



# GTD Adapter for NetSuite



## NetSuite Installation Guide

Welcome to NetSuite!

Consult this document to learn the features, functionalities, and installation instructions for the Sovos Tax Integration Package for NetSuite SuiteTax.





## Disclaimer

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## NetSuite Customer Implementation Guide

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## Overview

This guide will allow you to install the Sovos bundle for NetSuite SuiteTax to your NetSuite environment.

Before you follow this guide, please ensure that your Professional Services representative has your configurations created on the Sovos side.

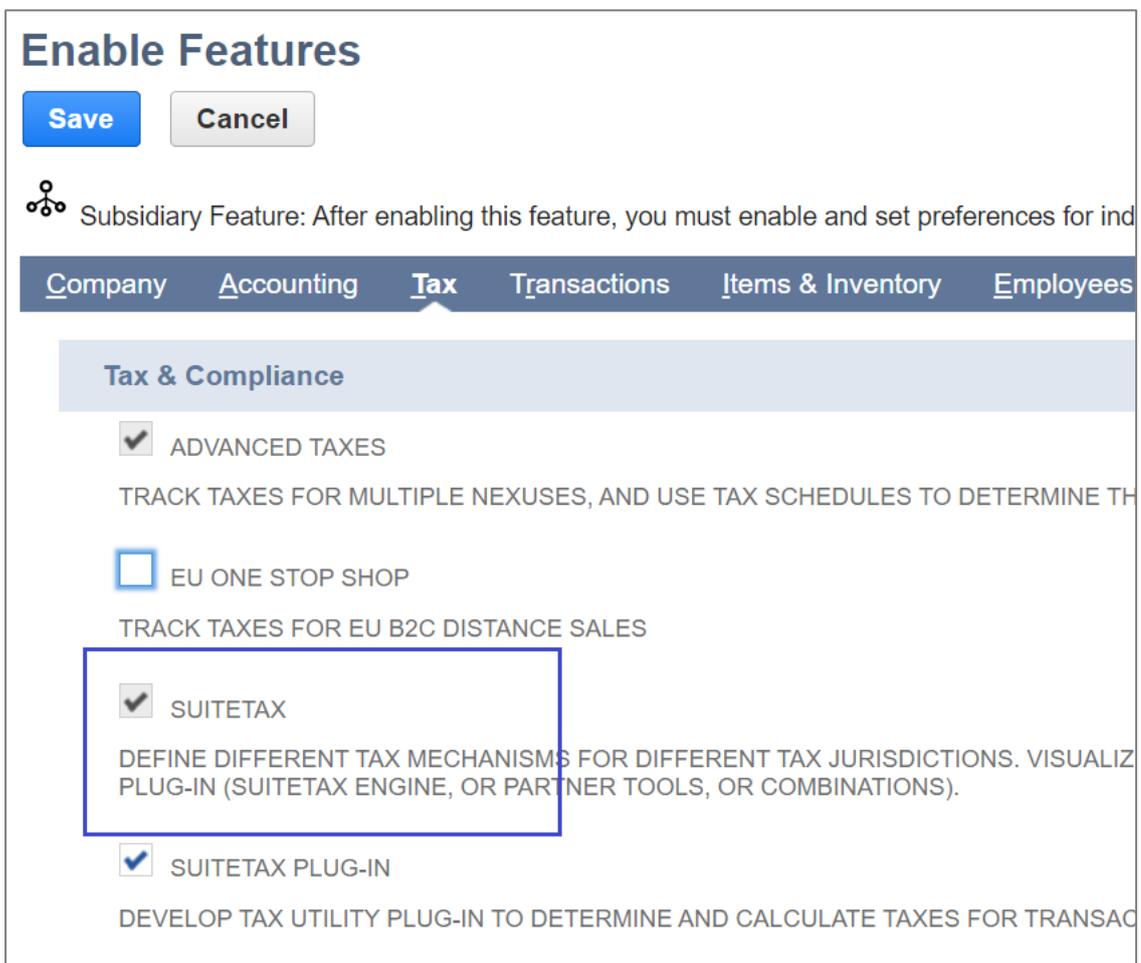
### Bundle Purpose

The Sovos Tax Integration Package will install the necessary scripts into your NetSuite environment so that NetSuite can communicate with Global Tax Determination (GTD) for your tax determination needs. The scripts will use the NetSuite SuiteTax API to gather the necessary information and send it to the Global Tax Determination Adapter for NetSuite hosted within the Sovos Compliance data center. The Adapter will communicate with Global Tax Determination and relay the response to the javascript contained within this Bundle to be integrated with the NetSuite environment.

## Installing the Bundle

### Prerequisites

- NetSuite Users must have the role of Administrator to install this bundle.
- NetSuite SuiteTax must be enabled. To verify this, a user with the role of Administrator can go to **Setup > Company > Enable Features**, click the **Tax** tab and confirm that the **SuiteTax** check box is selected.



**Enable Features**

**Save** **Cancel**

Subsidiary Feature: After enabling this feature, you must enable and set preferences for ind

Company Accounting **Tax** Transactions Items & Inventory Employees

**Tax & Compliance**

**ADVANCED TAXES**  
TRACK TAXES FOR MULTIPLE NEXUSES, AND USE TAX SCHEDULES TO DETERMINE TH

**EU ONE STOP SHOP**  
TRACK TAXES FOR EU B2C DISTANCE SALES

**SUITETAX**  
DEFINE DIFFERENT TAX MECHANISMS FOR DIFFERENT TAX JURISDICTIONS. VISUALIZ  
PLUG-IN (SUITETAX ENGINE, OR PARTNER TOOLS, OR COMBINATIONS).

**SUITETAX PLUG-IN**  
DEVELOP TAX UTILITY PLUG-IN TO DETERMINE AND CALCULATE TAXES FOR TRANSAC

- Custom Records must be enabled. To confirm this, a user with the role of Administrator can go to **Setup > Company > Enable Features**, click the **SuiteCloud** tab, and verify that the **Custom Records** check box is selected.

**Enable Features**

Save Cancel

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**

VIEW SUITECLOUD [TERMS OF SERVICE](#). TRANSLATIONS OF THE SUITECLOUD TERMS OF SERVICE ARE ALSO AVAILABLE ON THE ORACLE NETSUITE [WEBSITE](#).

**SuiteBuilder**

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

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

ADVANCED PDF/HTML TEMPLATES

- If you have the Nexus named United States CA configured in your NetSuite environment, you must inactivate it because it is no longer valid. Go to **Setup > Tax > Nexuses**, click on the **Edit** link for the **United States CA** nexus, click on the **Inactive** check box, then click on the **Save** button.

**Nexus**

Save Cancel

COUNTRY  
United States

STATE/PROVINCE/COUNTY  
California

DESCRIPTION \*  
United States CA

PARENT NEXUS

**INACTIVE**

USE FULFILLMENT TO M...

TAX AGENCY  
Tax Agency CA

Installation Steps

To install the bundle, you need to provide your NetSuite Account ID. To find your Account ID, follow these steps:

1. Go to **Setup > Company > Company Information**.

Setup	Commerce	SuiteApps	Support
Setup Manager	SETUP TASKS		
Company >	Company Information		

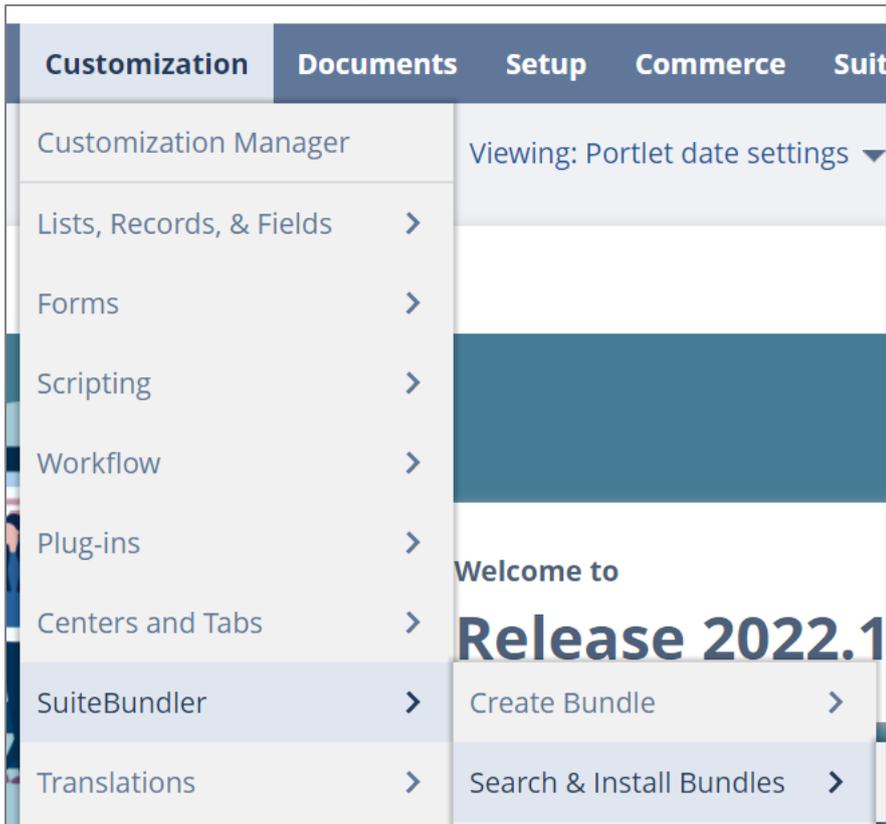
2. Note the **Account ID**, which is listed on the lower lefthand side of the page.

### Company Information

Save
Cancel

COMPANY NAME * <input type="text" value="Staging QA"/>	EMPLOYER IDENTIFICATION NUMBER (EIN) <input type="text"/>
LEGAL NAME <input type="text" value="Honeycomb Mfg"/>	UPS 3RD PARTY BILLING ACCOUNT NUMBER <input type="text"/>
COMPANY LOGO (FORMS) <input type="text"/>	FEDEX 3RD PARTY BILLING ACCOUNT NUMBER <input type="text"/>
COMPANY LOGO (PAGES) <input type="text"/>	3RD PARTY BILLING ZIP <input type="text"/>
<input checked="" type="checkbox"/> DISPLAY LOGO INTERNALLY	3RD PARTY BILLING COUNTRY <input type="text" value="United States"/>
WEB SITE <input type="text"/>	<input type="checkbox"/> PURGE ACCOUNT
COUNTY/STATE/PROVINCE * <input type="text" value="California"/>	FIRST FISCAL MONTH * <input type="text" value="January"/>
COUNTRY <input type="text" value="United States"/>	TIME ZONE <input type="text" value="(GMT-08:00) Pacific Time (US &amp; Canada)"/>
RETURN EMAIL ADDRESS * <input type="text"/>	<div style="border: 1px solid blue; padding: 2px;">                     ACCOUNT ID                      TSTDRV13722                 </div> DATA CENTER

3. Ask your Professional Services representative to make the *Sovos Tax Integration Package* available. Provide your account ID with the request.
4. Before installing the bundle, your Professional Services representative will provide you with the Sovos URL, username, and password so that you can authenticate and make the connection to Sovos.
5. Once the bundle is available, go to **Customization > SuiteBundler > Search & Install Bundles**.



6. Enter **Sovos Tax Integration Package** in the Keywords field and click on the **Search** button.

**Search & Install Bundles**

[Search](#)

Basic | [Advanced](#)

LEAVE THE KEYWORDS BOX BLANK AND CLICK SEARCH TO VIEW THE MOST POPULAR SUITEAPPS

KEYWORDS

[Installation Terms of Service](#)

NAME	BUNDLE ID	VERSION	MANAGED	COMPANY NAME	PUBLISHER ID	CREATED ON	AVAILABILITY
Sovos Tax Integration Package	378809	9.0.5		SOVOS SUITETAX		19-MAR-21	Shared

- Click the link to open the Sovos Tax Integration Package.

NAME	BUNDLE ID	VERSION
Sovos Tax Integration Package	378809	9.0.5

- To view a list of files and other components that the Bundle will install into your NetSuite environment, select the **Components** tab.
- Click on the **Install** button.

**Bundle Details**

Sovos Tax Integration Package

[Back](#) | [Install](#)

NAME  
Sovos Tax Integration Package

ID

The Preview Bundle Install screen will appear listing the components that will be installed as a part of the Bundle.

- Click on the **Install Bundle** button to begin the installation.

**Preview Bundle Install**

[Cancel](#) | [Install Bundle](#)

**Name:** Sovos Tax Integration Package **Version:** 9.0.5

BUNDLE CONTENTS	EXISTING OBJECT IN CONFLICT
<b>Custom Fields</b>	
<b>Transaction Body Fields</b>	
Sovos Commit Status	

On the **Installed Bundles** screen, you'll see a *Pending* status if the installation is still in progress.

