

- **Transaction Types** – This filter determines which type of transaction to include in the report: Cash Refund, Cash Sale, Credit Memo, Invoice, Bill, Bill Credit, or Expense Report.
- **Tax Codes** – Tax codes determine how much tax is applied to each line item on your transaction records. By default, tax codes are selected based on the requirements specific to a field in the tax return.
- **Tax Transaction Types** – This filter determines which type of tax transaction to include in the report: Domestic Purchases, Domestic Sales, Exports, Imports, Intra-Community Purchases, or Intra-Community Sales.
- **Tax Item Types** – This filter determines which tax item to include in the report: Goods or Services. You may also select – **None** – to report items without a tax item type.
- **Tax Reporting Category** – This filter only appears on boxes where classified goods or services must be reported. Select the tax reporting category that identifies the item or select – **None** – to report items without a tax reporting category.
- **Account** – This filter only appears on reports that retrieve data from the chart of account. Using this filter, you can select which account you want to include in the report.

Review your selected filters in **Your Selections** pane.

Click **Save**. Otherwise, you can choose to:

- **Cancel** – cancel your changes and close the filter without saving
- **Reset** – revert the filters to the last saved selection
- **Delete** – remove the saved filter

Set Up Tax Return: United Kingdom - Periodic VAT return - VAT 100

[Back](#)

Use Custom Template ☒

Value Added Tax Return

Box 1: VAT due in this period on Sales and other outputs

▸ Sales | Invoice, Cash Sale, Credit Memo, Cash Refund | GB_SR, GB_RR | Domestic Sales | Goods, Services

Search Type *
Only one search type can be selected.

Sales

Purchases

Expenses

☐ Use Journals

Transaction Types *

Cash Refund

Cash Sale

Credit Memo

Invoice

Tax Codes *

GB_NL

GB_RCS

GB_RR

GB_SR

Tax Transaction Types *

Domestic Sales

Exports

Intra-Community Sales

Tax Item Types *

- None -

Goods

Services

Your Selections:

- Sales
- Cash Refund, Cash Sale, Credit Memo, Invoice
- GB_RR, GB_SR
- Domestic Sales

[Save](#) [Cancel](#) [Reset](#) [Delete](#)

▸ Purchases | Bill, Bill Credit | GB_SR, RC, GB_RR, RC | Domestic Purchases | Goods

▸ Purchases | Bill, Bill Credit | GB_SR, RC, GB_RR, RC | Intra-Community Purchases, Imports | Services

▸ Sales | Cash Sale, Invoice | GB_RR, GB_SR, GB_ZR | Domestic Sales | Goods, Services

[Add Filter](#)

Roles and Permissions

The following are permissions and permission levels specific to the **SuiteTax Engine**:

| PERMISSION | DESCRIPTION | LEVEL |
|--|---|--------------------------------|
| Define Tax Registrations Format | This permission enables you to define the tax registration number format for different nexuses. | None, View, Create, Edit, Full |
| Tax Schedules | This permission enables you to access the tax schedule information. | None, View, Create, Edit, Full |
| Nexus Setting | <ul style="list-style-type: none">- This permission enables you to access the Nexus Preferences on the nexus record.-The Nexus Setting permission only works if the assigned role also has the Tax Records permission. | None, View, Full |
| US Exemption Certificates | This permission enables you to create and modify Exemption Certificates. | None, View, Create, Edit, Full |
| Item Taxability Rules | This permission enables you to add and modify item taxability rules. | None, View, Create, Edit, Full |

To assign permissions to roles in the SuiteTax Engine:

1. Go to Setup > SuiteTax Engine > Manage SuiteTax Engine Roles.
2. Click Assign SuiteTax Engine Permissions to Role.
3. In the **Role** field, select a role from the list. The roles listed include all standard and custom roles.
4. On the **SuiteTax Engine Permissions** subtab, select a level for each listed permission.
5. Click **Save**.

To change permissions for roles in the SuiteTax Engine:

1. Go to Setup > SuiteTax Engine > Manage SuiteTax Engine Roles.
2. Click **Edit** next to the role you want to update.
3. On the **SuiteTax Engine Permissions** subtab, update the selected level for the permissions listed.
4. Click **Save**.

The following are permissions and permission levels specific to the **Tax Reporting Framework**:

| PERMISSION | DESCRIPTION | PERMISSION LEVELS |
|--|--|-------------------|
| Country Tax Report | This permission enables the user to generate, view, and export tax reports. | Full, None |
| Tax Return Setup | This permission enables the user to view and edit the configuration on the tax return. | Full, View, None |
| Tax Filing | This permission enables the user to submit the UK VAT100 Return to HMRC. | Full, None |
| Country Tax Reports Preferences | This permission enables the user to modify the start date, reporting frequency, and period filters of country tax reports. | Full, View, None |

To assign SuiteTax Reports permissions to a standard or custom role:

1. In NetSuite, go to Setup > Tax Reporting > Manage SuiteTax Reports Roles.
2. On the SuiteTax Reports Roles page, click **Assign SuiteTax Reports Permissions to Role**.
3. On the **Role** dropdown list, select the role that you want to customize.
4. On the **Level** dropdown list, select the permission level that you want to assign to the following SuiteTax Reports Permissions:
 - Country Tax Report
 - Tax Return Setup
 - Tax Filing
 - Country Tax Reports Preferences
5. Click **Save**.

OTHERS HELPFUL TOPICS

US Use Tax (Purchase Tax for US Nexuses Only)

Please be aware of the following items regarding the current US Use Tax (Purchase Tax) capabilities:

- The NetSuite SuiteTax Engine automatically provisions US Use Tax Codes.
- There is no automated tax code lookup for US Use Tax. You must apply such taxes on purchase transaction using the Tax Details Override setting.

- You must create your own reports and searches using the available analytic tools.

Assigning Tax on US Purchase Transactions

To apply taxes on US purchase transactions

1. Users have the option to allow the engine to determine the Nexus, otherwise they can check the box **Nexus Override** and select the appropriate nexus.
2. Check the box **Tax Details Override**. This will be mandatory as the engine do not have any tax determination logic for US Purchases.
3. Select Vendor Tax Reg. Number.
4. Set Tax Point Date, in case it's different from the Transaction Date. To set Tax Point Date manually, check the box **Override**.
5. Set the following Tax Details fields:
 - Tax Details Reference – select the line item to which the purchase tax is applied to.
 - Tax Type – select the Tax Type created earlier for the US Purchase Tax.
 - Tax Code – select the Tax Code created earlier for the US Purchase Tax.
 - Tax Basis – enter amount to which the tax will be calculated from.
 - Tax Rate – enter the applicable tax rate.
 - Tax Amount – enter the calculated tax amount (Tax Basis * Tax Rate)
 - Details – enter memo, as needed.
 - Click Add
6. Do the same steps for the rest of the line items.
7. Hit Save.

