AccountMate's TaxJar Integration module provides sales tax automation where correct tax rates are determined based on the user's Nexus state and each state's Economic Nexus Laws, the customer's tax exemption type, the customer's shipping addresses, and the types of products included in an order. Some products could be either exempted from sales tax or taxed at a reduced rate in various tax jurisdictions.

With this module, AccountMate provides complete flexibility in allowing users to decide whether they want to take the responsibility of maintaining the tax rates and choosing the sales tax code for each transaction or to allow TaxJar to determine the correct tax rate. This module is applicable only to companies that are using the "United States" country tax and using "USD" as their home currency. This module integrates with AccountMate's Sales Order, Accounts Receivable, and Return Merchandise Authorization modules.

AccountMate 12 for SQL or Express
TaxJar Integration Module

Flexibility to Choose the Tax Rates for Sales Tax Calculation

AccountMate provides the flexibility for users to choose the tax rates to be used in calculating the sales taxes. Users can choose to assign to the sales order or invoice transactions a specific sales tax code to trigger AccountMate to automatically call the TaxJar sales tax calculation API to determine the sales tax rates and calculate the sales tax amounts. Users may also assign a specific sales tax code for tax-exempt transactions so no sales taxes will be calculated. Users can also opt to maintain the tax rates and assign the sales tax code for each transaction.

Setting Up TaxJar Integration Parameters

Verify Customer's Tax Exemption Certificate Expiry Date

Users can configure AccountMate to validate for any tax-exempt customer the tax exemption certificate expiration date or to ignore the expiration date, if needed, Expired certificate means the customer transaction will be considered as non-exempt.

Assign Product Tax Categories to Inventory Items

TaxJar provides the tax rules for product categories to be used for certain products that are either exempted from sales tax or subject to reduced sales tax rates in some tax jurisdictions. With a single click of a button, users can regularly import from TaxJar the list of product tax categories, which can be assigned to the tax-exempt inventory items or those items taxed at reduced rates.

Import from TaxJar the Nexus State Information

Users have the option to regularly import into AccountMate the Nexus state information that the users have newly set up or amended on the TaxJar portal.

Perform Immediate or Scheduled Transaction Synchronization

Users can set up the date range of transactions that should be uploaded to TaxJar for sales tax reporting and filing. They can also configure AccountMate to synchronize the transactions either immediately or on a preset schedule.

Up-to-date Sales Tax Reporting and Filing

The TaxJar portal provides easy viewing and tracking of each transaction's sales taxes due to the state, county, city, and other tax jurisdictions. TaxJar simplifies sales tax filing by breaking down the sales taxes by state, county, city, and other specific tax jurisdictions. Users can readily make payments based on the TaxJar-prepared sales tax forms.

Integration with the Sales Order, Accounts Receivable, and Return Merchandise Authorization Modules

• Integration with the Sales Order, Accounts Receivable, and Return Merchandise Authorization modules provides more flexibility in allowing users to choose the tax rates to be used in calculating the sales taxes for applicable order and invoice transactions. Specific sales tax entity codes and specific sales tax codes will be used to identify the transactions that use TaxJar for sales tax calculation and those tax-exempt transactions.

• The TaxJar Integration module provides the option for users to configure AccountMate to automatically call TaxJar to recalculate the sales taxes each time a change is made in the order or invoice transaction that affects the sales tax amount (e.g., add a line item; update the transaction details—order quantity, unit price, freight, etc.). Users can also opt anytime at their discretion to click a button to trigger Account Mate to send TaxJar a request to recalculate the sales taxes.

• When integrated with the Sales Order and Accounts Receivable modules, users can designate a customer or shipping address record as tax-exempt by choosing the proper tax exemption type, which becomes the default in the applicable Transaction functions. This configures AccountMate to <u>not</u> calculate sales taxes for that customer's transactions or those assigned with that particular shipping address record. This feature is helpful in processing transactions for wholesales, resellers, and government entities that are typically exempted from sales taxes.

Other Features

• Transaction Sync Log allows users to easily track the list of transactions that are synchronized with TaxJar and those new transactions that are yet to be uploaded to TaxJar.

• TaxJar sends email reminders about the sales tax return due dates, which helps users avoid missing the deadlines for sales tax forms filing and remittances.

• Ability to configure for TaxJar to automatically file the state tax forms and remittances on due dates, which saves users from the hassle of sales tax reporting and filing processes.

AccountMate Software Corporation
1445 Technology Lane | Suite A5 | Petaluma, California 94954 | USA
800-877-8896 | 707-774-7500 | www.accountmate.com

AM8111_5455