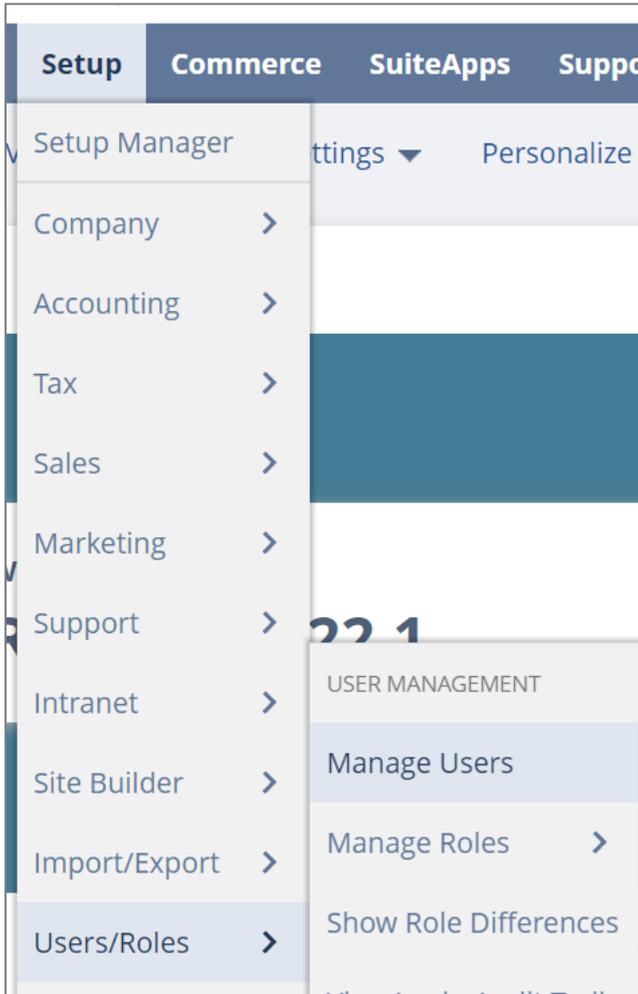
Once the installation is complete, you'll see a green checkmark in the Status column.

Verifying the Installation & Additional Configuration

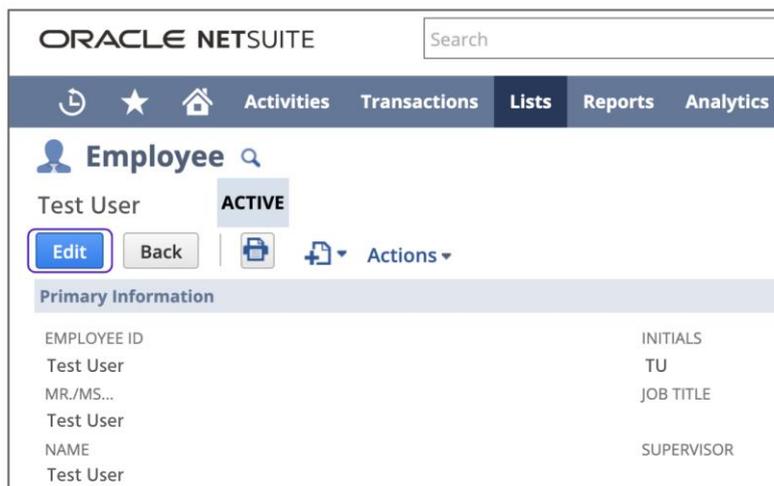
Granting Sovos Credential Configuration Permission to Select Users

In order to use the Global Tax Determination Adapter for NetSuite for their tax determination, users must have proper security credentials. To configure these credentials, the user must have the role of **Sovos Administrator**. To grant the user access to this role, follow these steps:

1. Go to **Setup > Users/Roles > Manage Users**.



2. Select the user that you want to set up as Sovos Administrator.
3. Click on the **Edit** button.



- Go to the **Access** tab at the bottom of the screen.
- On the **Roles** sub-tab, select **Sovos Administrator** from the Role drop-down menu on an empty row.

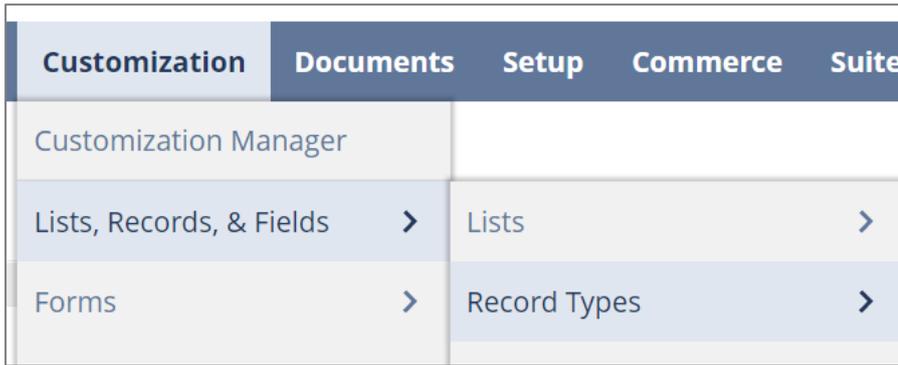
- Click on the **Save** button.

**Note:** All steps must be performed with the Administrator role unless stated otherwise.

### Configuring Security Credentials

Before configuring the security credentials, you need to edit the Configuration Record:

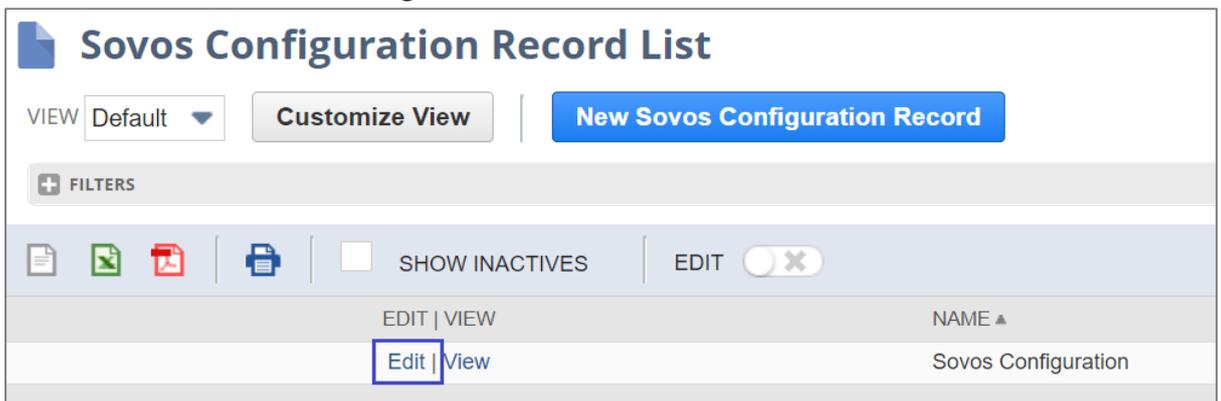
- Go to **Customization > Lists, Records, & Fields > Record Types**.



2. Click on the **List** link on the **Sovos Configuration Record** line.



3. Click on the **Edit** link on the **Configuration Record**.



This allows you to edit the following fields:

- Name – Name of the Configuration Record.
  - Sovos URL – URL that hosts the appropriate adapter environment.
  - Send Error Email check box – If selected, the Adapter sends an email notification when the user encounters error messages.
  - Error Email Sender – Internal ID in NetSuite of the employee who will appear to have sent the error email.  
**Note:** The user selected for this field must have an email address associated with NetSuite.
  - Error Email Recipients – Internal ID in NetSuite or email address of the employees that will receive the error email.
  - User – Username that Sovos Professional Services created during the onboarding.
4. Complete the mandatory fields: Name, Sovos URL (UAT or Production) and Error Email Sender. You can fill in the other fields, but these are not necessary to continue configuring security credentials.

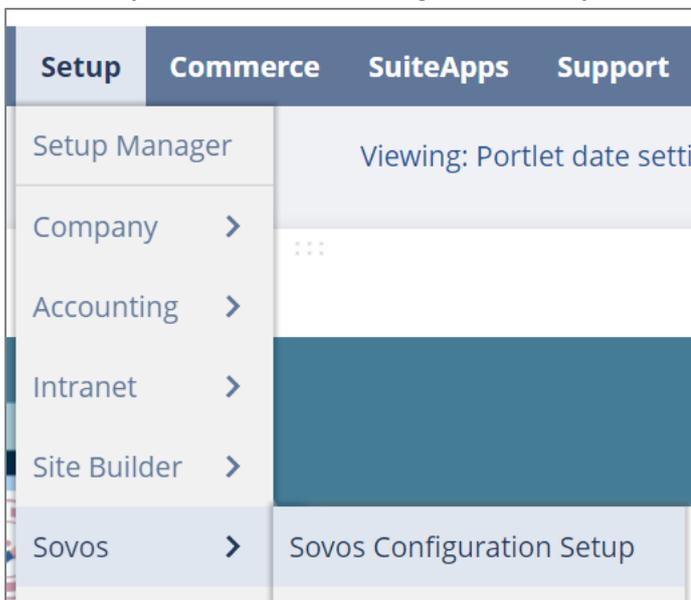
- Once you have finished editing the record, click on the **Save** button.

**Note:** Each user account should contain one Configuration Record. If the user attempts to call the Adapter without a Configuration Record or with multiple Configuration Records, the user will receive an error message.

*Security Credentials*

To configure the proper security credentials for the Global Tax Determination Adapter for NetSuite, a user with the role of **Sovos Administrator** must follow these steps:

- Go to **Setup > Sovos > Sovos Configuration Setup**.



- In the **Sovos URL** field, enter the URL that hosts the appropriate adapter environment:  
 UAT – tweadaptersuat.taxware.net  
 Production – tweadapters.taxware.net

**Sovos Configuration Form Setup**

Reset **Next**

Connection Information

SOVOS URL \*  
tweadaptersuat.taxware.net

3. Click on the **Next** button.

**Sovos Configuration Form Setup**

Reset **Next**

Connection Information

SOVOS URL \*

4. Enter the **Username** and **Password** that were created during the onboarding process.

**Sovos Configuration Form Setup**

Reset **Submit**

Connection Information

SOVOS URL  
tweadaptersuat.taxware.net

**Sovos Credentials**

USERNAME \*  
Username

ENTER PASSWORD \*  
.....

**Note:** To confirm that you entered the correct password, it is recommended that you perform a test sales order after setting up the configuration.

5. Click on the **Submit** button.

**Sovos Configuration Form Setup**

Reset **Submit**

Connection Information

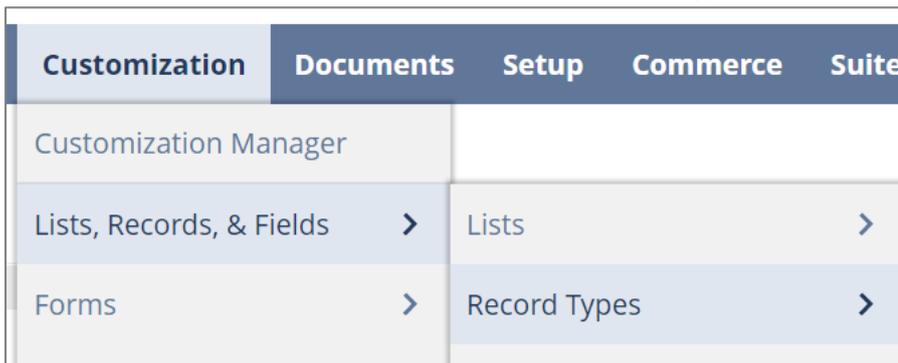
SOVOS URL

Verify Tax Enabled for Transaction Type

Sovos allows for certain transaction types to be turned off within the adapter. If a transaction type is not activated, then no calculation call will be sent to GTD for tax processing and no tax will be

displayed on screen. It is recommended that each transaction type be turned on. To verify that the desired transaction types are turned on:

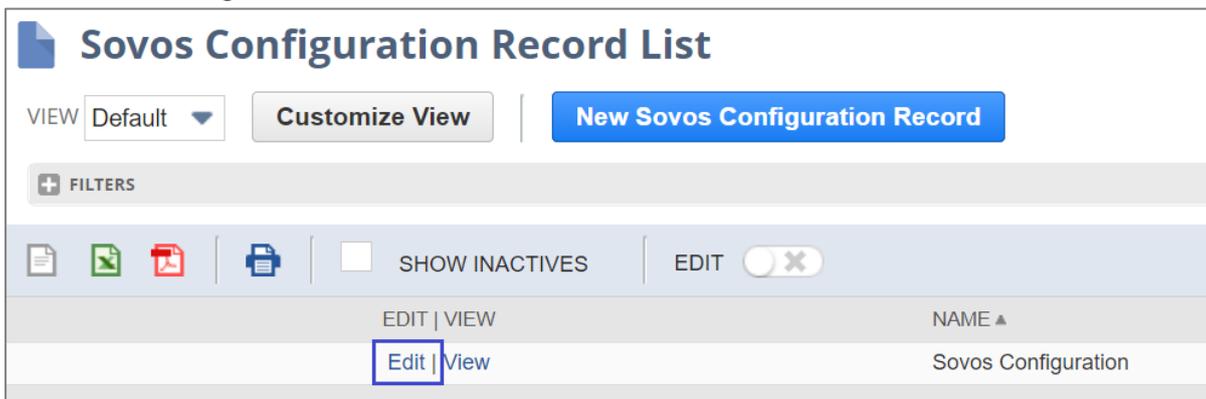
1. Go to **Customization > Lists, Records, & Fields > Record Types**.