The screenshot displays the 'Tax Details' tab in the SuiteTax Engine interface. The form includes the following fields and sections:

- NEXUS:** A dropdown menu set to 'NY'.
- NEXUS OVERRIDE:** An unchecked checkbox.
- SUBSIDIARY TAX REG. NUMBER:** A dropdown menu set to 'US7788994455 (NY, United States)'.
- TAX DETAILS OVERRIDE:** A checked checkbox.
- VENDOR TAX REG. NUMBER:** A dropdown menu set to 'NO1234566'.
- TAX POINT DATE:** A date field set to '8/12/2020'.
- Override:** An unchecked checkbox.
- Taxes:** A section with a 'Clear All Lines' button and a table for adding tax lines.

| TAX DETAILS REFERENCE * | LINE TYPE | NAME | NET AMOUNT | TAX TYPE * | TAX CODE * | TAX BASIS * | TAX RATE * | TAX AMOUNT * | DETAILS |
|-------------------------|-----------|---------------------|------------|------------|------------|-------------|------------|--------------|---------|
| 480_1 | Item | Consulting Services | 100.00 | Use Tax | Use Tax | 100.00 | 10.0% | 10.00 | |

Below the table are buttons for 'OK', 'Cancel', 'Insert', 'Remove', 'Move Up', 'Move Down', 'Move To Top', and 'Move To Bottom'. At the bottom of the form are buttons for 'Save', 'Cancel', 'Reset', 'Preview Tax', 'Recalc', and an 'Actions' dropdown menu.

Withholding Tax Setup (For VAT Countries Only)

Please be aware of the following items regarding the current Withholding Tax capabilities:

- Withholding tax codes are not automatically provisioned. You must set them up manually.
- There are no automatically provisioned reports available for withholding taxes. You must create your own reports and searches using the available analytic tools.
- SuiteTax only supports the accrual basis of tax recognition. For withholding taxes recognized upon payment, you can assign a deferral tax liability/receivables account when you set up tax types. A manual reclassification journal to the actual withholding tax liability or receivables account must be done when the invoice or bill is paid. SuiteTax does not support deferral taxes (taxes posted upon payment).

Below are the setups that need to be done to be able to process withholding taxes in a SuiteTax environment.

Withholding Tax Type

To create a withholding tax type:

1. Go to Setup > Tax > Tax Types > New (Administrator).
2. In the **Country** field, select the country that you are making a tax type for. Only countries where a nexus has been created are available for selection in the list.
3. Enter a name for this tax type.
4. Enter a description for this tax type.
5. Check the box '**Does Not Add To Transaction Total**'. You can set only one of these properties per tax type. After saving the tax type record, you can no longer change the special tax type properties on edit mode.
6. Check the **Inactive** box if you do not want this tax type to be available for use in lists and transactions.
7. Add nexuses and assign tax accounts for each nexus by performing the following steps:
 - In the **Nexus** column, select a nexus.
 - In the **Payables Account** column, select an account to which taxes on sales transactions for the nexus should be posted.
 - In the **Receivables Account** column, select an account to which taxes on purchase transactions for the nexus should be posted.
 - Click **Add**.
 - Repeat the substeps under Step 7 for each nexus that you want to associate with this tax type.
8. Click **Save**.

Tax Type

Save

Cancel

Reset

Actions

COUNTRY

Philippines

NAME *

PH_WHT

DESCRIPTION

Withholding Tax Type

☒ DOES NOT ADD TO TRANSACTION TOTAL
 ☐ POST TO ITEM COST
 ☐ TAX INCLUDED IN NET AMOUNT
 ☐ REVERSE CHARGE
 ☐ REVERSE CHARGE FOR SALES
 ☐ INACTIVE

Accounts

System Notes

| NEXUS * | PAYABLES ACCOUNT | RECEIVABLES ACCOUNT |
|-------------|----------------------------|---------------------------|
| Philippines | Creditable Withholding Tax | Withholding Tax Liability |
| | | |

Add

Cancel

Insert

Remove

Save

Cancel

Reset

Actions

Withholding Tax Codes

To create a withholding tax code:

1. Go to Setup > Tax > Tax Codes > New (Administrator).
2. Enter a name for this tax code.
3. Enter a description for this tax code.
4. Select the withholding tax type for this tax code.
5. Check the **Inactive** box if you do not want this tax code to be available for use in lists and transactions.
6. In the **Tax Rate Type** field, select a tax rate type '**Standard**'.
7. Enter Tax Rate
8. Click **Save**.

Tax Code

Save

Cancel

Reset

Actions

NAME *

WC010-2018

DESCRIPTION

Professional (lawyers, CPAs, engineers, etc.) if gross income for the current year did not exceed P720,000 - Corporate

TAX TYPE *

PH_WHT

☐ INACTIVE

PAYABLES ACCOUNT

1608 Tax on Purchases : Creditable Withh

RECEIVABLES ACCOUNT

2308 Tax Liability : Withholding Tax Liabili

AVAILABLE ON

Both

TAX RATE TYPE

Standard

TAX RATE

10%

Withholding Tax Group

This process is optional, however in certain cases where taxing is always done in combination of Sales/VAT tax and a withholding tax code, creating a Tax group would be beneficial to users.

To create a tax group with both Sales/VAT Tax and Withholding Tax codes:

1. Go to Setup > SuiteTax Engine > Tax Groups.
2. Click New Tax Group.
3. In the **Name** field, enter a name for this tax group.
4. From the **Nexus** list, choose the nexus this tax group will apply to. Only the active nexuses assigned to the account will appear in this list.
5. OPTIONAL: In the Description field, enter a sentence no longer than 500 characters describing this tax group.
6. Choose at least one tax code from the **Tax Codes** list. Here, select the Sales/VAT Tax Code/s and the Withholding Tax Code.
7. Click **Save**.

Tax Group

SaveCancelResetDelete

NAME *

NEXUS *

Philippines

DESCRIPTION

12% VAT plus 10% Withholding Tax

☐ INACTIVE

Tax Codes •

| TAX CODE * | RATE | AVAILABLE ON SALES | AVAILABLE ON PURCHASES |
|-------------|------|--------------------|------------------------|
| PH_SR | 12% | Yes | Yes |
| WC010-2018 | 10% | Yes | Yes |
| <div></div> | | | |

✓ Add

✕ Cancel

+ Insert

🗑 Remove

Withholding Tax: Setting Defaults

A default Tax Group can be set on the Entity record, Tax Schedule, and Nexus record.

To assign a default Tax Group at the Entity record:

1. Go to the entity records list.

- For Customers, go to Lists > Relationships > Customers.
 - For Vendors, go to Lists > Relationships > Vendors.
2. Click **Edit** next to the record you want to update.
 3. Click the **Financial** subtab.
 4. Click the **Tax Registrations** subtab.
 5. Enter information as necessary, with one country per line:
 - In the **Country** column, select a country.
 - In the **Tax Reg. Number** column, enter the tax registration number of the entity in the selected country.
 - (Optional) In the **Exempt** column, check the box to indicate that this entity is exempt from taxes in that particular country.
 - In the **Default Tax Code/Group** column, select the tax group for this registration number. The SuiteTax automatically uses this default tax code or group on the specified entity's transactions, as long as the code or group is compatible with the transaction nexus.
 6. When finished, click **OK** and **Save**.

