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Introduction To OMX Setup

This guide describes how to set up and start using your OMX system. Begin by completing the following basic tasks, as described in this guide:

- Add users
- Set up keycodes
- Set up tax codes
- Set up shipping methods

What Is OMX?

OMX is a cloud-based, order-and-fulfillment management system that centralizes all aspects of your company's back-end operations, including:

- Order Capture
- Fulfillment
- Inventory Management
- Payment Processing
- Database Management
- Reports Generation

Understanding the OMX Interface

This section introduces you to components of the OMX interface, including:

- Shortcuts
- Tabs and Menus
- Dashboards and Widgets
- Pages and Windows

Shortcuts

OMX includes the following navigation aids that you can use to move around quickly in OMX:

- Click the magnifying glass to display the Item Search window on the Information Center page.
Use the Select Action list to jump to frequently-used OMX screens.

Enter the one- to three-letter command shortcut into the command line below the Select Action list. See Table of Command Shortcuts.

Click the breadcrumb symbols beside Select Action to return to recently-viewed items, orders, customers, keycodes, promotions, and leads.

Tabs and Menus

The OMX interface features a row of tabs along the top. Each tab represents a specific functional area of OMX.

OMX menu titles display along the blue-green bar below the tabs.

To see more menu choices, click the plus sign on the right side of the menu bar to expand the menu. Click the minus sign to hide the choices.

You can customize the menus that appear on this bar by creating user profiles. See Creating a User Profile.

Dashboards and Widgets

Dashboards create a consistent and logical workflow for the major roles in an e-commerce organization.

OMX includes the following role-based dashboards, each representing a specific function in the e-commerce workflow:

- Merchandising
- Marketing
- Customer service
- Warehouse

Each dashboard contains widgets and menu items that include tasks, links, tools, and key performance indicators that are relevant to their role. You can configure each dashboard by adding or removing widgets or changing the layout. You can also view a dashboard as a different user.
To display a dashboard for one of these roles, click the tab for that role, then click the **Show Dashboard** icon.

## Pages and Windows

Click a menu item to go to the page for that item. For example, to change settings for a particular item, click the **Merchandising** tab, then the **Manage: Items** menu to display the Manage Item page.

### Manage Item

Pages contain windows. Related fields within a window are grouped into smaller windows. For example, the Manage Item page shown here contains a Find Item window, and the Find Item window contains these smaller windows:

- by Item Data
The Configure Your Account Page

You can access setup tasks from the Setup window on the Configure Your Account page.

To display the Configure Your Account page, on the Setup tab, click Configure: Your Account.

The Setup page is divided horizontally into sections. Each section contains links to related pages. For example, to set up Refund File Types in OMX, click the Refund Files link in the Fulfillment and Shipping section to display the File Types page.

Table of Command Shortcuts

All of the available shortcut commands are listed in the following table:

<table>
<thead>
<tr>
<th>Command</th>
<th>Description</th>
<th>Syntax</th>
</tr>
</thead>
<tbody>
<tr>
<td>acc</td>
<td>Enables you to switch accounts by specifying an account name.</td>
<td><code>acc account name</code></td>
</tr>
<tr>
<td>adj</td>
<td>Displays the Create Inventory Adjustment window for a specified item.</td>
<td><code>adj</code></td>
</tr>
<tr>
<td>c</td>
<td>Displays information about the specified customer, or enables you to search for a customer.</td>
<td>One of:</td>
</tr>
<tr>
<td>Command</td>
<td>Description</td>
<td>Syntax</td>
</tr>
<tr>
<td>---------</td>
<td>-----------------------------------------------------------------------------</td>
<td>----------------------------</td>
</tr>
<tr>
<td>cah</td>
<td>Displays customer address history.</td>
<td>cah customer number</td>
</tr>
<tr>
<td>cm</td>
<td>Displays Merge Customer page.</td>
<td>cm</td>
</tr>
<tr>
<td>e</td>
<td>Displays Order Exception Detail page.</td>
<td>e order exception ID</td>
</tr>
<tr>
<td>i</td>
<td>Displays the Manage Item page for the specified item, or enables you to search for an item.</td>
<td>One of: i, inv item code</td>
</tr>
<tr>
<td>inv</td>
<td>Displays the View Inventory page for a specified item or enables you to search for an item.</td>
<td>One of: inv item code</td>
</tr>
<tr>
<td>is</td>
<td>Displays the Item Detail page.</td>
<td>is supplier item code</td>
</tr>
<tr>
<td>ito</td>
<td>Enables you to intercept a temporary order so that the order can be completed.</td>
<td>ito temporary order id</td>
</tr>
<tr>
<td>k</td>
<td>Displays the Manage Keycode page for the specified keycode, or enables you to search for a keycode.</td>
<td>One of: k, k keycode</td>
</tr>
<tr>
<td>lc</td>
<td>Enables you to access the mostly recently viewed customer.</td>
<td>lc</td>
</tr>
<tr>
<td>lim</td>
<td>Enables you to view the last incoming message in the queue.</td>
<td>lim message id</td>
</tr>
<tr>
<td>lo</td>
<td>Enables you to access the most recently viewed order or quote.</td>
<td>lo</td>
</tr>
<tr>
<td>lto</td>
<td>Displays the last temporary order viewed.</td>
<td>lto</td>
</tr>
<tr>
<td>mp</td>
<td>Enables you to access marketing discount policies.</td>
<td>One of: mp, mp policy number</td>
</tr>
<tr>
<td>no</td>
<td>Displays order details for the newest order created in your OMX system.</td>
<td>no</td>
</tr>
<tr>
<td>o</td>
<td>Displays order details for the specified order number, or enables you to search for an order.</td>
<td>One of: o, o order number</td>
</tr>
<tr>
<td>oah</td>
<td>Displays customer address history for the specified order number.</td>
<td>oah order number</td>
</tr>
<tr>
<td>poe</td>
<td>Displays the Select Supplier for Purchase Order window that lets you:</td>
<td>One of: p, p promotion</td>
</tr>
<tr>
<td>Command</td>
<td>Description</td>
<td>Syntax</td>
</tr>
<tr>
<td>---------</td>
<td>-------------</td>
<td>--------</td>
</tr>
<tr>
<td>poe</td>
<td>create a purchase order for a specified supplier</td>
<td>poe supplier ID</td>
</tr>
<tr>
<td></td>
<td>search for a supplier</td>
<td></td>
</tr>
</tbody>
</table>

**pom** Enables you to manage a purchase order, or search for a purchase order to manage.<br>
Syntax: One of:<br>
- pom<br>- pom purchase order

**rec** Enables you to search for an open purchase order for receiving items.<br>
Syntax: One of:<br>
- rec<br>- rec purchase order number

**s** Displays the Source Tracker page for a specified source, or enables you to select from a list of sources.<br>
Syntax: One of:<br>
- s<br>- s source ID

**sh** Displays the Order Tracking page for the specified shipment.<br><br>**sr** Displays the Order Tracking page for the specified order.<br>

**ss3** Enables you to create a SmartSelect header.<br>
Syntax: One of:<br>
- ss3<br>- ss3 selection ID

**st** Displays the Shipment Transmission Tracking page for the specific shipment.<br>
Syntax: st shipment number

**str** Enables you to search for a store, or manage a specified store.<br>
Syntax: One of:<br>
- str<br>- str store code

**sup** Enables you to search for a supplier or to manage an existing one.<br>
Syntax: One of:<br>
- sup<br>- sup supplier ID

**support** Displays the Support page.<br>
Syntax: support

**whs** Displays the Manage Warehouse page for a specified warehouse.<br>
Syntax: whs warehouse code

**y** Enables you to display an order using the alternate ID for that order, or search for an order using the alternate ID.<br>
Syntax: One of:<br>
- y<br>- y alternate ID

**Note:** Not all orders have an alternate ID.
Users and User Profiles

You need to be logged in as an Administrator to complete the tasks in this section.

Users

This section gives you a basic understanding of users within OMX.

Introduction To Users In OMX

Note: The OMX Professional Services (PS) team is usually involved in onboarding all new client accounts. Your initial account setup depends upon the output of your onboarding in cooperation with PS.

OMX has different types of users that can use various features of the product to provide different levels of security for your account.

Your account is initially configured with one user. You can use this user to log into OMX and start adding more users.

Each account can have many users. Every user requires a user name and password, but all other values that you can specify are optional.

You can restrict access to OMX through the user profile, assigning as a supervisor, or through the IP address.

Quick information about each user is included in the User SmartLabel.

Each user belongs to a user profile. The user profile indicates the dashboards, widgets, and sub-menu items that a user can access. User Profiles provide OMX administrators with the ability to control and customize access to dashboards, widgets, and sub-menu Items for users. For more information, see User Profiles.