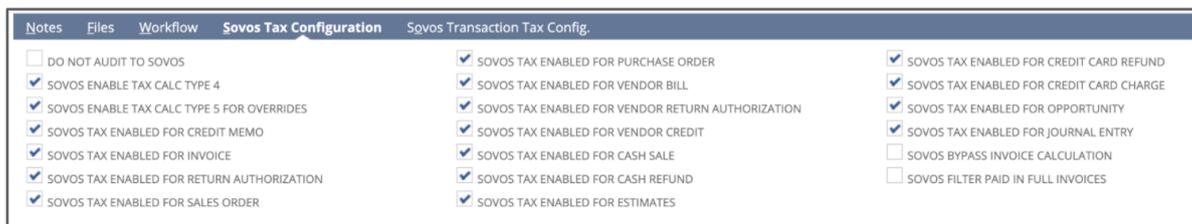
2. In the **Sovos Configuration Record** row, click on **List**.



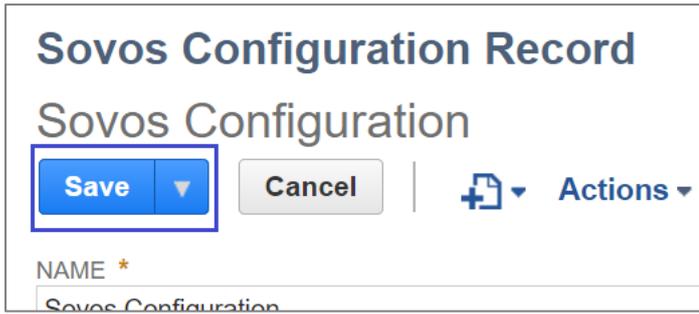
3. In the **Sovos Configuration** row, click on **Edit**.



4. On the **Sovos Tax Configuration** tab, verify that the correct transaction types are activated. Consult your Professional Services representative to determine the correct transaction types for your tax determination.



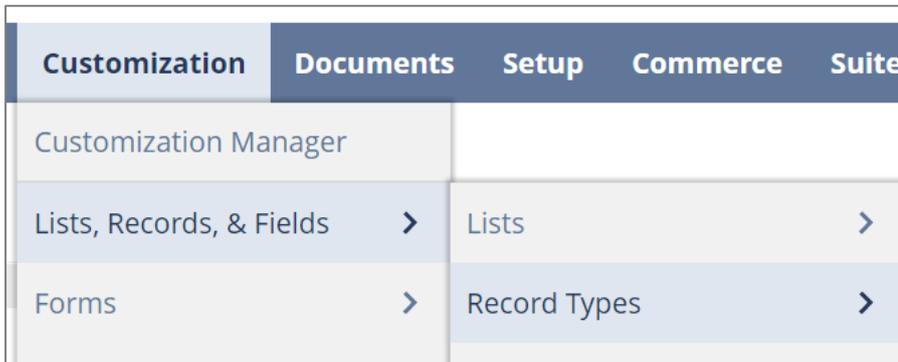
5. Click on the **Save** button.



Back Tax Calculations for Overrides

NetSuite allows users to override Global Tax Determination’s tax details on a transaction and input tax information manually. When configuring the Adapter, you can choose whether to manually enter tax information for transactions or to have GTD do the tax determination for you; to do this, follow these steps:

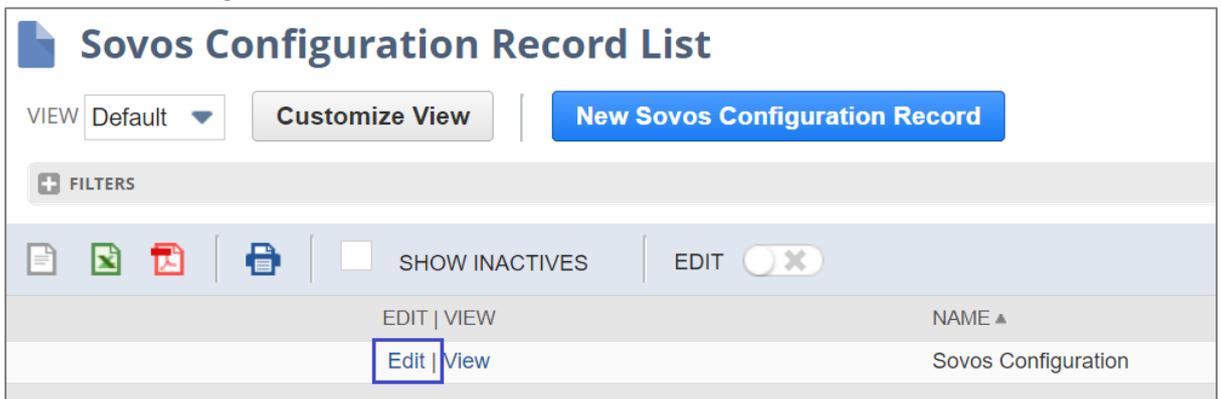
1. Go to **Customization > Lists, Records, & Fields > Record Types**.



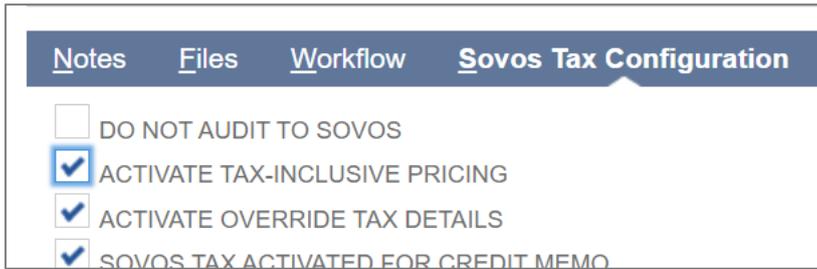
2. In the **Sovos Configuration Record** row, click on **List**.



3. In the **Sovos Configuration** row, click on **Edit**.



4. Select the boxes to set up your preferred configuration:



- When **Do Not Audit To Sovos** is unchecked and **Activate Override Tax Details** is checked, Overrides through NetSuite will trigger a Back Tax Calculation call to GTD.
- When **Do Not Audit To Sovos** is unchecked and **Activate Override Tax Details** is unchecked, Overrides through NetSuite will trigger a Calc Tax Calculation call to GTD.
- When **Do Not Audit To Sovos** is checked and **Activate Override Tax Details** is either checked or unchecked, Overrides through NetSuite will not trigger any call to GTD.

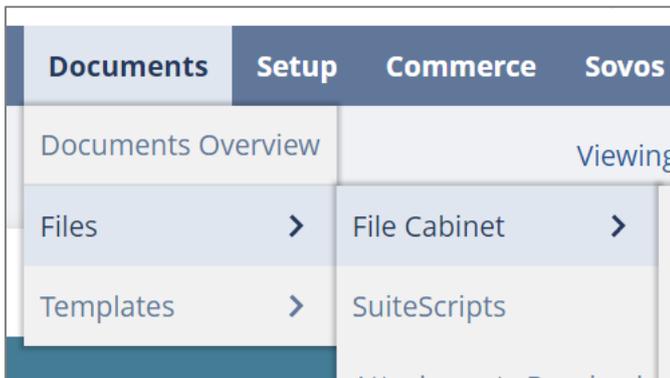
5. Click on the **Save** button.

### Creating the Sovos Folder

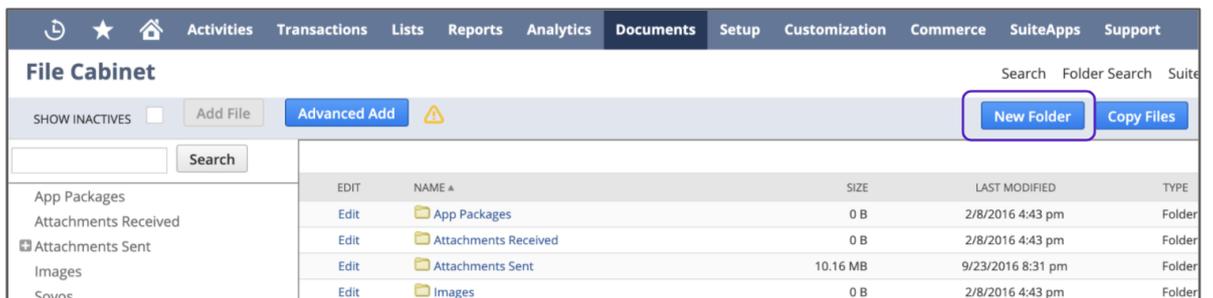
After using the Account Close Suitelet to permanently commit transactions to the GTD audit tables, users can export their audit history as a CSV file. These CSV files must be stored in the Sovos folder. This folder will also contain the CSV file with the countries' tax information.

To create this folder, follow these steps:

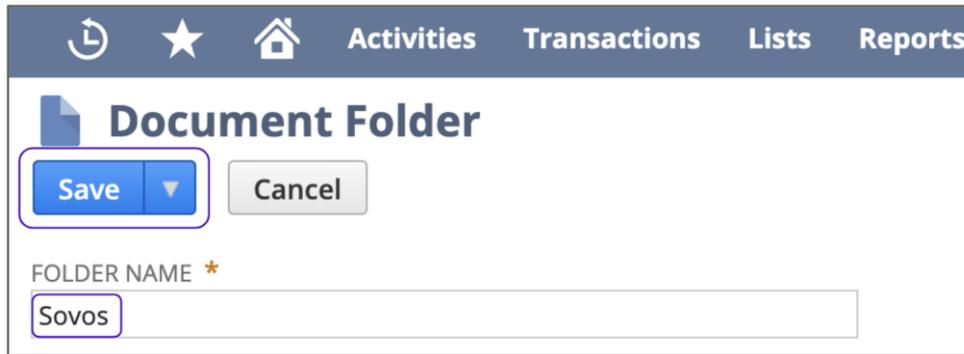
1. Go to **Documents > Files > File Cabinet**.



2. Click on the **New Folder** button.



3. In the **Folder Name** field, enter **Sovos** and click on the **Save** button.



**Note:** The Folder Name is case-sensitive.

- The Sovos folder now appears on the **File Cabinet** screen.

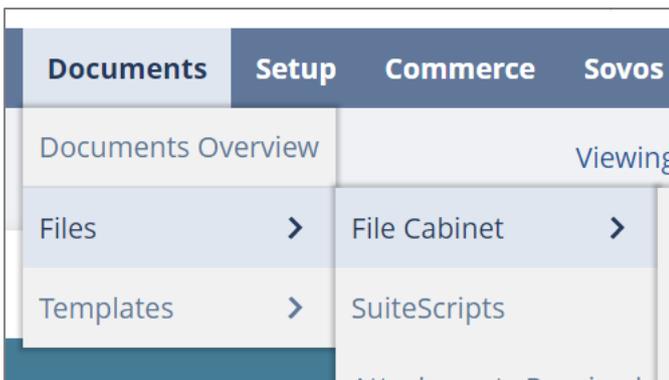


### Copying Sovos Country Installation CSV

The Sovos Add Country Suitelet references a .csv formatted file, which contains countries' tax information to install for use with the Sovos Global Tax Determination Adapter for NetSuite.

To place the `sovos_country_installation.csv` file in the predefined location, follow these steps:

- Go to **Documents > Files > File Cabinet**.



- On the **File Cabinet** screen, click the folder for **SuiteBundles**. This will bring you to the File Cabinet screen containing SuiteBundles folders.

**File Cabinet** Search Folder Search Suite

SHOW INACTIVES  Add File Advanced Add New Folder Copy Files

Search

EDIT	NAME ▲	SIZE	LAST MODIFIED	TYPE
Edit	App Packages	0 B	2/8/2016 4:43 pm	Folder
Edit	Attachments Received	0 B	2/8/2016 4:43 pm	Folder
Edit	Attachments Sent	10.16 MB	9/23/2016 8:31 pm	Folder
Edit	Images	0 B	2/8/2016 4:43 pm	Folder
Edit	Sovos	4.26 MB	8/5/2021 1:34 pm	Folder
Edit	SSL Certificates	0 B	2/8/2016 4:43 pm	Folder
Edit	SuiteApps	0 B	2/8/2016 4:43 pm	Folder
Edit	<b>SuiteBundles</b>	332.08 KB	2/8/2016 4:43 pm	Folder
Edit	SuiteScripts	0 B	2/8/2016 4:43 pm	Folder
Edit	Templates	0 B	2/8/2016 4:43 pm	Folder
Edit	User Documents	0 B	4/17/2020 12:29 am	Folder

- From this list, select the **Bundle 378809** folder which is the Sovos Install Bundle folder.

**File Cabinet**

SHOW INACTIVES  Add File Advanced Add Warning

Search

Sovos

SSL Certificates

SuiteApps

**SuiteBundles**

- + Bundle 118116
- + Bundle 373339
- + **Bundle 378809**
- Bundle 92205

**SuiteBundles**

EDIT	NAME ▲
Edit	Bundle 118116
Edit	Bundle 373339
Edit	<b>Bundle 378809</b>
Edit	Bundle 92205
Edit	Bundle 92487
Edit	Bundle 92498

- Click on the **Copy Files** button.