The screenshot shows the SuiteTax Financial - Tax Registrations subtab. It includes sections for Account Information, Tax Information, and Balance Information. At the bottom, there is a table for Tax Registrations with columns for Country, State, Nexus, Address, Tax Reg. Number, Exempt, Default Tax Code/Group, and Validation. The table contains one entry for the Philippines with tax registration number 111122223333 and default tax code PH_VAT12_WHT10. Below the table are buttons for OK, Cancel, Insert, and Remove.

| Financial - Tax Registrations | | | | | | | |
|---|-------|-------------|---------|------------------|--------------------------|------------------------|------------|
| Account Information | | | | | | | |
| ACCOUNT | | | | END DATE | | | |
| DEFAULT RECEIVABLES ACCOUNT | | | | REMINDER DAYS | | | |
| START DATE | | | | PRIMARY CURRENCY | | | |
| USE SYSTEM PREFERENCE | | | | USD | | | |
| Tax Information | | | | | | | |
| DEFAULT TAX REG. | | | | HOLD | | | |
| Auto | | | | Auto | | | |
| Balance Information | | | | | | | |
| BALANCE | | | | OVERDUE BALANCE | | | |
| 3,081.10 | | | | 3,081.10 | | | |
| DEPOSIT BALANCE | | | | UNBILLED ORDERS | | | |
| 0.00 | | | | 574.87 | | | |
| Currencies • Tax Registrations • Credit Cards | | | | | | | |
| COUNTRY | STATE | NEXUS | ADDRESS | TAX REG. NUMBER | EXEMPT | DEFAULT TAX CODE/GROUP | VALIDATION |
| Philippines | | Philippines | PH | 111122223333 | <input type="checkbox"/> | PH_VAT12_WHT10 | |
| <input type="button" value="OK"/> <input type="button" value="Cancel"/> <input type="button" value="Insert"/> <input type="button" value="Remove"/> | | | | | | | |

To assign a default Tax Group at the Tax Schedule:

1. Go to Setup > SuiteTax Engine > Tax Schedules.
2. Click **New** (or **Edit** if you are editing an existing Tax Schedule).
3. In the **Name** field, enter a name for this Tax Schedule.

4. In the **Description** field, enter a short sentence describing this tax schedule.
5. Under the **Nexus** subtab, complete the table per nexus:
 - In the **Nexus** column, select a nexus to which this tax schedule applies. Only nexuses assigned to use SuiteTax Engine appear in this list.
 - Select the tax group for every transaction type to which this tax schedule applies to.
6. Click the **Items** subtab.
7. Enter additional information as necessary. You can map this tax schedule to a saved search, specific individual items, or both.
 - To add multiple items using the saved search in the **Select Item Saved Search** field, select a saved search from the dropdown.
 - To add specific items to the tax schedule:
 - In the **Item Name Number** column, select an item from the dropdown.
 - Click **Open** to view the item record.
 - Click **Add** to add the item.
 - Continue adding items as necessary.
8. When you have finished, click **Save**.

Tax Schedule

Save

Cancel

Reset

Delete

NAME *

Taxable Services (VAT + WHT)

DESCRIPTION

Services subject to VAT/GST and WHT

Nexuses • Items •

| NEXUS * | DOMESTIC SALES | DOMESTIC PURCHASES | EXPORTS | IMPORTS |
|-------------|----------------|--------------------|---------|---------|
| Philippines | PH_VAT12_WHT10 | PH_VAT12_WHT10 | PH_ZR | PH_ZR |
| <div></div> | | | | |

✓ Add

✕ Cancel

+ Insert

🗑 Remove

Save

Cancel

Reset

Delete

To assign a default Tax Group at the Nexus record:

1. Go to Setup > Tax > Nexuses.
2. Click **Edit** on the applicable nexus.

3. Click on **Default Tax Codes/Tax Groups** tab and assign appropriate tax group per tax transaction type.
4. When you have finished, click **Save**.

Nexus

Save

Cancel

Reset

Actions

COUNTRY

Philippines

STATE/PROVINCE/COUNTY

DESCRIPTION *

Philippines

PARENT NEXUS

☐ INACTIVE

☐ USE FULFILLMENT TO MODIFY TAX POINT DATE

TAX AGENCY

Bureau of Internal Revenue (BIR)

+

Nexus Preferences

Default Tax Codes/Groups

Compliance Text

System Notes

Define a tax code or tax group for each tax transaction type. These will be used as a default for transactions saved for your nexus.

| TAX TRANSACTION TYPE ▲ | GOODS | SERVICES |
|------------------------|-------|----------------|
| DOMESTIC SALES | PH_SR | PH_VAT12_WHT10 |
| DOMESTIC PURCHASES | PH_SR | PH_VAT12_WHT10 |
| EXPORTS | PH_ZR | PH_ZR |
| IMPORTS | PH_ZR | PH_ZR |

Save

Cancel

Reset

Actions

Non-Deductible Standard VAT (For VAT Countries Only)

A VAT-registered business can usually reclaim VAT on purchases and payments made to VAT registered suppliers. However, purchases relating to exempt business activities, non-business activities or for private use are not classed as input tax and cannot be reclaimed. The nondeductible VAT element must be treated as an expense of your business.

This is a case of non-deductible tax where the transaction is charged with standard VAT.

Non-Deductible Standard VAT Tax Type

To create a Non-Deductible Reverse Charge tax type:

1. Go to Setup > Tax > Tax Types > New (Administrator).
2. In the **Country** field, select the country that you are making a tax type for. Only countries where a nexus has been created are available for selection in the list.
3. Enter a name for this tax type.
4. Enter a description for this tax type.
5. Check the box **'Post To Item Cost'**. After saving the tax type record, you can no longer change the special tax type properties on edit mode.

6. Check the **Inactive** box if you do not want this tax type to be available for use in lists and transactions.
7. Add nexuses and assign tax accounts for each nexus by performing the following steps:
 - In the **Nexus** column, select a nexus.
 - In the **Payables Account** column, select an account to which taxes on sales transactions for the nexus should be posted.
 - In the **Receivables Account** column, select an account to which taxes on purchase transactions for the nexus should be posted.
 - Click **Add**.
8. Click **Save**.

The screenshot shows the 'Tax Type' configuration form. At the top, there are 'Save', 'Cancel', and 'Reset' buttons. The form includes fields for 'COUNTRY' (set to 'United Kingdom'), 'NAME' (set to 'VAT_GB_Non-Deductible'), and 'DESCRIPTION' (set to 'Tax Type for United Kingdom (Post To Item Cost)'). To the right, there are checkboxes for 'DOES NOT ADD TO TRANSACTION TOTAL', 'POST TO ITEM COST' (checked), 'TAX INCLUDED IN NET AMOUNT', 'REVERSE CHARGE', 'REVERSE CHARGE FOR SALES', and 'INACTIVE'. Below these fields is a table with three columns: 'NEXUS', 'PAYABLES ACCOUNT', and 'RECEIVABLES ACCOUNT'. The first row shows 'United Kingdom' in the Nexus column and 'VAT on Purchases United Kingdom' in the Receivables Account column. At the bottom, there are 'Add', 'Cancel', 'Insert', and 'Remove' buttons.

