

Configure EDGE Tax Related Project Settings

Project settings, including those needed to enable tax calculation functions and the associated tax calculation services for the current project, are configured in the EDGE **System Admin** module.

Procedures

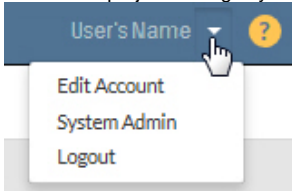


Notes:

- These procedures include several settings that are unique to the particular tax services provider that you are configuring. If you have not already obtained the applicable information, refer to **Before You Begin** for information about obtaining the appropriate values needed to populate the fields for the tax calculation service provider that is being configured.
- Though you may enter configuration settings for multiple providers, only one tax calculation provider may be selected and used at one time as the current provider for a project.

To configure EDGE project settings for a tax calculation service:

1. Access the project settings by doing one of the following:



- Click **System Admin** in the EDGE Administrative tasks menu. The **System Admin** page opens with the **Project Settings** page displayed. *or*
 - If another **System Admin** function page is already open, select **EDGE SETUP > Project Settings** from the left navigation menu. The **Project Settings** page opens.
- The applicable settings are found in the **Tax Related** section near the top of the page.

2. In the **Calculate tax on order** field, select the radio button to enable tax calculation functions.



Important!

In order for any of the tax calculation services to work properly, the function for calculating tax during order input must be enabled.

Tax Related

This group of settings will allow for specific merchant configuration of tax management

NAME	CODE	VALUE	VALIDATE
Avalara Account Number	AvalaraAccountNumber	<input type="text" value="1100059981"/>	<input type="checkbox"/>
Avalara Company Code	AvalaraCompanyCode	<input type="text" value="APTrialCompany"/>	<input type="checkbox"/>
Avalara License Key	AvalaraLicenseKey	<input type="text" value="3155294789C20863"/>	<input type="checkbox"/>
Avalara WebService URL	AvalaraWebServiceURL	<input type="text" value="https://development.avalara.net/tax/taxsvc.asmx"/>	<input type="checkbox"/>
Calculate tax on order. Boolean Yes(1)/No(0)	calculateTax	<input checked="" type="radio"/> 1 <input type="radio"/> 0	<input type="checkbox"/>



Note:

Perform step 3, below, only if you have configured one or more members for tax exempt status, as described in **Configure Members**, and want to activate that status at this time. Otherwise, skip this step and go directly to **step 4**.

3. Locate the **If a member has a Tax Number value don't charge them tax** field and select the radio button to disable tax calculation for members configured with a tax number for tax exempt status.

CyberSource Password	CyberSourcePassword	<input type="text" value="g1wvQ8WEj071vecdK3hZvchiteh4E9BjccJ316Tvcuoh7/4i7w"/>	<input type="checkbox"/>
CyberSource Username	CyberSourceUsername	<input type="text" value="notstax"/>	<input type="checkbox"/>
If a member has a Tax Number value don't charge them tax.	taxOverrideMemberTaxNumber	<input checked="" type="radio"/> 1 <input type="radio"/> 0	<input type="checkbox"/>
Enable Tax Caching(default false)	taxCachingEnable	<input type="radio"/> True <input checked="" type="radio"/> False	<input type="checkbox"/>
Create the Vertex invoice audit record? Boolean Yes (1)/No(0)	saveOrderToVertex	<input type="radio"/> 1 <input checked="" type="radio"/> 0	<input type="checkbox"/>
Save/commit tax result into 3rdParty tax provider	CommitTax	<input checked="" type="radio"/> True <input type="radio"/> False	<input type="checkbox"/>

4. Locate the **Enable Tax Caching** field and select the radio button if you want to enable this function.

If a member has a Tax Number value don't charge them tax	taxOverrideMemberTaxNumber	<input checked="" type="radio"/> <input type="radio"/>
Enable Tax Caching(default false)	TaxCachingEnable	<input checked="" type="radio"/> True <input type="radio"/> False
Create the Vertex invoice audit record? Boolean Yes (1)/No(0)	saveOrderToVertex	<input type="radio"/> <input checked="" type="radio"/>

i Though enabling tax caching is recommended, enabling this function is optional. If you do not want to enable tax caching, select the radio button.