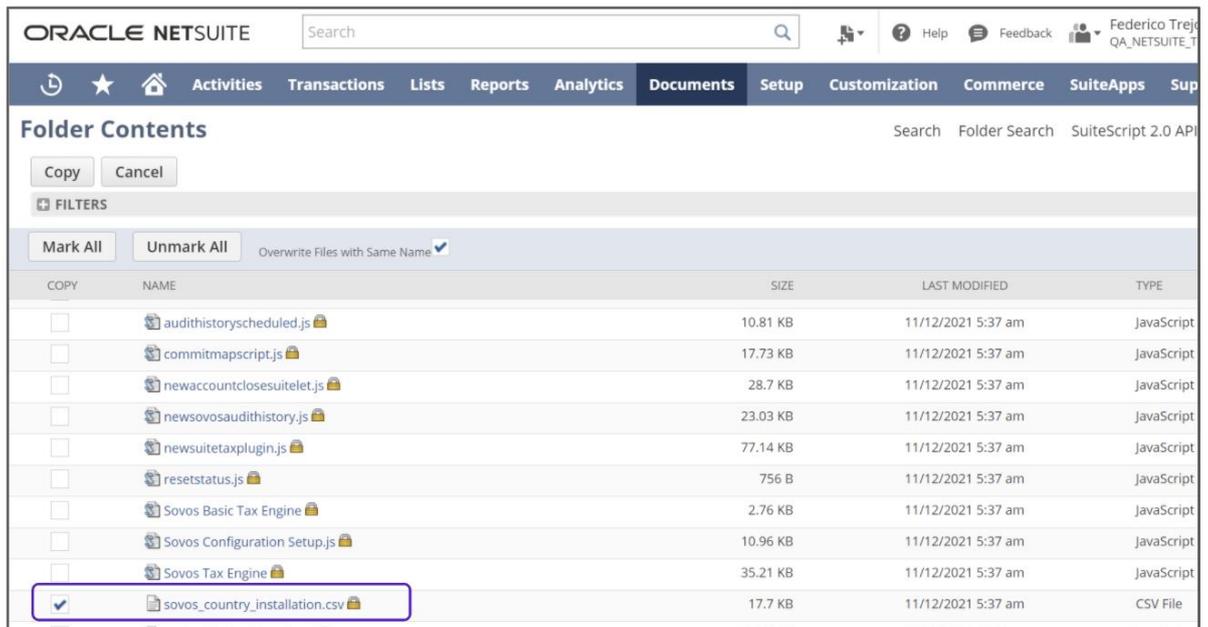
Search Folder Search SuiteScript 2.0 API SuiteScript 1.0 API

New Folder
Copy Files
Delete Files
Move Files

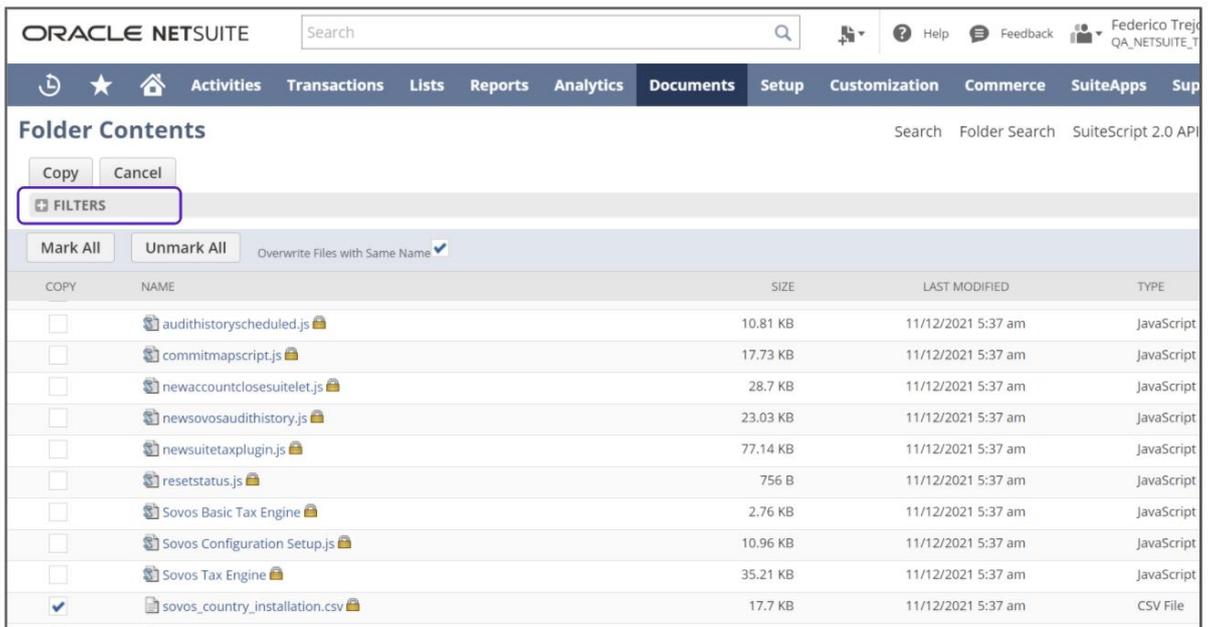
**Total: 12**

LAST MODIFIED	TYPE	DOWNLOAD
11/12/2021 5:37 am	JavaScript File	<a href="#">Download</a>
11/12/2021 5:37 am	JavaScript File	<a href="#">Download</a>
11/12/2021 5:37 am	JavaScript File	<a href="#">Download</a>
11/12/2021 5:37 am	JavaScript File	<a href="#">Download</a>

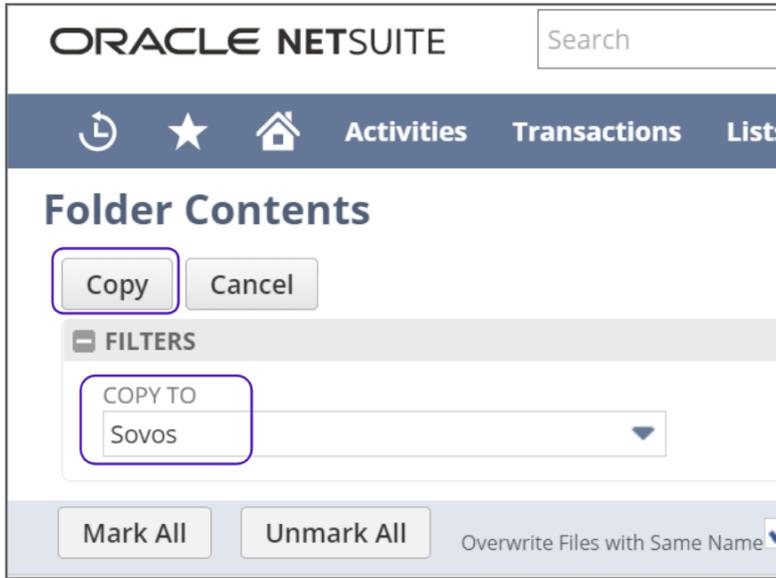
- Select the check box next to *sovos\_country\_installation.csv*.



6. Expand the filters at the top of the screen by clicking the plus (+) sign.



7. In the **COPY TO** drop-down, select the Sovos folder and click on the **Copy** button.

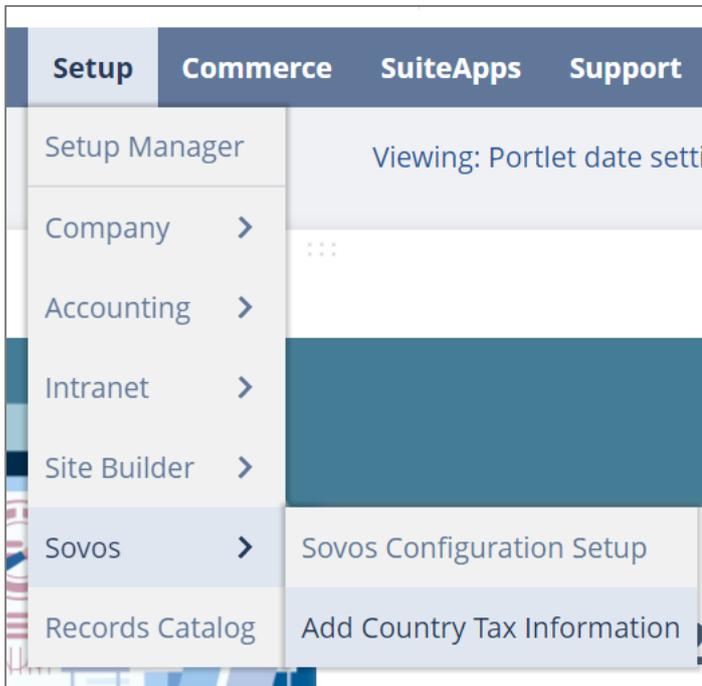


Adding the Countries' Tax Information Suitelet

Once the Sovos Country Installation file has been copied, users are able to use the Sovos Add Country Suitelet to select which countries they want to support.

**Note:** These steps must be performed with the Sovos Administrator role.

1. Go to **Setup > Sovos > Add Country Tax Information**.



2. Select the countries you wish to support in the Sovos Supported Countries field.

Sovos Supported Countries •				
<input type="button" value="Mark All"/> <input type="button" value="Unmark All"/>				
SELECT	COUNTRY ISO CODE	COUNTRY NAME	REGION	DETAILS ▲
<input type="checkbox"/>	US	United States	North America	Installed
<input type="checkbox"/>	GB	United Kingdom	Europe	Installed
<input type="checkbox"/>	NL	Netherlands	Europe	Not Installed
<input type="checkbox"/>	DE	Germany	Europe	Not Installed
<input type="checkbox"/>	EG	Egypt	Africa	Not Installed
<input type="checkbox"/>	CA	Canada	North America	Not Installed

**Note:** All listed countries might not be supported for your NetSuite Account type.

3. Click the **Add Country** button.

## Sovos Country Configuration

### Email Notification

AN EMAIL CONFIRMATION WILL BE SENT UPON COMPLETION OF THE SOVOS COUNTRY CONFIGURATION.

NOTE: IN ALL CASES THE CURRENT USER'S EMAIL ADDRESS WILL BE USED.

EMAIL RECIPIENTS

4. A Schedule Script will be generated, placed in a queue managed by NetSuite, and run when appropriate. The current user and any additional recipients will receive an email when the script is complete. The email will include information regarding the recently installed countries as well as any countries that may have failed to install.

## Sovos Country Configuration

### Status

MESSAGE FROM SOVOS COUNTRY CONFIGURATION  
Sovos Tax Detail Installation Script was submitted on 05/11/2022 02:23pm UTC. You will receive an email when installation of the country tax details has been completed.

**Note:** Suitelet will install NetSuite Nexus, Tax Types, and Tax Codes that Sovos has determined are associated with the countries selected.

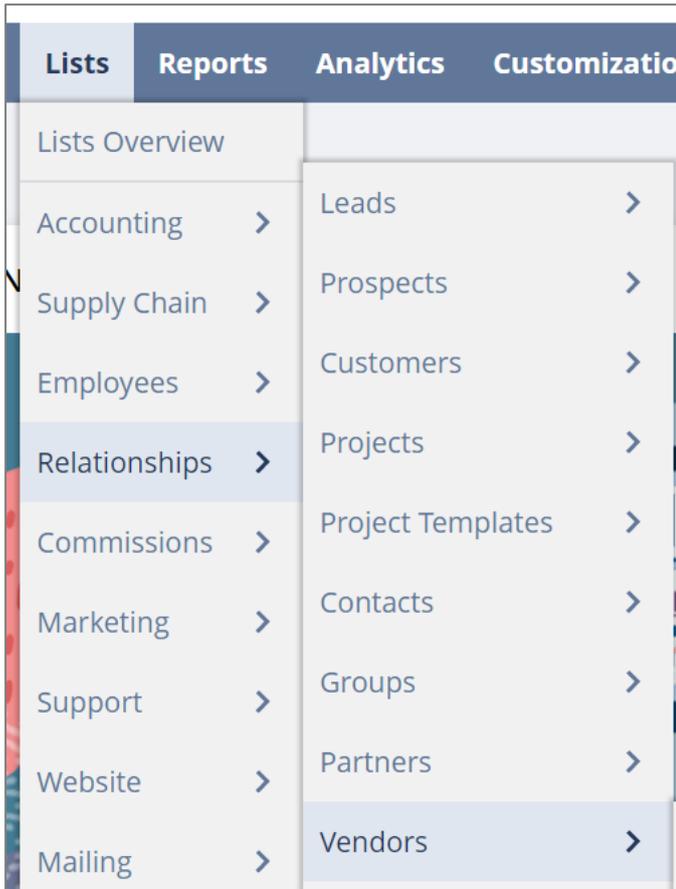
### Configuring Nexuses

Any Nexus that is going to be used for tax determination must have a Tax Agency set for it.

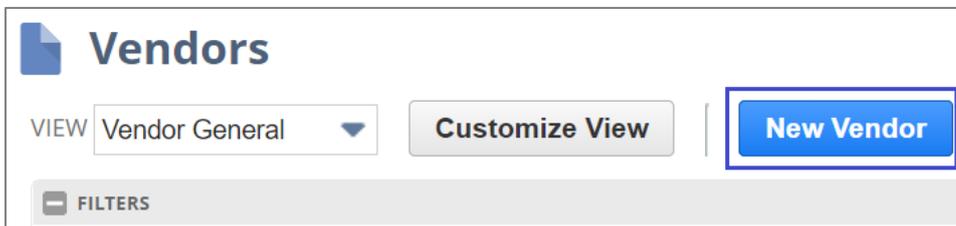
A tax agency can be any vendor set up in NetSuite and can be used to funnel tax amounts to specific bank accounts in NetSuite. Every nexus should have its own distinct tax agency.