Supervisor Status

Regardless of the user profile to which a user belongs, every user can be a supervisor.

A supervisor has access to the Admin button for orders, which enables that person to change prices for items. A person may not require access to all modules, but may need to change prices for preferred customers. Supervisor status is most commonly used on the Data Entry profile.

User Groups

You can create user groups to organize users into logical units. You can use the groups to distinguish between different office locations, geographic groups, and so on. User groups are created by the user.

User SmartLabel

Every user in your account has a SmartLabel, which provides at-a-glance information about the selected user. The SmartLabel appears at the top of every user page.

An example is shown here:
The SmartLabel displays the following information:

- **Icon** (hyperlink) – The user icon.
- **User** – The name of the user.
- **Name** – The description of the user.
- **Group** – The group to which the user belongs.
- **Profile** – The profile of the user.
- **Address** – The mailing address for the user.

The icon on the right side of the SmartLabel is a link to User Tracking. User Tracking is the simplified audit log that tracks the user that most recently updated the information about this user.

From the SmartLabel, you can click the user icon hyperlink to view recent activity.

### Viewing the List of Users

You can view the list of existing users.

**To view the list of users:**

1. On the **Setup** tab, click Configure: **Your Account**.
2. In the General section of the Setup window, click **Users**.
   - The Existing Users window appears.

<table>
<thead>
<tr>
<th>Description</th>
<th>User</th>
<th>Super</th>
<th>Group</th>
<th>Email</th>
<th>Last Session</th>
<th>Active</th>
</tr>
</thead>
<tbody>
<tr>
<td>Test</td>
<td>TESTACCOUNTS</td>
<td>☑</td>
<td></td>
<td>tjt.com</td>
<td>3/4/2020 9:01:00 AM</td>
<td></td>
</tr>
<tr>
<td>Customer Service</td>
<td>CUSTOMERSERVICE</td>
<td>☑</td>
<td></td>
<td><a href="mailto:custuser@ordermotion.com">custuser@ordermotion.com</a></td>
<td>3/26/2017 3:53:00 PM</td>
<td>☑</td>
</tr>
<tr>
<td>Guest User UK</td>
<td>DEMO.UK</td>
<td>☑</td>
<td></td>
<td><a href="mailto:demo@ordermotion.com">demo@ordermotion.com</a></td>
<td>1/4/2020 12:27:00 PM</td>
<td>☑</td>
</tr>
</tbody>
</table>

This window lists all users that exist in your account.

Users are organized by user profile.

This window displays the name, description, group, and email address for each user.

The window also indicates whether the user is a supervisor and whether the user is active.

3. You can perform the following operations:
   - **Add a user.** See [Adding a User](#).
Update a user. See Updating a User.

Adding a User

This section describes how to add a new OMX user.

Nota: When you set up a user, OMX assumes that you have already created user profiles to define the different types of users. For details, see Creating a User Profile.

To add a new OMX user:

2. In the General section of the Setup window, click Users.
3. On the Existing Users window, click Add User.
   The New User window appears.

4. Check the Active box.
5. In the User Name field, enter the user name.
The user name cannot contain spaces.

**Tip:** It is best practice to create user names based on job functions rather than people’s names. You can reassign any user name (with a new description and password) to a different person in the future.

6. In the **Description** field, enter a description of the user.
   The description can contain spaces.

7. In the **E-Mail** field, enter the user’s email address.
   OMX uses this value when the user is responsible for receiving fulfillment files, alerts, and so on.

8. Use the **Time Zone** list to select the user’s time zone.
   OMX requires this value so that it can record the time for certain transactions, and so that the calendar can display correct information.
   This value defaults to Greenwich Mean time.

9. Use the **Locale** list to select the language to show for this user throughout OMX.
   This field affects the formats for date, time, numeric values, month names, day of the week, and currency.

10. In the **Security** section, review and complete the following options:
    - From the **User Profile** list, select the desired profile.
    - (optional) To prevent the user from customizing their dashboard, check the **Do Not Allow Dashboard Personalization** box.

11. (optional) In the **User Group** field, enter the group to which the user will belong.
    This value can contain letters or numbers, but no spaces.

12. If you want the user to be able to adjust the price of items in an order, check the **Supervisor** box.

![Note](image)

**Note:** The Home URL field is not used.

13. In the **Session Timeout** field, enter the number of minutes of inactivity after which the user is logged out from the session.
    The default value is 15 minutes.