Non-Deductible Standard VAT Tax Code

To create a Non-Deductible Reverse Charge tax code

1. Go to Setup > Tax > Tax Codes > New (Administrator).
2. Enter a name for this tax code.
3. Enter a description for this tax code.
4. Select the non-deductible tax type for this tax code.
5. Check the **Inactive** box if you do not want this tax code to be available for use in lists and transactions.
6. In the **Tax Rate Type** field, select a tax rate type '**Standard**'.
7. Enter Tax Rate
8. Click **Save**.

Tax Code ← → List Search Mor

Actions

NAME *

DESCRIPTION

TAX TYPE *

☐ INACTIVE
PAYABLES ACCOUNT

RECEIVABLES ACCOUNT

AVAILABLE ON

TAX RATE TYPE

TAX RATE

Sample Tax Details + GL Impact:

Tax Details

NEXUS
United Kingdom
☐ NEXUS OVERRIDE
TAX TRANSACTION TYPE
Domestic Purchases
SUBSIDIARY TAX REG. NUMBER
GB641407169 (United Kingdom, United Kingdom)

☒ TAX DETAILS OVERRIDE
VENDOR TAX REG. NUMBER
GB766035327
TAX POINT DATE
11/24/2020 ☐ OVERRIDE

Taxes ()

| TAX DETAILS REFERENCE | LINE TYPE | NAME | NET AMOUNT | TAX TYPE | TAX CODE | TAX BASIS | TAX RATE | TAX AMOUNT | DETAILS |
|-----------------------|-----------|--------------|------------|-----------------------|------------|-----------|----------|------------|---------|
| 2725_1 | Item | 3M Ear muffs | 845.67 | VAT_GB_Non-Deductible | GB_SR_PTIC | 845.67 | 20.0% | 169.13 | |

GL Impact

| ACCOUNT | AMOUNT (DEBIT) | AMOUNT (CREDIT) | POSTING | MEMO | NAME | SUBSIDIARY | DEPARTMENT | CLASS | LOCATION |
|--|----------------|-----------------|---------|-----------|-------------|----------------------------|------------|-------|----------|
| 2010 Accounts Payable : Accounts Payable - Trade | | £1,014.80 | Yes | | Baker Tilly | Parent Company : EMEA : UK | | | London |
| 1210 Inventory : Inventory in Stock | £1,014.80 | | Yes | Ear muffs | | Parent Company : EMEA : UK | | | London |

Non-Deductible Reverse Charge (For VAT Countries Only)

This is a case of non-deductible tax where the transaction is qualified under Reverse Charge mechanism.

Non-Deductible Reverse Charge Tax Type

To create a Non-Deductible Reverse Charge tax type:

1. Go to Setup > Tax > Tax Types > New (Administrator).
2. In the **Country** field, select the country that you are making a tax type for. Only countries where a nexus has been created are available for selection in the list.
3. Enter a name for this tax type.

4. Enter a description for this tax type.
5. Check the boxes '**Post To Item Cost**' and '**Reverse Charge**'. After saving the tax type record, you can no longer change the special tax type properties on edit mode.
6. Check the **Inactive** box if you do not want this tax type to be available for use in lists and transactions.
7. Add nexuses and assign tax accounts for each nexus by performing the following steps:
 - In the **Nexus** column, select a nexus.
 - In the **Payables Account** column, select an account to which taxes on sales transactions for the nexus should be posted.
 - In the **Receivables Account** column, select an account to which taxes on purchase transactions for the nexus should be posted.
 - Click **Add**.
8. Click **Save**.

Tax Type List Search

Save

Cancel

Reset

Actions

COUNTRY

United Kingdom

NAME *

VAT_GB_RC_Non-Deductible

DESCRIPTION

Reverse Charge Tax Type for United Kingdom (Post To Item Cost)

☐ DOES NOT ADD TO TRANSACTION TOTAL
☒ POST TO ITEM COST
☐ TAX INCLUDED IN NET AMOUNT
☒ REVERSE CHARGE
☐ REVERSE CHARGE FOR SALES
☐ INACTIVE

Accounts System Notes

| NEXUS * | PAYABLES ACCOUNT * | RECEIVABLES ACCOUNT * |
|----------------|-----------------------------|---------------------------------|
| United Kingdom | VAT on Sales United Kingdom | VAT on Purchases United Kingdom |
| | | |

✓ Add

✕ Cancel

+ Insert

🗑 Remove

Non-Deductible Reverse Charge Tax Code

To create a Non-Deductible Reverse Charge tax code

1. Go to Setup > Tax > Tax Codes > New (Administrator).
2. Enter a name for this tax code.
3. Enter a description for this tax code.
4. Select the non-deductible tax type for this tax code.
5. Check the **Inactive** box if you do not want this tax code to be available for use in lists and transactions.
6. In the **Tax Rate Type** field, select a tax rate type '**Standard**'.
7. Enter Tax Rate
8. Click **Save**.

Tax Code

Actions

NAME *

DESCRIPTION

TAX TYPE *

☐ INACTIVE
PAYABLES ACCOUNT

RECEIVABLES ACCOUNT

AVAILABLE ON

TAX RATE TYPE

TAX RATE

Sample Tax Details + GL Impact:

Tax Details

NEXUS
United Kingdom
☐ NEXUS OVERRIDE
TAX TRANSACTION TYPE
Intra-Community Purchases
SUBSIDIARY TAX REG. NUMBER
GB641407169 (United Kingdom, United Kingdom)

☒ TAX DETAILS OVERRIDE
VENDOR TAX REG. NUMBER
DE307295466
TAX POINT DATE
05/07/2020 ☐ OVERRIDE

| TAX DETAILS REFERENCE | LINE TYPE | NAME | NET AMOUNT | TAX TYPE | TAX CODE | TAX BASIS | TAX RATE | TAX AMOUNT | DETAILS |
|-----------------------|-----------|--------------|------------|--------------------------|---------------|-----------|----------|------------|---------|
| 2318_1 | Item | 3M Ear muffs | 1,000.00 | VAT_GB_RC_Non-Deductible | GB_SR_RC_PTIC | 1,000.00 | 20.0% | 200.00 | |

GL Impact

| ACCOUNT | AMOUNT (DEBIT) | AMOUNT (CREDIT) | POSTING | MEMO | NAME | SUBSIDIARY | DEPARTMENT | CLASS | LOCATION |
|---|----------------|-----------------|---------|---------------|--|-------------------------------|------------|-------|----------|
| 2010 Accounts Payable ; Accounts Payable - Trade | | £1,000.00 | Yes | | Baker Tilly | Parent Company : EMEA : UK | | | Reading |
| 1210 Inventory ; Inventory in Stock | £1,200.00 | | Yes | Ear muffs | | Parent Company : EMEA : UK | | | Reading |
| GB_002 VAT on Sales United Kingdom | | £200.00 | Yes | GB_SR_RC_PTIC | HM Revenue & Customs (HMRC) : HM Revenue & Customs (HMRC) (UK) (20191203-102756) | Parent Company : EMEA : UK | | | Reading |

CSV Supported Tax Records and Transactions

CSV Supported Tax records

CSV import is supported for the following custom record type imports:

- STE Tax Exemption Certificate [US Exemption Certificates]
- Exempt Certificate Items Binding [US Exemption Certificates: Items]
- STE Item Taxation Rules [Non-taxability Rules]
- STE Nexus Compliance Text [Nexus: Compliance Text tab]
- STE Nexus Default Tax Codes [Nexus: Default Tax Codes/Groups tab]
- STE Nexus Preferences [Nexus: Nexus Preferences]
- STE Roles And Permissions [Manage SuiteTax Engine Roles]
- STE Tax Group [Tax Group]
- STE Tax Group Line [Tax Group: Tax Codes]
- STE Tax Schedule [Tax Schedules]
- STE Tax Schedule Body [Tax Schedules: Nexuses]

CSV Supported Transactions

CSV import of tax details is supported for the following transaction type imports:

- Cash Sale Import
- Credit Card Charge Import
- Credit Card Refund Import
- Credit Memo Import
- Estimate Import
- Invoice Import
- Opportunity Import
- Purchase Order Import
- Return Authorization Import
- Sales Order Import
- Vendor Bill Import
- Vendor Credit Import
- Vendor Return Authorization Import
- Expense Report Import (Import Type = Employees)

Transactions: Single File Import

If there's only one (1) Tax Code applied to each Line Item, you can use a single file import. Please see below sample Import File, Import Mapping, and Imported Tax Details.

| G | H | I | J | K | L | M | N | O | P | Q | R | S | T |
|------------------|----------------|----------------------|----------------|---------------------|----------|-------|-----------------------|----------------|---------------------|-----------|----------|------------|-----------------------|
| Nexus | Nexus Override | Tax Details Override | Tax Point Date | Item | Quantity | Rate | Tax Details Reference | Tax Type | Tax Code | Tax Basis | Tax Rate | Tax Amount | Tax Details Reference |
| United States NY | TRUE | TRUE | | 3M Ear muffs | 10 | 23.00 | Line_001 | US_STATE_SALES | US_NY_STATE_SALES_2 | 230.00 | 4.50% | 10.35 | Line_001 |
| United States NY | TRUE | TRUE | | Ergonomic Keyboard | 10 | 33.00 | Line_002 | US_NL | US_NY_NL | 330.00 | 0.00% | 0.00 | Line_002 |
| United States NY | TRUE | TRUE | | Ergonomic mouse pad | 10 | 43.00 | Line_003 | US_NL | US_NY_NL | 430.00 | 0.00% | 0.00 | Line_003 |

Field Mapping

Your Fields

SuiteTax_Invoice Import_Single_File.csv

- Invoice #
- Customer
- Date
- Due Date
- Memo
- Location
- Nexus
- Nexus Override
- Tax Details Override
- Tax Point Date
- Item
- Quantity
- Rate
- Tax Details Reference
- Tax Type
- Tax Code
- Tax Basis
- Tax Rate
- Tax Amount
- Tax Details Reference

| | | |
|-----------------------|---|---|
| Memo | ↔ | Invoice : Memo |
| Nexus | ↔ | Invoice : Nexus |
| Tax Details Override | ↔ | Invoice : Tax Details Override |
| Tax Point Date | ↔ | Invoice : Tax Point Date |
| Nexus Override | ↔ | Invoice : Nexus Override |
| Date | ↔ | Invoice : Date (Req) |
| Invoice # | ↔ | Invoice : Invoice # |
| Item | ↔ | Invoice Items : Item |
| Custom | ↔ | Invoice Items : Price Level |
| Quantity | ↔ | Invoice Items : Quantity |
| Rate | ↔ | Invoice Items : Rate |
| Tax Details Reference | ↔ | Invoice Items : Tax Details Reference |
| Tax Amount | ↔ | Invoice Taxes : Tax Amount (Req) |
| Tax Basis | ↔ | Invoice Taxes : Tax Basis (Req) |
| Tax Code | ↔ | Invoice Taxes : Tax Code |
| Tax Details Reference | ↔ | Invoice Taxes : Tax Details Reference (Req) |
| Tax Rate | ↔ | Invoice Taxes : Tax Rate (Req) |
| Tax Type | ↔ | Invoice Taxes : Tax Type |

NetSuite Fields

Invoice

Invoice Items

- Amount
- Description
- Exclude Item from Rate Request
- Item
- Order Line
- Price Level
- Quantity
- Rate
- Statistical value
- Tax Details Reference
- Tax Reporting Category

Invoice Taxes

- Details
- Tax Amount (Req)
- Tax Basis (Req)
- Tax Code
- Tax Details Reference (Req)
- Tax Rate (Req)
- Tax Type

Invoice - Billing Address

Invoice - Shipping Address

| Items | Shipping | Billing | Accounting | Tax Details | Communication | Related Records | System Information | GL Impact | Tax Reporting |
|---|----------|---------|------------|--------------------|---|-----------------|--------------------|-----------|---------------|
| NEXUS United States NY <input checked="" type="checkbox"/> NEXUS OVERRIDE | | | | | <input checked="" type="checkbox"/> TAX DETAILS OVERRIDE CUSTOMER TAX REG. NUMBER # TAX POINT DATE 02/28/2020 <input type="checkbox"/> OVERRIDE | | | | |
| SUBSIDIARY TAX REG. NUMBER 849332677 (United States NY, United States) | | | | | | | | | |

| Taxes • | | | | | | | | | |
|-----------------------|-----------|---------------------|------------|----------------|---------------------|-----------|----------|------------|---------|
| TAX DETAILS REFERENCE | LINE TYPE | NAME | NET AMOUNT | TAX TYPE | TAX CODE | TAX BASIS | TAX RATE | TAX AMOUNT | DETAILS |
| 1091_1 | Item | 3M Ear muffs | 230.00 | US_STATE_SALES | US_NY_STATE_SALES_2 | 230.00 | 4.5% | 10.35 | |
| 1091_4 | Item | Ergonomic Keyboard | 330.00 | US_NL | US_NY_NL | 330.00 | 0.0% | 0.00 | |
| 1091_7 | Item | Ergonomic mouse pad | 430.00 | US_NL | US_NY_NL | 430.00 | 0.0% | 0.00 | |

Transactions: Multiple File Import

If there's more than one (1) Tax Code applied to each Line Item, you need to use a multiple-file import. Please see below sample Import File (Primary, Items, Taxes), Import Mapping, and Imported Tax Details.