To create a new Tax Agency, follow these steps:

1. Go to **Lists > Relationships > Vendors**.



2. Click on the **New Vendor** button.

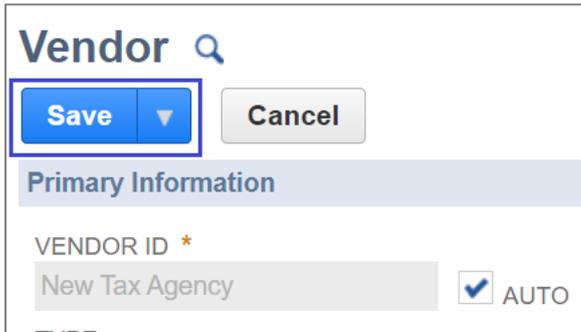


3. In the Primary Information section:
  - a. In the **Company Name** field, enter the name of the Tax Agency.
  - b. Select **Tax Agency** from the **Category** drop-down list.

4. If this is an OneWorld-type account, in the **Classification** section, select a Subsidiary from the **Primary Subsidiary** drop-down list.

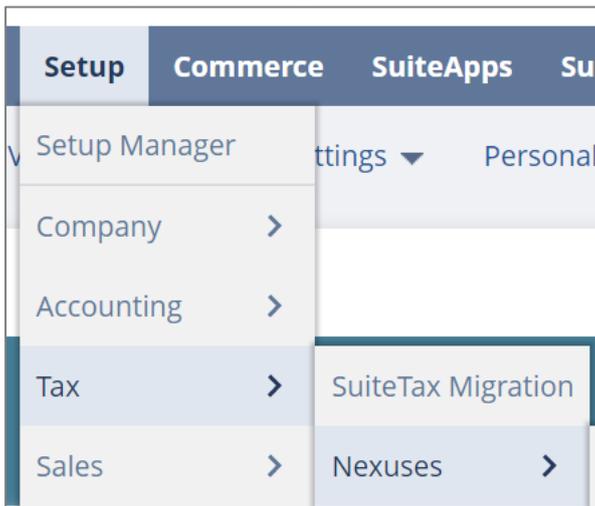


5. Click on the **Save** button.

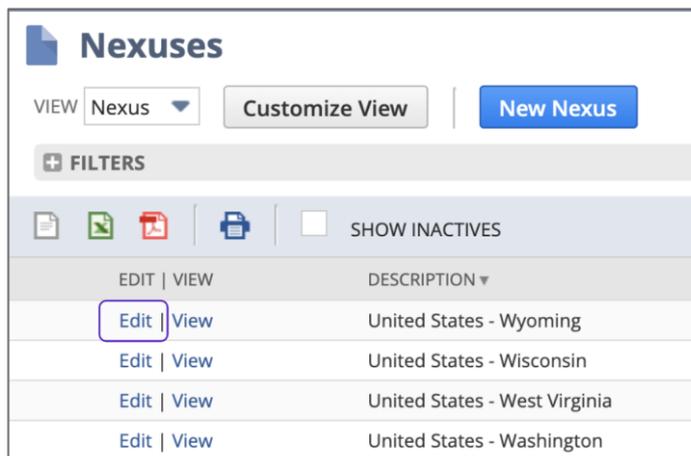


To set a Tax Agency for your Nexus, follow these steps:

1. Go to **Setup > Accounting > Nexuses**.



2. Select the Nexus and click on the **Edit** button.



3. Select a **Tax Agency** from the drop-down menu.

**Nexus**

Save Cancel Actions

COUNTRY  
United States

STATE/PROVINCE/COUNTY  
Wyoming

DESCRIPTION \*  
United States - Wyoming

PARENT NEXUS

INACTIVE  
 USE FULFILLMENT TO MODIFY TAX POINT DATE

TAX AGENCY  
- New -  
Tax Agency CA

4. Click on the **Save** button.

### Configuring Tax Types

1. Go to **Setup > Accounting > Tax Types**.

Setup Commerce SuiteApps Su

Setup Manager Settings Personal

Company >

Accounting >

Tax > SuiteTax Migration

Sales > Nexuses >

Marketing > Tax Types >

2. In the **Filters**, select a Country from the drop-down menu.

**Tax Types**

VIEW Tax Type Customize View New Tax Type

FILTERS

COUNTRY  
United States

STYLE  
Normal

3. For each Sovos Type, do the following:
  - a. Select the Tax Type.
  - b. Click on the **Edit** link.

EDIT   VIEW		NAME ▾
Edit	View	US - Sellers Use Tax
<b>Edit</b>	View	US - Sales Tax
Edit	View	US - OOS
Edit	View	US - Import Tax
Edit	View	US - Fee
Edit	View	US - Export Tax
Edit	View	US - Consumers Use Tax
Edit	View	Transit

**Note:** The Sovos Tax Types are always in the format of [Two Country Abbreviation] - [Type of Tax].

- c. Add at least one Nexus, a Payable Account, and a Receivables Account.

**Tax Type**

Save | Cancel | Actions ▾

COUNTRY: United States

NAME \*: US - Sellers Use Tax

DESCRIPTION:

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

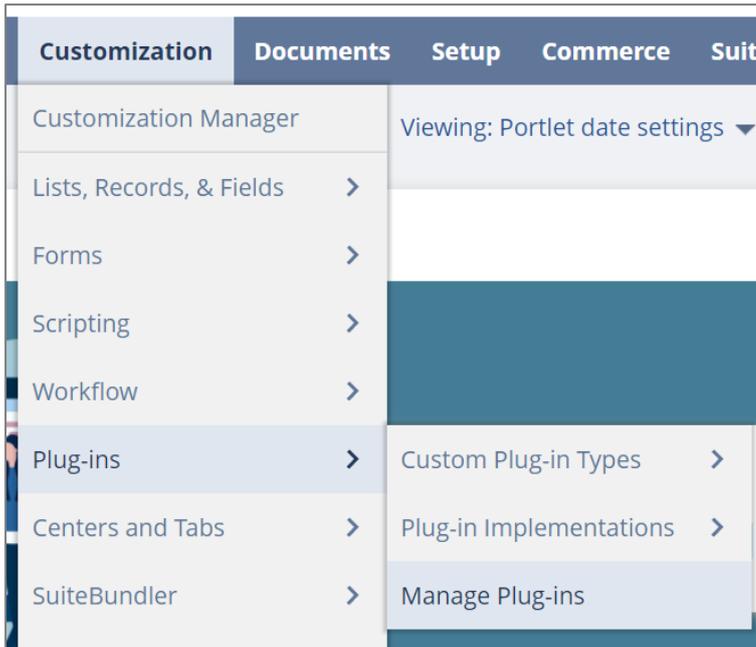
NEXUS*	PAYABLES ACCOUNT	RECEIVABLES ACCOUNT
United States - California	Accounts Payable	Accounts Receivable

OK | Cancel | + Insert | Remove

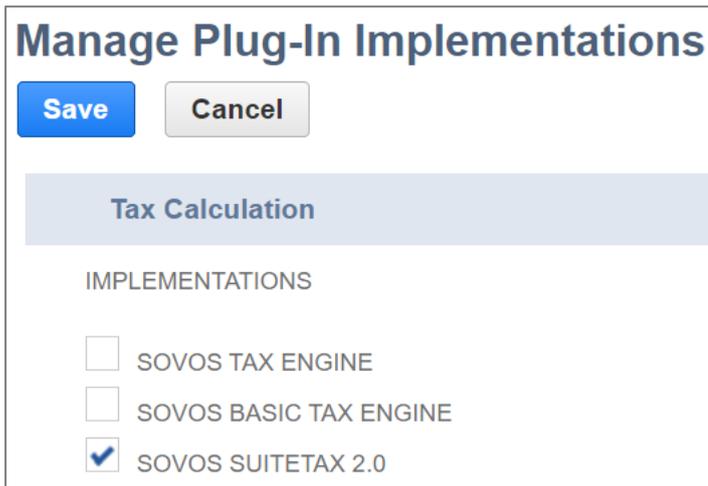
### Verifying Tax Plug-in

The Sovos Suite Tax plug-in needs to be activated for the Adapter to work. To make sure that it's activated, follow these steps:

1. Go to **Customization > Plug-ins > Manage Plug-ins**.



2. Check the **Sovos SuiteTax 2.0** box.

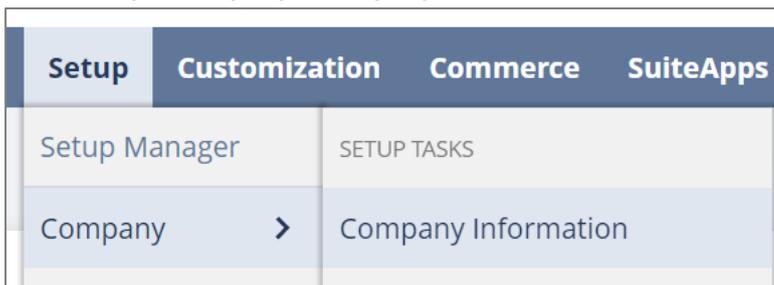


### Configuring Subsidiaries

Configuring subsidiaries requires you to activate the tax engine and add any configured Nexuses to it. This process will be different depending on whether you have a NetSuite account or a NetSuite OneWorld account.

#### Configuring the Subsidiary for a NetSuite Account

1. Go to **Setup > Company > Company Information**.



2. Click on the **Tax Registrations** tab.

Addresses	Company URLs	Tax Registrations	System Notes
COUNTRY *		NEXUS *	TAX AGENCY
United States		United States - California	Tax Agency CA
United States		United States - Illinois	Tax Agency CA

- From the **Country** drop-down menu, select a country.

Addresses	Company URLs	Tax Registrations	Sys
COUNTRY *		NEXUS *	
United States		United States - Califor	
United States		United States - Illinois	
United States		United States - Louisi	
United States		United States - Massa	
United States		United States - New Y	

- Canada
- United States

Save Cancel + Insert Remove

- From the **Nexus** drop-down menu, choose a Nexus (it must have a Tax Agency assigned to it).

Addresses	Company URLs	Tax Registrations	System Notes
COUNTRY *		NEXUS *	TAX AGENCY
United States		United States - California	Tax Agency CA
United States		United States - Illinois	Tax Agency CA
United States		United States - Louisiana	Tax Agency CA
United States		United States - Massachusetts	Tax Agency CA
United States		United States - New York	Tax Agency CA
United States		United States - Arizona	Tax Agency CA

✓ Add ✗ Cancel + Insert Remove

The **Tax Agency** field should automatically populate.

- From the **Tax Engine** drop-down menu, select **Sovos SuiteTax 2.0**.

COUNTRY*	NEXUS*	TAX AGENCY	TAX REG. NUMBER	TAX ENGINE
United States	United States - California	Tax Agency CA		Sovos SuiteTax 2.0
United States	United States - Illinois	Tax Agency CA		Sovos SuiteTax 2.0
United States	United States - Louisiana	Tax Agency CA		Sovos SuiteTax 2.0
United States	United States - Massachusetts	Tax Agency CA		Sovos SuiteTax 2.0
United States	United States - New York	Tax Agency CA		Sovos SuiteTax 2.0
United States	United States - Arizona	Tax Agency CA		

6. Select the **Effective From** date.

TAX ENGINE	EFFECTIVE DATE
Sovos SuiteTax 2.0	9/12/2016
Sovos SuiteTax 2.0	10/1/2020
Sovos SuiteTax 2.0	10/1/2020
Sovos SuiteTax 2.0	12/31/2000
Sovos SuiteTax 2.0	6/5/2019
Sovos SuiteTax 2.0	

May 2022

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4

7. Click on the **Add** button.

United States	United States - New York	Tax Agency CA	Sovos SuiteTax 2.0	6/5/2019
United States	United States - Arizona	Tax Agency CA	Sovos SuiteTax 2.0	5/10/2022

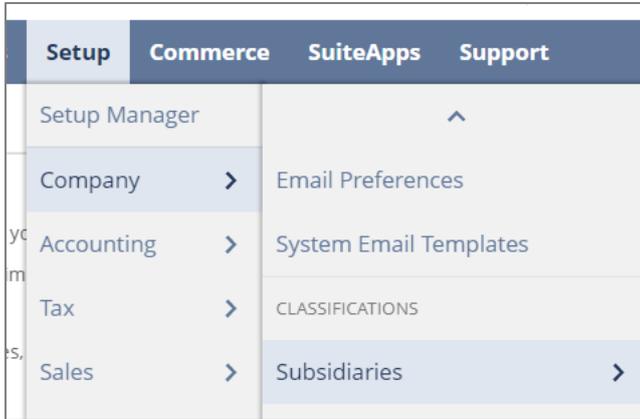
8. Click on the **Save** button.