14. In the **Restrict Access by IP-Addresses** field, enter one or more IP addresses allowed to access this account.
    If you populate this field with one or more IP addresses, the user can only access the account from the IP addresses specified.
    You can enter multiple address by entering each IP address on a separate line.

15. In the **Password Options** section, review and complete the following options:
    - In the **Password Expiry** field, indicate how long (in days) the password remains valid. After this time period elapses, the user must change their password before completing the login. Allowable values (days) are 1–365. The default value is 90.
    - If the user is allowed to change their own password, check the **User Can Change Password** box. If the user can change their password, they can do so from My Profile. An administrator can always change the password when updating the user.
    - Check the **User Must Change Password at Next Logon** box if the user must change their password the next time they log on. Check this box when the user has been assigned a password by an administrator, and should create their own password for security reasons.
In the **Consecutive failed attempts before User Lockout** field, enter the number of times that a user can enter incorrect login information.

**Note:** You cannot check this box unless the User Can Change Password box is checked.

- In the **Lockout period (minutes)** field, enter the number of minutes that a user remains locked out. After this period is over, the user can try to log in again. Allowable values (minutes) are 0–99999.

- Leave the **User currently locked out** box unchecked. If the user ever gets locked out, you can open their user profile and clear this box to let them back in.

16. In the Announcement Preferences section, clear the alerts and communications that do not apply to this user.

17. Click the Unlock Now button.

   OMX prompts you to enter your password (this is your normal OMX password).

18. Type your password, then click Unlock.

19. Click Update.

### Updating a User

**Updating a User**

Administrator users can update all aspects of a user except for the user name.

**Note:** After updating user information, the user must log in for the changes to take effect.

**To update a user:**

2. In the General section of the Setup window, click Users.
3. On the Existing Users window, click the hyperlink for the user that you want to update.
   
   The User Information window appears.
4. Make all required changes to the fields. For details on specific fields, see Adding a User.
5. Click Unlock Now.
   OMX prompts you to enter your password (this is your normal OMX password).
6. Type your password, then click Unlock.
7. Click Update.

Changing a User’s Address

You can change a user’s address, as well as their phone number and email address. OMX uses the mailing address to auto-complete fields when creating purchase orders.

To change a user’s address:
2. In the General section of the Setup window, click Users.

3. On the Existing Users window, click the hyperlink for the user whose address you want to change.

4. On the User Information window, click Change Address.
   The User Address window appears.

   ![User Address Window](image)

   - In the Name section, update the title, first name, middle initial, and last name of the user as needed.
     The first and last name values are required.
     You can enter a maximum of 40 characters for the first and last names, and one character for the middle initial.
   - (optional) In the Company field, update the name of the company that is associated with the user as required.
   - In the Address section, update the mailing address of the user as needed.
     The first line of the address, plus the ZIP, City, and State values are required.
   - Use the Country list to update the country where the user is located as needed.
     The default value displays the selection made from Customer Base.
   - (optional) In the Phone Number field, update the telephone number of the user as needed.
   - In the Email field, update the email address of the user as needed.
   - Click Update.

Deactivating a User

You can deactivate a user when required (for example, when someone leaves the company).

**To deactivate a user:**

2. In the General section of the Setup window, click Users.
3. On the Existing Users window, click the hyperlink for the active user you want to deactivate.
4. On the User Information window, clear the Active box.
5. Click the Unlock Now button.
   OMX prompts you to enter your password (this is your normal OMX password).
6. Type your password, then click Unlock Now.
7. Click Update.

User Profiles

User Profiles provide OMX administrators with the ability to control and customize access to dashboards, windows, and menu items for users.

OMX permits you to create your own unique user profiles. OMX also includes default user profiles with related dashboards:
- Accountant
- Merchandising
- Marketing
- Customer Services
- Executive
- Administrator
- Warehouse

Each default dashboard contains widgets and menu items. With administrator permission, you can define the dashboards and windows for your own user profiles and also for the default user profiles.

Each user profile can also be secured, making the set of widgets that are available standard across the profile. These defined user profiles can then be assigned to your users.

Viewing User Profiles

Use this procedure view the current set of User Profiles for your account.

To view a user profile:
2. In the General section of the Setup window, click User Profiles.
   The View Profiles window appears.
This window shows:

- the number of dashboards assigned to the profile
- the number of widgets or items assigned to the profile
- the number of Users assigned to the profile
- whether the profile is currently active (true or false)

Creating a User Profile

Use this procedure to set up a new user profile for your account.