| A | B | C | D | E | F | G | H | I | J |
|-----------|-----------|------------|------------|--------------------------------------|----------|------------------|----------------|----------------------|----------------|
| Invoice # | Customer | Date | Due Date | Memo | Location | Nexus | Nexus Override | Tax Details Override | Tax Point Date |
| INV_001 | KMCe Corp | 02/28/2020 | 03/28/2020 | Test Invoice Import (w/ Tax Details) | New York | United States NY | TRUE | TRUE | |

| A | B | C | D | E | F | G | H | I | J |
|-----------|---------------------|----------|-------|-----------------------|---|---|---|---|---|
| Invoice # | Item | Quantity | Rate | Tax Details Reference | | | | | |
| INV_001 | 3M Ear muffs | 10.00 | 23.00 | Line_001 | | | | | |
| INV_001 | Ergonomic Keyboard | 10.00 | 33.00 | Line_002 | | | | | |
| INV_001 | Ergonomic mouse pad | 10.00 | 43.00 | Line_003 | | | | | |

| A | B | C | D | E | F | G | H | I | J |
|-----------|-----------------|--------------------------------------|-----------|----------|------------|-----------------------|---|---|---|
| Invoice # | Tax Type | Tax Code | Tax Basis | Tax Rate | Tax Amount | Tax Details Reference | | | |
| INV_001 | US_COUNTY_SALES | US_NY_NEW YORK COUNTY_COUNTY_SALES_1 | 230.00 | 4.50% | 10.35 | Line_001 | | | |
| INV_001 | US_COUNTY_SALES | US_NY_NEW YORK COUNTY_COUNTY_SALES_2 | 230.00 | 3.75% | 8.63 | Line_001 | | | |
| INV_001 | US_STATE_SALES | US_NY_STATE_SALES_2 | 230.00 | 4.00% | 9.20 | Line_001 | | | |
| INV_001 | US_COUNTY_SALES | US_NY_NEW YORK COUNTY_COUNTY_SALES_1 | 330.00 | 4.50% | 14.85 | Line_002 | | | |
| INV_001 | US_COUNTY_SALES | US_NY_NEW YORK COUNTY_COUNTY_SALES_2 | 330.00 | 3.75% | 12.38 | Line_002 | | | |
| INV_001 | US_STATE_SALES | US_NY_STATE_SALES_2 | 330.00 | 4.00% | 13.20 | Line_002 | | | |
| INV_001 | US_COUNTY_SALES | US_NY_NEW YORK COUNTY_COUNTY_SALES_1 | 430.00 | 4.50% | 19.35 | Line_003 | | | |
| INV_001 | US_COUNTY_SALES | US_NY_NEW YORK COUNTY_COUNTY_SALES_2 | 430.00 | 3.75% | 16.13 | Line_003 | | | |
| INV_001 | US_STATE_SALES | US_NY_STATE_SALES_2 | 430.00 | 4.00% | 17.20 | Line_003 | | | |

Scan & Upload CSV File

IMPORT TYPE

Transactions

Choose the category of data to import.

RECORD TYPE

Invoice

Choose the record type of data to import.

CHARACTER ENCODING

Western (Windows 1252)

Choose another character encoding format if you use an International or Macintosh version of Microsoft Excel, or if you typically use special characters.

CSV COLUMN DELIMITER

Comma

Select the symbol to be used as a column separator in the CSV files you import. This setting overrides the column separator preference specified at Home > Set Preferences.

CSV File(s)

☐ ONE FILE TO UPLOAD

☒ MULTIPLE FILES TO UPLOAD

Choose whether to import data from a single file or multiple files, and click the Select button(s) to browse to the file(s) to be uploaded.

Primary File - Invoice

Select...

SuiteTax_Invoice Import_Primary.csv

✕ REMOVE

Linked File (Optional) - Invoice Items

Select...

SuiteTax_Invoice Import_Items.csv

✕ REMOVE

Linked File (Optional) - Invoice Taxes

Select...

SuiteTax_Invoice Import_Taxes.csv

✕ REMOVE

Linked File (Optional) - Invoice - Billing Address

Select...

Linked File (Optional) - Invoice - Shipping Address

Select...

File Mapping

Define the links between your primary file and its linked files by selecting a key column for each file.

PRIMARY FILE KEY COLUMN

Invoice #

Specify the primary import file column for linked files to reference when creating subrecords. It can be a name, number, or other unique internal reference.

Record Type

Invoice Items (Linked File)

File Name

SuiteTax_Invoice Import_Items.csv

Column

Invoice #

Invoice Taxes (Linked File)

SuiteTax_Invoice Import_Taxes.csv

Invoice #

Field Mapping

Get help with creating

Your Fields

- Date
- Due Date
- Memo
- Location
- Nexus
- Nexus Override
- Tax Details Override
- Tax Point Date
- SuiteTax_Invoice Import_Items.csv**
 - Invoice #
 - Item
 - Quantity
 - Rate
 - Tax Details Reference
 - Amount
- SuiteTax_Invoice Import_Taxes.csv**
 - Invoice #
 - Tax Type
 - Tax Code
 - Tax Basis
 - Tax Rate
 - Tax Amount
 - Tax Details Reference

NetSuite Fields

- Invoice**
 - Invoice Items**
 - Amount
 - Description
 - Exclude Item from Rate Request
 - Item
 - Order Line
 - Price Level
 - Quantity
 - Rate
 - Statistical value
 - Tax Details Reference
 - Tax Reporting Category
 - Invoice Taxes**
 - Details
 - Tax Amount (Req)
 - Tax Basis (Req)
 - Tax Code
 - Tax Details Reference (Req)
 - Tax Rate (Req)
 - Tax Type
 - Invoice - Billing Address**
 - Invoice - Shipping Address**

Field Mapping Table:

| Field | Mapping | Field |
|-----------------------|---------|---|
| Memo | ↔ | Invoice : Memo |
| Nexus | ↔ | Invoice : Nexus |
| Tax Details Override | ↔ | Invoice : Tax Details Override |
| Tax Point Date | ↔ | Invoice : Tax Point Date |
| Nexus Override | ↔ | Invoice : Nexus Override |
| Date | ↔ | Invoice : Date (Req) |
| Invoice # | ↔ | Invoice : Invoice # |
| Amount | ↔ | Invoice Items : Amount |
| Item | ↔ | Invoice Items : Item |
| Custom | ↔ | Invoice Items : Price Level |
| Quantity | ↔ | Invoice Items : Quantity |
| Rate | ↔ | Invoice Items : Rate |
| Tax Details Reference | ↔ | Invoice Items : Tax Details Reference |
| Tax Amount | ↔ | Invoice Taxes : Tax Amount (Req) |
| Tax Basis | ↔ | Invoice Taxes : Tax Basis (Req) |
| Tax Code | ↔ | Invoice Taxes : Tax Code |
| Tax Details Reference | ↔ | Invoice Taxes : Tax Details Reference (Req) |
| Tax Rate | ↔ | Invoice Taxes : Tax Rate (Req) |
| Tax Type | ↔ | Invoice Taxes : Tax Type |

Items Shipping Billing Accounting **Tax Details** Communication Related Records System Information GL Impact Tax Reporting

NEXUS
United States NY
☒ NEXUS OVERRIDE
SUBSIDIARY TAX REG. NUMBER
849332677 (United States NY, United States)