United States	United States - Louisiana
United States	United States - Massachusetts
United States	United States - New York
United States	United States - Arizona

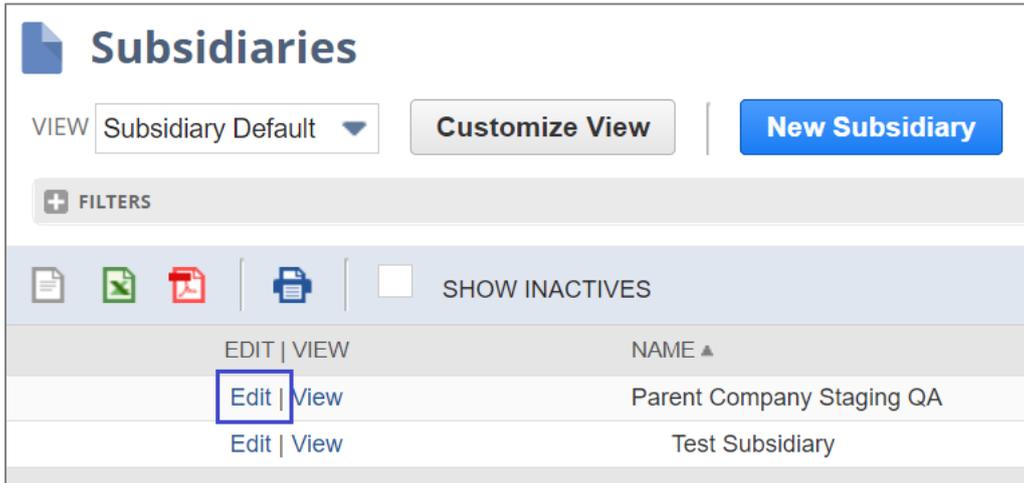
*Configuring Subsidiaries for a NetSuite OneWorld Account*

**Note:** This configuration should be performed for each Subsidiary for which the Adapter will be used.

1. Go to **Setup > Company > Subsidiaries**.



2. Click on the **Edit** link for the Subsidiary for which you want to activate the Global Tax Determination tax engine.



3. Click on the **Tax Registrations** tab.

### Subsidiary

Actions ▾

SUBSIDIARY IS INACTIVE

NAME \*

ALWAYS DISPLAY SUBSIDIARY NAME

SUBSIDIARY LOGO (FORMS)

SUBSIDIARY LOGO (PAGES)

WEB SITE

DOCUMENT NUMBER

STATE/PROVINCE \*

COUNTRY

LEGAL NAME

RETURN EMAIL ADDRESS

FAX

---

Addresses
Vendor Bill Matching
Tax Registrations
Preferences
Workflow

COUNTRY *	NEXUS *	TAX AGENCY
Saudi Arabia	Saudi Arabia	Tax Agency CA
United States	United States - Arkansas	Tax Agency CA

- From the **Country** drop-down menu, select a country.

Addresses
Vendor Bill Matching
Tax Registrations

COUNTRY *	NEXUS *
Ukraine	Saudi Arabia
United Arab Emirates	United States - Arkansas
United Kingdom	United States - California
United States	United States - Maryland
Uruguay	United States - Massachusetts
US Minor Outlying Islands	United States - New York
Uzbekistan	Uruguay

- From the **Nexus** drop-down menu, choose a Nexus. The Nexus must have a Tax Agency assigned to it.

Uruguay      Uruguay      Tax Agency UY

United Kingdom      United Kingdom      Tax Agency CA

The **Tax Agency** field should automatically populate.

- From the **Tax Engine** drop-down menu, select **Sovos SuiteTax 2.0**.

Tax Registrations			Preferences	Workflow	Translation	System Notes
TAX AGENCY	TAX REG. NUMBER	TAX ENGINE				
Tax Agency CA		Sovos SuiteTax 2.0				
Kansas Tax Agency CA		Sovos SuiteTax 2.0				
California Tax Agency CA		Sovos SuiteTax 2.0				
Maryland Tax Agency CA		Sovos SuiteTax 2.0				
Massachusetts Massachusetts Dept. of Revenue		Sovos SuiteTax 2.0				
New York Tax Agency CA		Sovos SuiteTax 2.0				
Tax Agency UY		Sovos SuiteTax 2.0				
Tax Agency CA		Sovos SuiteTax 2.0				

- Select the **Effective From** date.

TAX ENGINE	EFFECTIVE FROM*
Sovos SuiteTax 2.0	2/23/2022
Sovos SuiteTax 2.0	10/13/2017
Sovos SuiteTax 2.0	12/1/20
Sovos SuiteTax 2.0	12/1/20
Sovos SuiteTax 2.0	1/1/200
Sovos SuiteTax 2.0	10/12/2
Sovos SuiteTax 2.0	8/11/20
Sovos SuiteTax 2.0	

May 2022

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4

- Click on the **Add** button.

Uruguay      Uruguay      Tax Agency UY      Sovos SuiteTax 2.0      8/11/2021

United Kingdom      United Kingdom      Tax Agency CA      Sovos SuiteTax 2.0      5/10/2022

- Repeat steps 4-8 for all Nexuses for which the Tax Agency has been set.
- Click on the **Save** button.

Addresses		Vendor Bill Matching		Tax Registrations	
COUNTRY *		NEXUS *			
Saudi Arabia		Saudi Arabia			
United States		United States - Arkansas			
United States		United States - California			
United States		United States - Maryland			
United States		United States - Massachusetts			
United States		United States - New York			
Uruguay		Uruguay			
United Kingdom		United Kingdom			
<input type="text"/>		<input type="text"/>			
<input type="button" value="Add"/>		<input type="button" value="Cancel"/>		<input type="button" value="Insert"/>	
<input type="button" value="Remove"/>					

Actions ▾

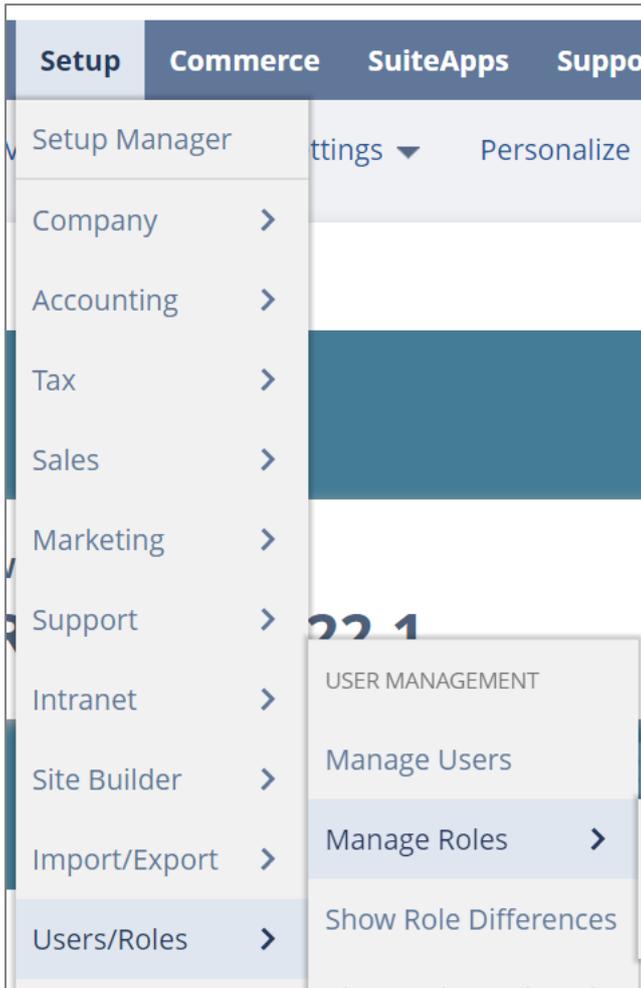
Configuring the Sovos Tax Engine Role

To use Sovos' tax engine, users must have access to the Sovos Tax Engine role in NetSuite.

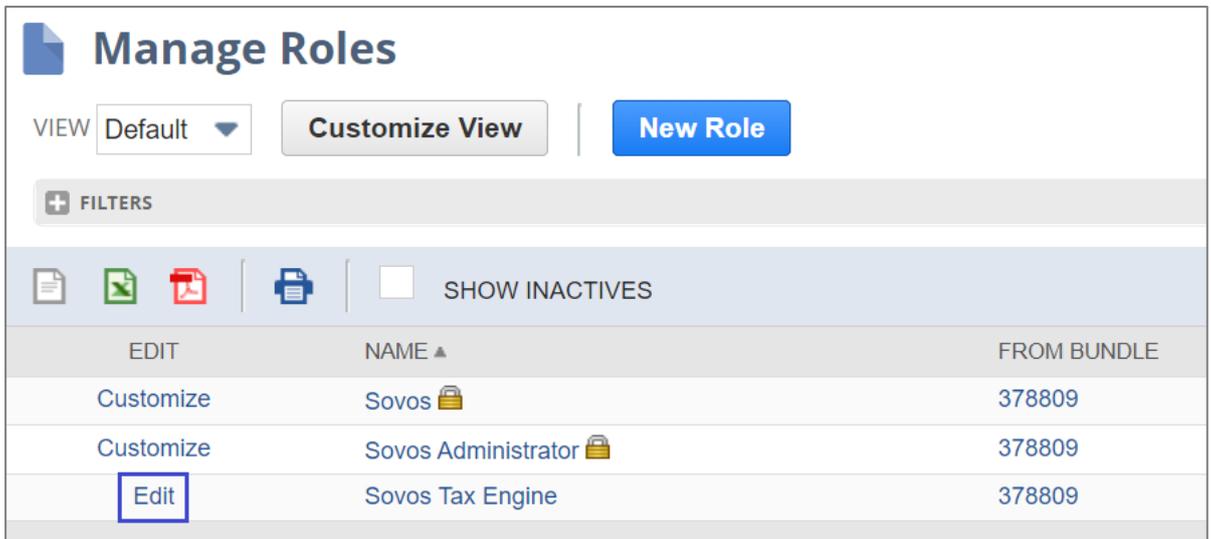
**Note:** This configuration is only for NetSuite OneWorld accounts.

The Sovos Tax Engine role must be configured to function properly. To do this, follow these steps:

1. Go to **Setup > Users/Roles > Manage Roles**.



2. On the **Manage Roles** screen, click on the **Edit** link in the **Sovos Tax Engine** row.



3. In the **Subsidiaries** list on the **Role** screen, select every Subsidiary that you want to use Sovos' tax engine.

4. Click on the **Save** button.

### Enabling the Voiding of Transactions

If you want to cancel a saved posting transaction in NetSuite, you can delete or void the transaction as long as it's in the pending state in the Global Tax Determination. To turn this feature on in the Adapter, follow these steps:

1. Go to **Setup > Accounting > Accounting Preferences**.

2. Clear the **Void Transactions Using Reversing Journals** check box.

**Accounting Preferences**

Save Cancel

General Items/Transactions Order Management Time &

**General Ledger**

USE ACCOUNT NUMBERS

USE LEGAL NAME IN ACCOUNT

SHOW ALL TRANSACTION TYPES IN RECONCILIATION

EXPAND ACCOUNT LISTS

CASH BASIS REPORTING

AGING REPORTS USE

TRANSACTION DATE

DUE DATE

VOID TRANSACTIONS USING REVERSING JOURNALS

SET REVERSAL VARIANCE DATE EQUAL TO THE REVERSING

REQUIRE APPROVALS ON JOURNAL ENTRIES

3. Click on the **Save** button.

**Accounting Preferences**

Save Cancel

General Items/Transactions Orde

**General Ledger**

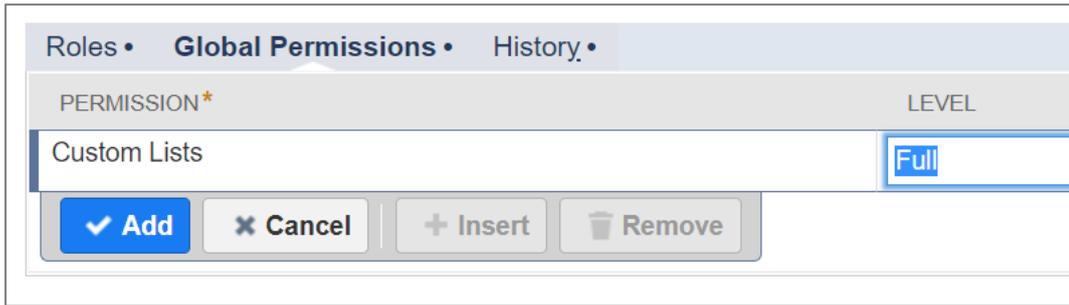
USE ACCOUNT NUMBERS

### Granting Sovos Account Close Suitelet Permission

The Sovos Tax Integration Package includes an Account Close Suitelet that can be used to permanently commit transactions to the Global Tax Determination audit tables. For a user to have access to this Suitelet, they must be granted the **Sovos** user role. To add the Sovos user role to a user, follow these steps:

1. Performs steps 1-4 of the Granting Sovos Credential Configuration Permission to Select Users section on page 8 of this guide.
2. On the **Roles** sub-tab, select **Sovos** from the Role drop-down menu on an empty row.