Enabling tax caching can reduce the number of queries sent to the tax services provider during payment processing. When tax caching is enabled, the system checks for changes to the order (e.g., items, quantity, address, etc.) before sending a request for tax calculation. If no changes are found, the cached value is provided

5. Locate the **Save/commit tax result into 3rd Party tax provider database** field and select the radio button if you want to enable this function. (Optional.)

enable Tax Caching(default false)	TaxCachingEnable	<input type="radio"/> True <input checked="" type="radio"/> False
Save/commit tax result into 3rdParty tax provider database (Default - False)	CommitTax	<input checked="" type="radio"/> True <input type="radio"/> False
Strike Iron Cache Valid Timeout(days)	StrikeIronCacheTimeout	an

Notes:

This setting is applicable only for tax services providers that support this function.

Tax commit is not applicable for the "Charges Waived" payment type.

Refer to [Verify Tax Services Providers Supported Features](#) for information about the features supported by each tax services provider.

6. Locate the **Charge tax on giftwrapping amounts** field and select the radio button if you want to enable this function. (Optional.)

The version of Strike Iron WS implementation.	strikeIronVersion	<input type="text" value="v1"/>
Charge tax on giftwrapping amounts. Boolean Yes (1)/No(0)	taxGiftCharge	<input checked="" type="radio"/> <input type="radio"/>
Which service would you like to use to calculate your tax?	taxService	<input type="text" value="EDGE"/>

Note:

When enabled, this field is only applicable when the merchant has also configured both of the following gift-wrapping-related fields in the **Order Related** project settings in the **EDGE System Admin** module:

1. **Does merchant offer gift wrapping service** (select the radio button to enable)
2. **Charge for gift wrapping per item** (specify a flat amount to charge per item when added to the cart during order entry)

7. Locate the **Which service would you like to use to calculate your tax?** field and select one of the available tax calculation services listed in the drop-down menu.

Which service would you like to use to calculate your tax?	taxService	<input type="text" value="EDGE"/>
Charge tax on shipping and handling amounts. Boolean Yes(1)/No(0)	taxShippingHandling	<input type="text" value=""/>
Vertex O Series Company Code	VertexOSCompanyCode	<input type="text" value=""/>

- StrikeIron
- EDGE**
- OtherSource
- VertexOSeries
- VertexOSeriesPier1
- StrikeIronOnline
- Avalara

Notes:

- This is **required** in order for the appropriate tax services provider to be used.

- Only one tax calculation provider may be selected and used at one time as the current provider for a project.

8. Locate the **Charge tax on shipping and handling amounts** field and select the radio button to enable this function. *(Optional.)*

Charge tax on shipping and handling amounts. Boolean Yes(1)/No(0)	taxShippingHandling	<input checked="" type="radio"/> <input type="radio"/>
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9. Locate the **Tax System** field and use the drop-down list to select which tax calculation standards should be used for the display of pricing.

Tax System (e.g., US = Non-VAT, EU = VAT)	TaxSystem	Non-VAT
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Options include:

- **VAT** – when this option is selected, the Value-Added Tax (VAT) standard format for display of pricing (as is used in member states of the European Union, for example) is used in the EDGE Customer Service Portal (CSP), merchant front-end website and other places where prices are listed, such as order and line item detail pages, invoices, event notifications, and so forth. The listed price is tax-inclusive (tax is included).

! **Important:**

When VAT pricing is used, the amount of VAT must be included when the prices are specified during creation or update of catalog items, SKUs and shipping and handling charges.

The example below shows the display for the items on an order's associated **Order Line Detail** page, indicating that the price "Includes VAT."

ORDER LINE DETAIL	
ORDER #:	0000007147
ITEM #:	2409UK
ITEM NAME:	32 Inch Flat Screen TV
ITEMS:	£274.00
*Includes VAT	
DISCOUNT:	£0.00
GIFT WRAPPING:	£0.00

- **Non-VAT** – when this option is selected, EDGE uses the tax-exclusive, non-VAT format (as is used in the United States, for example), where tax is not included in the listed price.


In the example below, you can see that, for non-VAT, the tax is calculated and listed separately for the items on an **Order Detail** page.

ITEMS:	\$50.00
DISCOUNT:	\$0.00
GIFT WRAPPING:	\$0.00
SHIPPING & HANDLING:	\$5.00
SHIPPING INSURANCE:	\$0.00
SHIPPING & HANDLING TAX:	\$0.33
EXCISE/DUTY TAX:	\$0.00
ITEM TAX:	\$3.27
ORDER TOTAL:	\$58.60

10. Scroll to the settings group for the tax calculation service you selected in [step 7](#), and enter the appropriate information in the **Value** fields. The values for these fields are unique for each individual tax services provider. The applicable settings for **Avalara**, **CyberSource**, **Strikelron** and **Vertex O Series** are described in [Settings by Provider](#).

When you are done entering the settings for the applicable tax calculation service provider, continue with [step 11](#).