☒ TAX DETAILS OVERRIDE
CUSTOMER TAX REG. NUMBER

TAX POINT DATE
02/28/2020 ☐ OVERRIDE

Taxes

| TAX DETAILS REFERENCE | LINE TYPE | NAME | NET AMOUNT | TAX TYPE | TAX CODE | TAX BASIS | TAX RATE | TAX AMOUNT | DETAILS |
|-----------------------|-----------|---------------------|------------|-----------------|--------------------------------------|-----------|----------|------------|---------|
| 1591_1 | Item | 3M Ear muffs | 230.00 | US_COUNTY_SALES | US_NY_NEW YORK COUNTY_COUNTY_SALES_1 | 230.00 | 4.5% | 10.35 | |
| 1591_1 | Item | 3M Ear muffs | 230.00 | US_COUNTY_SALES | US_NY_NEW YORK COUNTY_COUNTY_SALES_2 | 230.00 | 3.75% | 8.63 | |
| 1591_1 | Item | 3M Ear muffs | 230.00 | US_STATE_SALES | US_NY_STATE_SALES_2 | 230.00 | 4.0% | 9.20 | |
| 1591_4 | Item | Ergonomic Keyboard | 330.00 | US_COUNTY_SALES | US_NY_NEW YORK COUNTY_COUNTY_SALES_1 | 330.00 | 4.5% | 14.85 | |
| 1591_4 | Item | Ergonomic Keyboard | 330.00 | US_COUNTY_SALES | US_NY_NEW YORK COUNTY_COUNTY_SALES_2 | 330.00 | 3.75% | 12.38 | |
| 1591_4 | Item | Ergonomic Keyboard | 330.00 | US_STATE_SALES | US_NY_STATE_SALES_2 | 330.00 | 4.0% | 13.20 | |
| 1591_7 | Item | Ergonomic mouse pad | 430.00 | US_COUNTY_SALES | US_NY_NEW YORK COUNTY_COUNTY_SALES_1 | 430.00 | 4.5% | 19.35 | |
| 1591_7 | Item | Ergonomic mouse pad | 430.00 | US_COUNTY_SALES | US_NY_NEW YORK COUNTY_COUNTY_SALES_2 | 430.00 | 3.75% | 16.13 | |
| 1591_7 | Item | Ergonomic mouse pad | 430.00 | US_STATE_SALES | US_NY_STATE_SALES_2 | 430.00 | 4.0% | 17.20 | |

APPENDIX A: SUITETAX COUNTRY TAX REPORTS

SuiteTax Country Tax Reports & Bundles

Here are the available country tax reports and its associated bundles. (**SA 88865**). Before installing any country tax report bundles, make sure the **Tax Reporting Framework** bundle (**237699**) is installed in the account first.

USA, Canada and Mexico

| COUNTRY | TAX REPORTS AVAILABLE | REQUIRED BUNDLES/SUITEAPPS |
|---------|--|--|
| USA | <ul style="list-style-type: none">• Sales Tax Liability by Tax Item Report• Sales Tax Liability by Tax Agency Report• Sales Tax on Sales Summary Report• Sales Tax on Sales Detail Report• Sales Tax Analysis Report | Available from the SuiteApps Marketplace: <ul style="list-style-type: none">• Localization Assistant• US Sales Tax Reports |
| Canada | Canada GST Report: GST34 Worksheet | Available from the SuiteApps Marketplace <ul style="list-style-type: none">• Localization Assistant• Canada Sales Tax Reports |
| Mexico | Mexico Audit Files: Electronic Accounting Files <ul style="list-style-type: none">• Mexico Chart of Accounts• Mexico Trial Balance• Mexico Journal• Mexico Auxiliary Report of Accounts | Available from the NetSuite Repository: <ul style="list-style-type: none">• Mexico Localization (ID:272999) |

Latam Countries

| COUNTRY | TAX REPORTS AVAILABLE | REQUIRED BUNDLES/SUITEAPPS |
|----------|--|---|
| Brazil | <p>Tax Reports</p> <ul style="list-style-type: none"> • Inbound Goods Book • Outbound Goods Book • Provided Services Book • Received Services Book • Simples Nacional Assessment (PGDAS) <p>Tax Assessment Reports</p> <ul style="list-style-type: none"> • IPI • ICMS • ISS • PIS and COFINS • IRPJ and CSLL <p>Statutory Reports</p> <ul style="list-style-type: none"> • ECD • ECF • EFD ICMS IPI • EFD Contribuições | <p>Available from the SuiteApps Marketplace:</p> <ul style="list-style-type: none"> • SuiteTax Latam Engine • Brazil Localization <ul style="list-style-type: none"> • Brazil Reports |
| Colombia | <p>Magnetic Media Reports</p> <p>1001 - Account and withholding payments and deposits</p> <p>1003 - Withholding at the source practiced</p> <p>1005 - Deductible VAT tax</p> <p>1006 - Generated VAT tax</p> <p>1007 - Received income</p> <p>1008 - Accounts receivable balance</p> <p>1009 - Accounts payable balance</p> | <p>Available from the SuiteApps Marketplace:</p> <ul style="list-style-type: none"> • SuiteTax Latam Engine • Colombia Localization |

EMEA

| COUNTRY | TAX REPORTS AVAILABLE | REQUIRED BUNDLES/SUITEAPPS |
|-------------|--|---|
| Belgium | <ul style="list-style-type: none"> Periodic VAT Return 625 Annual Client Listing 725 Belgium Intrastat Report Belgium EC Sales List | Available from the NetSuite Repository: <ul style="list-style-type: none"> EMEA Localization (ID:303903) Belgium Localization (ID:307195) |
| France | <ul style="list-style-type: none"> Periodic VAT Return CA3 Declaration of Exchange of Goods (DEB) Fichier d'Ecritures Comptables (FEC) in France Localization | Available from the NetSuite Repository: <ul style="list-style-type: none"> EMEA Localization (ID:303903) France Localization (ID:143437) |
| Germany | <ul style="list-style-type: none"> Germany Periodic VAT Return - USt 1A Germany Intrastat Report Germany Recapitulative Statement Germany Audit Files: GoBD Data Extract | Available from the NetSuite Repository: <ul style="list-style-type: none"> EMEA Localization (ID:303903) Germany Localization (ID:255470) |
| Ireland | <ul style="list-style-type: none"> Ireland VAT Report: Periodic VAT Return – VAT3 | Available from the NetSuite Repository: <ul style="list-style-type: none"> EMEA Localization (ID:303903) Ireland Localization (ID:325736) |
| Netherlands | <ul style="list-style-type: none"> Netherlands Periodic VAT Return OB69 Netherlands Intrastat Report Netherlands EC Sales List Netherlands Tax Audit Files (XAF) | Available from the NetSuite Repository: <ul style="list-style-type: none"> EMEA Localization (ID:303903) Netherlands Localization (ID:307509) |

| | | |
|----------------|---|--|
| Sweden | <ul style="list-style-type: none"> Sweden VAT Report: Return Form SKV4700 Sweden Intrastat Report Sweden EC Sales List | Available from the NetSuite Repository: <ul style="list-style-type: none"> EMEA Localization (ID:303903) Sweden Tax Reports SuiteApp (ID:307400) |
| United Kingdom | <ul style="list-style-type: none"> Periodic VAT return – VAT100 United Kingdom Intrastat Report United Kingdom EC Sales List | Available from the NetSuite Repository: <ul style="list-style-type: none"> EMEA Localization (ID:303903) United Kingdom Localization (ID:303970) |