3. Repeat step 2 for the following permissions and levels.

Currency -> View

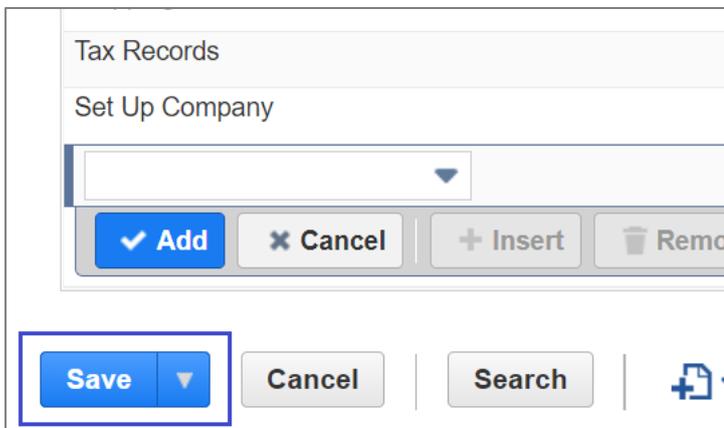
Shipping Items -> View

Tax Records -> View

Set Up Company -> Full



4. Click on the **Save** button.

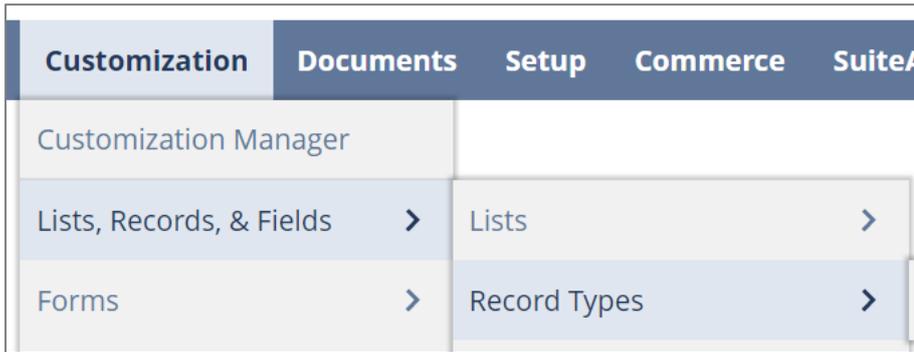


### Configure Discounts

#### *Configure the Sovos Customization Element*

To use discounts, you need to configure a Sovos Customization Element to map the discounts in NetSuite to the Discounts in Sovos. To set up a Sovos Customization Element, follow these steps:

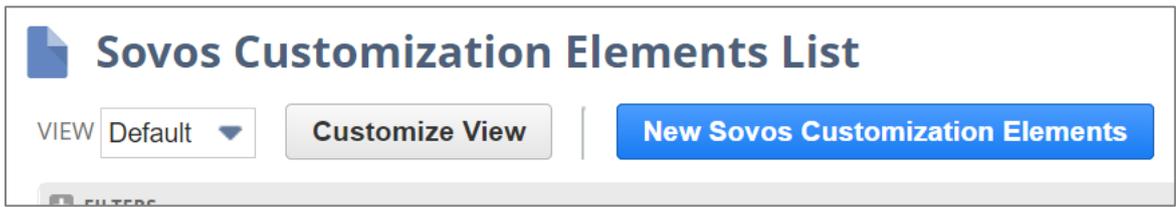
1. Go to **Customization > Lists, Records & Fields > Record Types**.



2. Click on **List** for the **Sovos Customization Elements**.



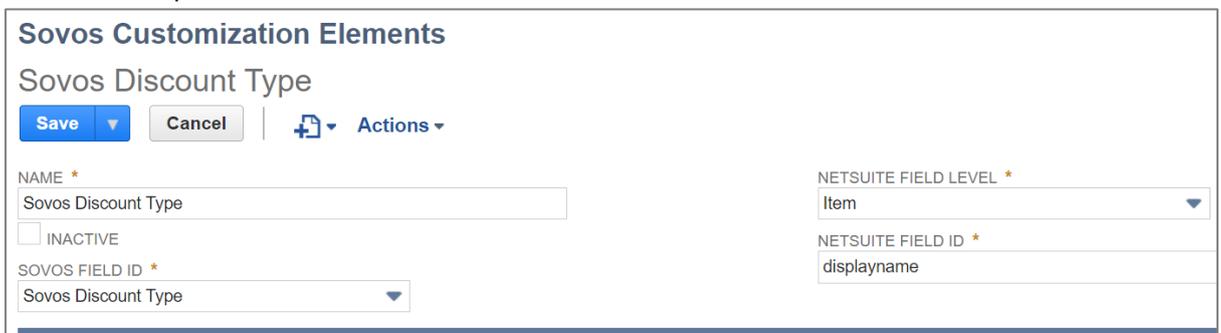
3. Click on the **New Sovos Customization Elements** button to create the **Sovos Discount Type**.



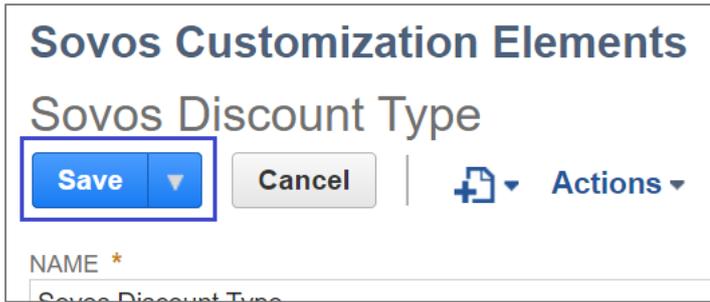
**Note:** There should be only one Sovos Customization Element for Discounts, otherwise you will get an error message.

4. Fill out the required fields:
  - a. **Name:** Sovos Discount Type.
  - b. **Sovos Field ID:** Discount Type.
  - c. **NetSuite Field Level:** Item.
  - d. **NetSuite Field ID:** displayname.

**Note:** Name, Sovos Field ID and NetSuite Field Level fields must be filled out as shown. The NetSuite Field ID is the ID of the NetSuite field that will be mapped. It can be **displayname** for the Display Name/Code field or **description** for the Description field.



5. Click on the **Save** button.



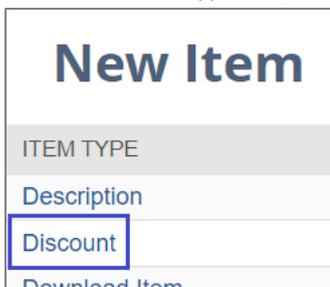
*Creating a Discount*

To apply a discount to a transaction, a Discount Item must already exist in NetSuite. To create a discount item, follow these steps:

1. Go to **Lists > Accounting > Items > New**.



2. From the Item Type list, select **Discount**.



3. In the Primary Information section:
  - a. In the **Item Name/Number** field, enter an identifier for the discount.
  - b. In the **Rate** field, enter the dollar amount or percentage that will be discounted from the transaction. Rates should be positive values.  
**Note:** If the Rate field has a negative value, you will encounter an error when applying the discount to a transaction.
  - c. In the **Display Name/Code** field (or the field that you selected to map the Discount Type), enter the integer value for a corresponding discount type. The values are mapped to discount types as follows:
    - 1 – Discount
    - 2 – Prompt Payment Discounts
    - 3 – Quantity Discounts
    - 4 – Retailer Coupon

- 5 – Manufacturer Coupon
- 6 – Rebates
- 7 - Trade-Ins
- 8 – Reward Program/Retailer Coupons
- 9 – Reward Program/Manufacturer Promotions
- 10 – Reward Program/Credit Card Company
- 11 – Gift Voucher

**Note:** If you have questions about which discount type to select, contact your Sovos Professional Services representative.

4. On the **Accounting** subtab, select an **Account** from the drop-down menu.

5. Click on the **Save** button.

## Using the Bundle

### User Procedures

For information on Supported Transactions, Adapter Triggers, Detailed Use Cases, and Field Mappings, refer to the Global Tax Determination Adapter for NetSuite Functional Guide.

### Testing a Sales Order

To test the Adapter with a Sales Order, follow these steps:

1. Go to **Transactions > Sales > Enter Sales Orders**.



2. Select a Customer from the **Customer** drop-down menu.

The screenshot shows the 'Primary Information' section of a form with the following fields:

- CUSTOM FORM \*: Standard Sales Order - Invoice
- ORDER #: To Be Generated
- CUSTOMER \*: QA-NY
- PROJECT: (empty)

3. In the **Items** tab
  - a. Select an Item from the **Item** drop-down menu.
  - b. Enter a value into the **Quantity** field.
  - c. If necessary, enter a value into the **Rate** field.

The screenshot shows the 'Items' tab with various settings and a table of items.

Settings:

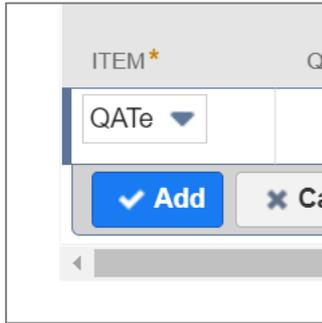
- ENABLE ITEM LINE SHIPPING:
- COUPON CODE: <Type then tab>
- PROMOTION: (empty)
- DISCOUNT ITEM: (empty)
- RATE: (empty)
- PRICES INCLUDE TAX:

Buttons: Add Multiple, Upsell Items, Clear All Lines, Calculate

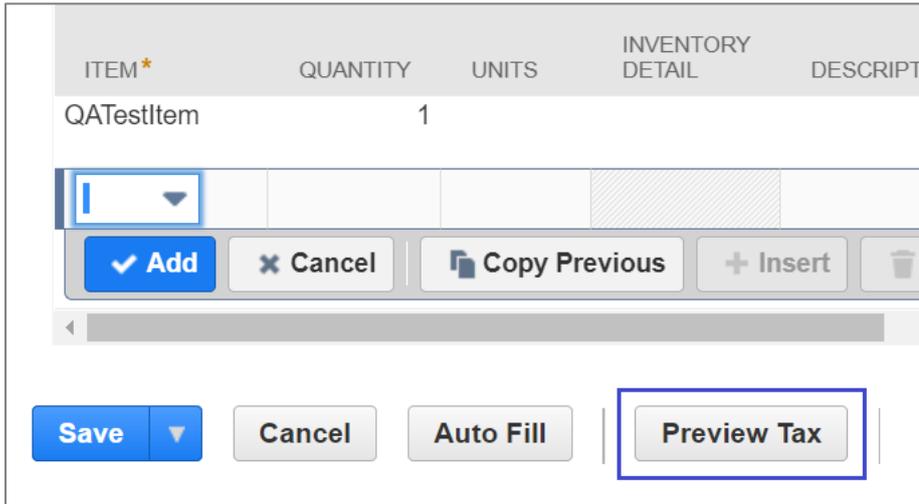
ITEM*	QUANTITY	UNITS	INVENTORY DETAIL	DESCRIPTION	PRICE LEVEL	RATE	AMOUNT*
QATe	1				Base Price	100.00	100.00

Buttons: Add, Cancel, Copy Previous, Insert, Remove

- d. Click on the **Add** button to add the line item to the Sales Order.



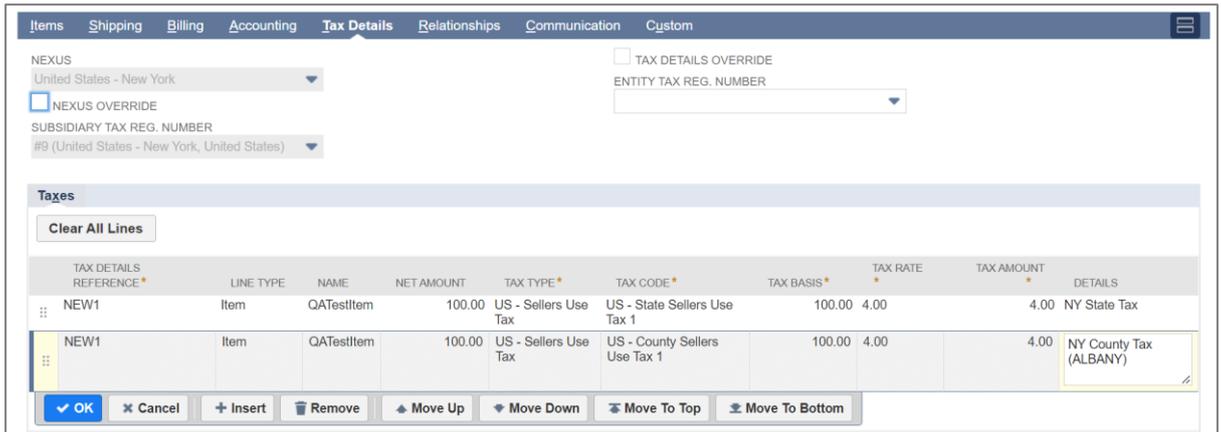
- 4. Click on the **Preview Tax** button.



- 5. Check that the appropriate tax is shown in the Summary box.