11. Click  **Submit** at the bottom of the **Tax Related** section to save the new settings.

 **To continue . . .**

Once you have completed configuring the tax-related project settings, continue with **Verify Fulfillment Provider Settings**. This is necessary because the tax calculation services require that the configuration for any provider associated with a merchant's warehouse/fulfillment center contains accurate location address settings.

Settings by Provider

The **Procedures** described in this section include several settings that are unique to the particular tax services provider that you are configuring. The setting fields for each provider are described below. Use these settings, as applicable, to complete **step 10** of the procedures.

 **Notes:**

- If you have not already obtained the applicable information, refer to **Before You Begin** for information about obtaining the appropriate values needed to populate the fields for the tax calculation service provider that is being configured.
- Though you may enter configuration settings for multiple providers, only one tax calculation provider may be used at one time as the current provider for a project.

Individual Provider Settings

The settings for each tax calculation service are described below:

Avalara

The following settings are available for Avalara:

Tax Related

This group of settings will allow for specific merchant configuration of tax management

NAME	CODE	VALUE
Avalara Account Number	AvalaraAccountNumber	1100059981
Avalara Company Code	AvalaraCompanyCode	APITrialCompany
Avalara License Key	AvalaraLicenseKey	31552947B9C80863
Avalara WebService URL	AvalaraWebServiceURL	https://development.avalara.net/tax/taxsvc.asmx

Avalara Setting Field Name	Description
Avalara Account Number	The merchant's Avalara account number
Avalara Company Code	Company code provided by Avalara
Avalara License Key	The access key provided by Avalara
Avalara WebService URL	The Internet address of the Avalara Web Service

CyberSource

The following settings are available for CyberSource:

Calculate tax on order. Boolean Yes(1)/No(0)	calculateTax	<input checked="" type="radio"/> 1 <input type="radio"/> 0
Cyber Endpoint URL address	CyberEndpointURL	https://ics2wstest.ic3.com/commerce/1.x/transactionProce
CyberSource MerchantId	CyberSourceMerchantId	notesters
CyberSource Password	CyberSourcePassword	q1lwoQBWEjp07
CyberSource Username	CyberSourceUsername	P2ester
If a member has a Tax Number value don't charge	taxOverrideMerchantTaxNumber	<input type="radio"/> 1 <input type="radio"/> 0

CyberSource Setting Field Name	Description and Values
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CyberEndpoint URL address	<i>The Internet address for the CyberSource Cyber Endpoint in a production environment: https://ics2wsa.ic3.com/commerce/1.x/transactionProcessor</i> <i>Use this URL in a test environment: https://ics2wstesta.ic3.com/commerce/1.x/transactionProcessor</i>
CyberSource MerchantId	<i>The merchant's CyberSource Merchant ID number</i>
CyberSource Password	<i>The password associated with the merchant's CyberSource user name</i>
CyberSource Username	<i>The merchant's CyberSource user name</i>

Strikelron

The following settings are available for Strikelron:

Strike Iron Cache Valid Timeout(days)	StrikeIronCacheTimeout	<input type="text"/>
The login password for strike iron registration	strikeIronpassword	<input type="text" value="strikeironpw"/>
The login username for strike iron registration	strikeIronUser	<input type="text" value="PZester"/>
The version of Strike Iron WS implementation.	strikeIronVersion	4 <input type="button" value="v"/>

Strikelron Setting Field Name	Description
The login password for strike iron registration	The password associated with the merchant's login user name
The login username for strike iron registration	The merchant's login user name for Strikelron registration


FYI...

The Strikelron fields immediately before and after the password and username fields are obsolete and will be removed from the project settings in an upcoming release of EDGE. You can ignore these obsolete fields.

Vertex O Series

The following settings are available for Vertex O Series:

Vertex O Series Company Code	VertexOSCompanyCode	<input type="text" value="VCSeriesCompCode"/>
Vertex O Series Password	VertexOSPassword	<input type="text" value="VCSeries2pw"/>
Vertex O Series Quotation Request URL	VertexOSQuotationURL	<input type="text" value="https://www.vertexinc.com/oseries/quotation/xxxxx"/>
Vertex O Series UserName	VertexOSUserName	<input type="text" value="VCSeries2"/>



Vertex O Series Setting Field Name	Description
Vertex O Series Company Code	<i>The company code provided by Vertex</i>
Vertex O Series Password	<i>The password associated with the merchants Vertex O Series user name</i>
Vertex O Series Quotation Request URL	<i>The Internet address for the Vertex O Series Quotation Request</i>
Vertex O Series UserName	<i>The merchant's Vertex O Series user name</i>