JAPAC

| COUNTRY | TAX REPORTS AVAILABLE | REQUIRED BUNDLES/SUITEAPPS |
|-------------|---|---|
| Australia | <ul style="list-style-type: none"> Australia GST Report: Business Activity Statement | Available from the NetSuite Repository: <ul style="list-style-type: none"> SuiteTax Country Tax Reports APAC (ID:303913) |
| India | <ul style="list-style-type: none"> India Goods and Services Tax (GST) Reporting Tax Deduction at Source (TDS) Reporting | Available from the NetSuite Repository: <ul style="list-style-type: none"> India Localization SuiteTax Engine (ID: 400562) India Localization SuiteTax Reports (ID: 255126) |
| New Zealand | <ul style="list-style-type: none"> GST Return 101A | Available from the NetSuite Repository: <ul style="list-style-type: none"> SuiteTax Country Tax Reports APAC (ID:303913) |
| Philippines | <ul style="list-style-type: none"> Philippines VAT Report: Monthly Return Form 2550M Philippines VAT Report: Quarterly Return Form 2500Q Philippines VAT Report: Quarterly Summary | Available from the NetSuite Repository: <ul style="list-style-type: none"> SuiteTax Country Tax Reports APAC (ID:303913) |

| | Lists of Sales and Purchases | |
|-----------|--|--|
| Singapore | <ul style="list-style-type: none"> Singapore GST F5 Return Singapore IRAS Audit File | Available from the SuiteApps Marketplace: <ul style="list-style-type: none"> Singapore Localization |

APPENDIX B: COUNTRIES SUPPORTED FOR TAX RATE UPDATES*

US and US Territories

US sales and use tax rates database covering general merchandise product categories; excludes any industry specific rates.

International

Basic intra-country VAT and GST rates, if applicable, for international countries; non industry specific.

| COUNTRIES | | |
|------------|------------------|--------------------|
| Albania | Georgia | New Zealand |
| Algeria | Germany | Nigeria |
| Andorra | Ghana | Norway |
| Argentina | French Polynesia | Pakistan |
| Armenia | Greece | Panama |
| Australia | Guatemala | Papua New Guinea |
| Austria | Honduras | Paraguay |
| Azerbaijan | Hungary | Peru |
| Bahamas | Iceland | Philippines |
| Bangladesh | India | Poland |
| Barbados | Indonesia | Portugal |
| Belarus | Ireland | Romania |
| Belgium | Isle Of Man | Russian Federation |

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|------------------------------------|--|----------------------------|
| Belize | Israel | Rwanda |
| Bolivia | Italy | Saudi Arabia |
| Bosnia And Herzegovina | Japan | Serbia |
| Botswana | Jersey | Seychelles |
| Bulgaria | Jordan | Singapore |
| Canada (Includes Provincial Taxes) | Kazakhstan | Slovak Republic (Slovakia) |
| Chile | Kenya | Slovenia |
| China, People's Republic Of | Korea (South), Republic Of South Korea | South Africa |
| Colombia | Latvia | Spain |
| Cook Islands | Lebanon | Sweden |
| Costa Rica | Liechtenstein | Switzerland |
| Croatia (Hrvatska) | Lithuania | Tanzania |
| Cyprus | Luxembourg | Thailand |
| Czech Republic | Macedonia | Tunisia |
| Denmark | Malaysia | Turkey |
| Dominican Republic | Malta | Ukraine |
| Ecuador | Mauritius | United Kingdom |
| Egypt | Mexico | Uruguay |
| El Salvador | Moldova, Republic Of | Uzbekistan |
| Equatorial Guinea | Monaco | Vanuatu |
| Estonia | Montenegro | Venezuela |
| Ethiopia | Morocco | Vietnam |
| Faroe Islands | Namibia | Zambia |
| Finland | Netherlands | Zimbabwe |
| France | Netherlands Antilles | |

** NetSuite's monthly tax rates are powered by CCH® SureTax® from Wolters Kluwer*

APPENDIX C: FAQs

| QUESTION | ANSWER |
|--|--|
| Are there any license fees or cost for SuiteTax? | <p>There are no license fees for the NetSuite owned tax engines (SuiteTax Engine, India GST Engine and Latam Engine). There will be implementation costs charged by NetSuite consultants or external partners/consultants.</p> <p>Our SDN SuiteTax partners will have their own pricing structure if you subscribe to their tax engine (implementation and/or transaction based fees. Contact details can be found on the Suiteapps.com web page or your NetSuite account manager.</p> |
| Can I have SuiteTax provisioned to both Sandbox and Production? | <p>Given that SuiteTax is a non-reversible feature, we encourage customers to configure and test SuiteTax extensively in a sandbox environment first.</p> |
| How long does it take to implement SuiteTax? | <p>This varies per account. Factors that affect implementation include (but are not limited to):</p> <ul style="list-style-type: none">- # of entities- # of subsidiaries- # of nexuses- # of items- # of Non-taxability Rules and Exemption Certificates (For US)- # of Tax Schedules (For VAT Countries)- Volume of transactions |
| Are there any product limitations and if so where can I find the information | <p>All known features that are not available or compatible yet can be found in the Help Center topic, <u>SuiteTax Known Limitations</u>.</p> |

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| What is the recommended timing to stop using Legacy Tax and start using SuiteTax? Do I have to migrate at the end of the month, quarter or year? | Depends on each customer and their subsidiaries. You should consider end of an accounting month or after end of a tax period. |
| Is there any expected downtime during migration? | Currently yes, specific downtime depends on account size and can and should be tested on a sandbox. For production accounts we advise this to be done over a weekend. |
| If I enable SuiteTax, can I abort the migration or disable it later? | No, it is one-way process. That is why the sandbox testing is highly recommended. |
| I tested SuiteTax in a sandbox but decided not to migrate to SuiteTax in production. What happens? | Request a refresh to the sandbox account - it will revert to same state as your production account. |
| When will Legacy Tax no longer be available to newly-provisioned customer accounts? | Right now customers have a choice between Legacy tax and SuiteTax depending on what countries they operate in or localization bundles/SuiteApps that are SuiteTax compatible. Our recommendation is for new accounts to have SuiteTax. |
| How long will the Legacy Tax be supported for? | Legacy tax is being supported and maintained for compliance only. No new tax features are be added in legacy and some other ERP features like SuiteBilling require SuiteTax. |
| What happens to my historic transactions post migration? | All transactions are migrated without any edits or changes. GL impact of historic transactions will remain unchanged. You can edit them but tax will be recalculated based on the SuiteTax Engine rules. |
| What records are migrated? | Subsidiary tax registrations, nexus records, customer and vendor records are all migrated into the SuiteTax environment |

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| Are the tax codes and rates same in SuiteTax? | No, legacy tax codes and associated rates are archived, as the SuiteTax Engine provisions new tax codes and rates. |
| Do I have an option NOT to move to SuiteTax? | Right now, yes but at some date in the future (TBD) there will be no option. |
| Who are the NetSuite tax partners that offer SuiteTax integration? | Anrok, Avalara, Sovos, Thomson Reuters, Vertex, and Wolters Kluwer |
| What are the next steps in case I encounter errors while setting up SuiteTax bundles? | Contact NetSuite Customer Support |