Summary	
SUBTOTAL	100.00
DISCOUNT ITEM	0.00
TAX TOTAL	8.00
US - SELLERS USE TAX	8.00
SHIPPING COST	0.00
HANDLING COST	0.00
GIFT CERTIFICATE	0.00
<hr/>	
TOTAL	108.00

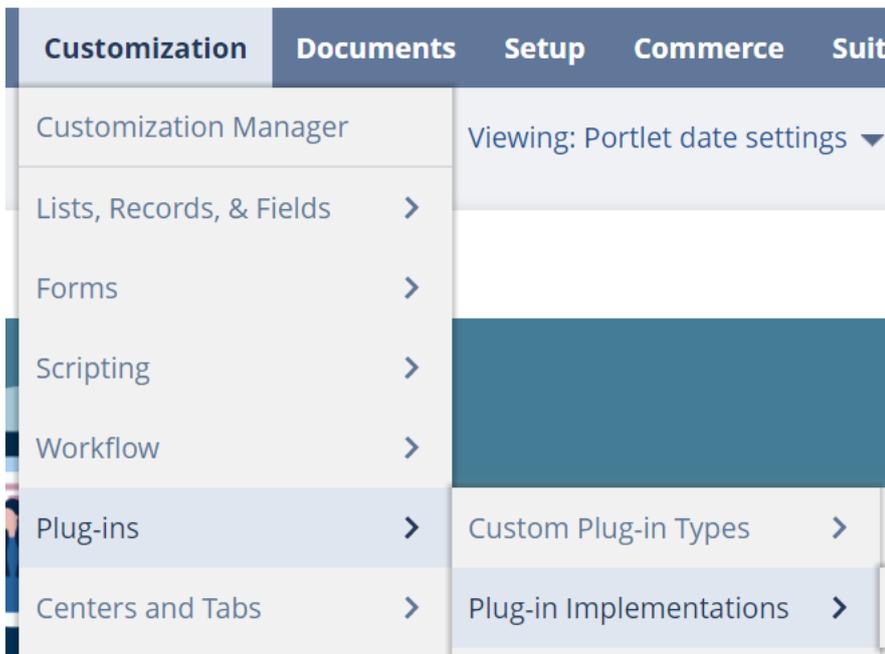
- 6. Select the **Tax Details** tab and check that the correct tax lines were created.



### Verify the Adapter Calls

To verify the calls made from the Adapter, follow these steps:

1. Go to **Customization > Plug-ins > Plug-in Implementations**.



2. Click on the **View** link for the Sovos SuiteTax 2.0 plug-in.

### Plug-In Implementations

**New Plug-In Implementation**

**FILTERS**

TYPE: Tax Engine | SCRIPT FILE: - All - | FROM BUNDLE: 378809

SHOW INACTIVES

EDIT   VIEW	NAME ▲	FROM BUNDLE	ID
<a href="#">View</a>	Sovos Basic Tax Engine	378809	customscript_sovos_basic_tax_engine
<a href="#">View</a>	Sovos SuiteTax 2.0	378809	customscript_sovos_suitetax_2
<a href="#">View</a>	Sovos Tax Engine	378809	customscript_sovos_suitetax

- Click on the **Execution Log** sub-tab to see the calls from the Adapter.

**Plug-In Implementation**

**Actions** ▼

TYPE Tax Engine	STATUS Released	DESCRIPTION SuiteTax Plug-in 2.0 for Tax Calculation
NAME Sovos SuiteTax 2.0	LOG LEVEL Debug	OWNER Federico Trejo
ID customscript_sovos_suitetax_2	EXECUTE AS ROLE Sovos Tax Engine	<input type="checkbox"/> INACTIVE
API VERSION 2.0		

Scripts | Unhandled Errors | **Execution Log** | History | System Notes

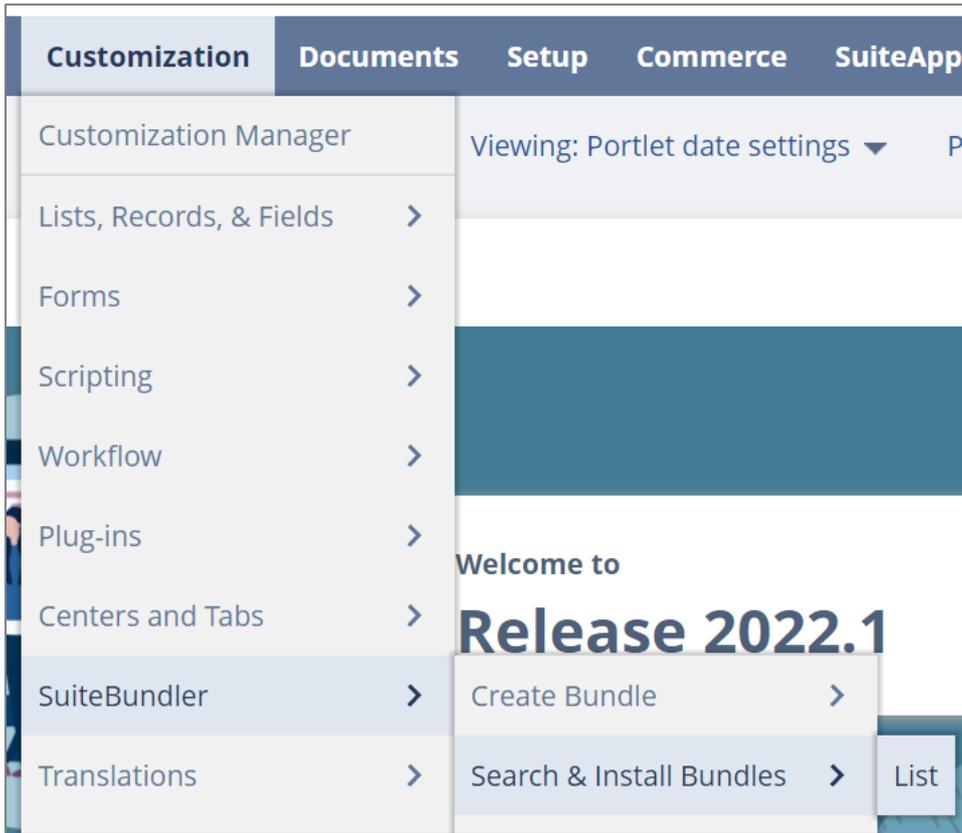
VIEW: Custom Default Script Notes View | TYPE: - All - | DATE: today | FROM: 5/16/2022 | TO: 5/16/2022

[Customize View](#) | [Remove all](#) | [Refresh](#)

#	VIEW	TYPE	TITLE	DATE ▼	TIME	USER	DETAILS
1	<a href="#">View</a>	Debug	Sovos SuiteTax	5/16/2022	6:46 am	Federico Trejo	attempt: 1 for url: https://tweadaptersuat.taxware.net/core_adapter/api/netsuite/calculate

### Updating the Bundle

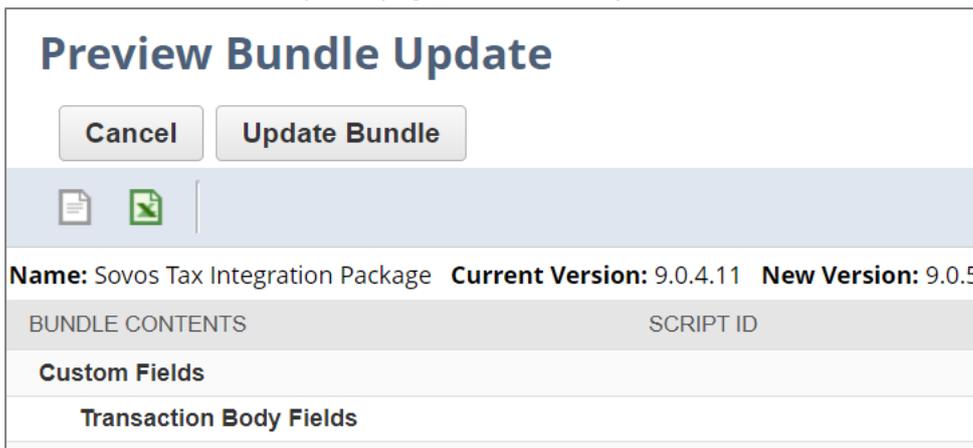
- Go to **Customization > SuiteBundler > Search & Install Bundle > List** to view a list of currently installed bundles in your NetSuite environment.



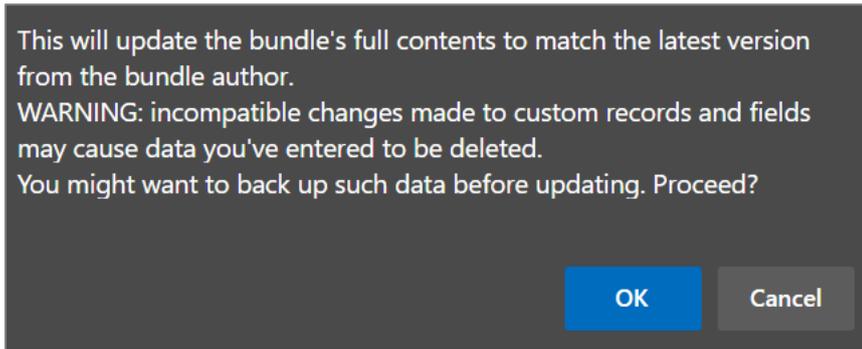
2. Hover over the **Action** icon and select **Update** from the drop-down menu.

Package Name	Package ID	Version	Is Active	Description	Status	Script ID
Sovos Tax Integration Package	378809	9.0.5	No	Package Configures NetSuite Account to connect to Sovos' Taxware Enterprise for tax calculations.	✓	SOVOS SUITETAX (TSTDV2419259)

3. On the Preview Bundle Update page, click on the **Update Bundle** button.



4. A confirmation box will appear. Click **OK** to update the bundle.

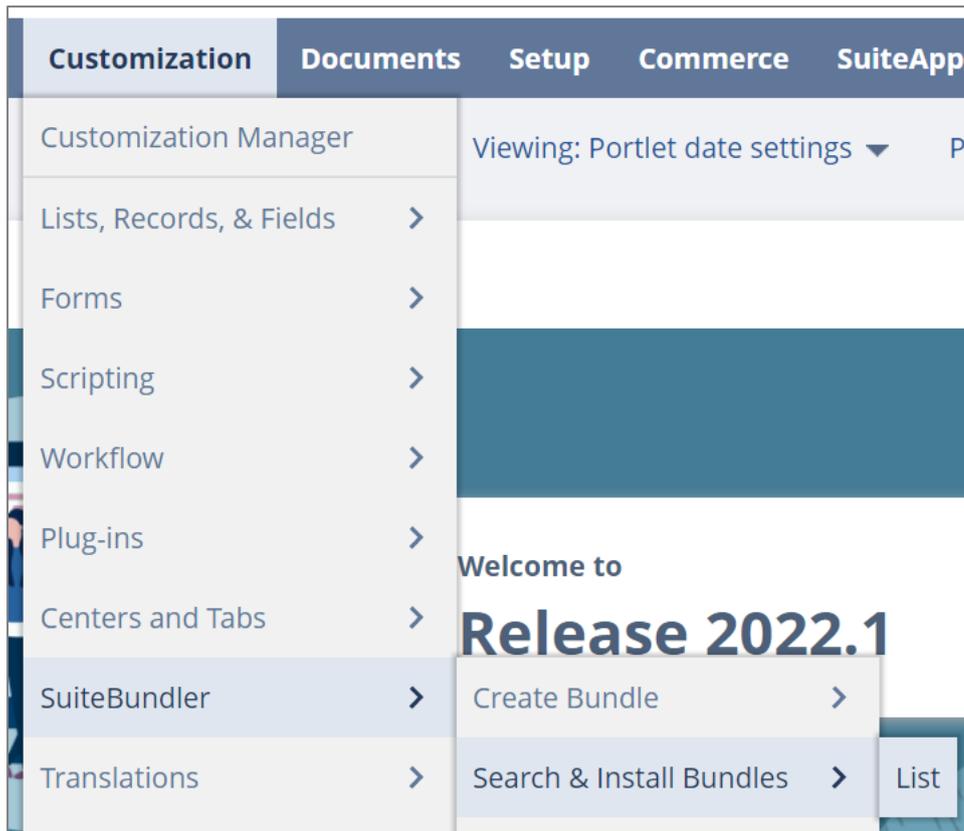


On the **Installed Bundles** screen, you'll see a Pending status if the installation is still in progress.

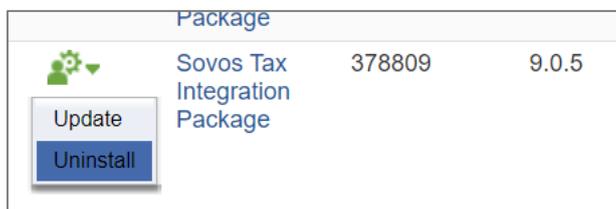
Once the installation is complete, you'll see a green checkmark in the Status column.

## Uninstalling the Bundle

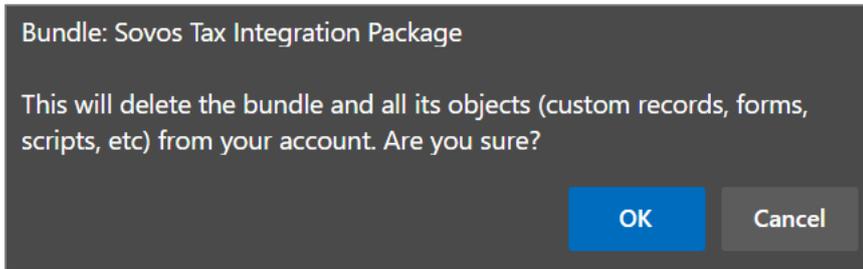
1. Go to **Customization > SuiteBundler > Search & Install Bundle > List** to view a list of currently installed bundles in your NetSuite environment.



2. Hover over the **Action** icon and select **Uninstall** from the drop-down menu.



3. A confirmation box will appear. Click **OK** to delete the bundle and all its components.



## Support and Service

If you experience issues or have questions regarding this product, contact Sovos Support or submit a case in the Sovos Portal through the following URL: <https://sovos.com/portal>.