To create a user profile:

2. In the General section of the Setup window, click User Profiles.
3. On the View Profiles window, click New.

   The Create Profile window appears.

4. Enter a Profile Name.
   Enter up to 100 alphanumeric characters.
   Spaces are allowed.
5. Click Add.

   The profile is created and the name appears on the Profile Management page.

   You can now complete the profile by adding dashboards, widgets, and sub-menu items. See Adding Dashboards, Widgets, and Sub-Menu Items To a Profile.
Adding Dashboards, Widgets, and Sub-Menu Items To a Profile

Use this procedure to assign dashboards, widgets, and sub-menu items to a new or existing profile.

To add dashboards, widgets, and sub-menus to a profile:

2. In the General section of the Setup window, click User Profiles.
3. On the View Profiles window, click the profile for which you would like to add Dashboards, Widgets and/or Sub Menu Items.
   The Manage User Profile page for the selected profile appears.

4. For each item on the list that you want to add, check the box on the right side of the line item.
5. When you are finished selecting items, click Update.

Ensuring PCI Compliance

To comply with PCI rules for credit card companies, your user profiles must comply with the following guidelines:

- Session timeout: set to 15 minutes or less
- Password Expiry: set to 90 days or less
- Consecutive failed attempts before user lockout: set to 6 or fewer
- Lockout period: set to 30 minutes or more

Outside Users

OMX includes an option to create and add outside users.
Creating an Outside User

Create an outside user in OMX when you need to link a user from another account into the current account. Outside users are indicated with the following icon: 🌍.

To create an outside user:

2. In the General section of the Setup window, click Users.
3. On the Existing Users window, click Add Outside User.
   The Link Outside Users window appears.

4. In the Outside Biz ID field, enter the Biz ID where the outside user was created.
5. In the Outside Administrator User field, enter the user name for outside administrator.
6. In the Outside Administrator Password field, enter the password for the outside administrator.
7. In the User Profile for Linked Users field, select a profile from the list.
8. If you want to prevent the outside user from personalizing their dashboard, check the Do Not Allow Dashboard Personalization box.
9. In the Outside Users text box, enter the outside users that you want to add to OMX.
   Each user must be on a separate line.
   The users must exist.
10. Click Unlock Now.
    OMX prompts you to enter your password (this is your normal OMX password).
11. Type your password, then click Unlock.
12. Click Continue.

Viewing Details About an Outside User

You can view the details of any outside user that has been added into your account. However, the information is for display only, and can be updated only within the original account where the user was created.

To view details about an outside user:

2. In the General section of the Setup window, click Users.
3. On the Existing Users window, click the hyperlink for the outside user that you want to view.

Outside users are indicated by the icon in the User column.

The User Information window appears.

The following information is included:

- **Description** – Displays the description of the outside user.
- **Home Account** – Displays the name of the originating account for the user.

User Security

This section describes the following OMX user security features:

- **Lockout Feature**
- **Session Timeout**
- **Resetting a Password**

Lockout Feature

For added security, OMX includes a user-level lockout feature. This feature creates a temporary block on accessing a user account after a defined number of consecutive failed login attempts for a user. Certain administrators can define the number of consecutive failed attempts that cause a lockout, as well as the lockout period. If the password is changed, the user is automatically unblocked.

If a user is locked out, an administrator in that account can unblock the user. For more information, see Adding a User and Updating a User.
Note: By default, six consecutive failed login attempts result in a 30-minute lockout.

Session Timeout

OMX requires all users to log in again following a period of inactivity. After logging in, the user can pick up where they left off.

You modify the session timeout on a per-user basis. The default value is 30 minutes. If this time is exceeded, the user is required to log back into OMX. Any partially completed transaction is lost.

Resetting a Password

OMX automatically prompts users to reset their password after a period of time (the default is 90 days). You need to have Administrator privileges to manually prompt a user to reset their password before it expires.

Tip: OMX remembers the last ten passwords used for each user. You cannot reuse a password until after the tenth reset.

To reset a password for a user:

2. In the General section of the Setup window, click Users.
3. On the Existing Users window, click the hyperlink for the user.
4. On the User Information window, click Reset Password.
   The Password Reset window appears.

5. Either enter a new password for the user, or check the Use Random Password box.
6. Choose a Revoke option.
7. Click Unlock Now.
   OMX prompts you to enter your password (this is your normal OMX password).
8. Type your password, then click Unlock.
9. Click Reset Password.
Keycodes Setup

This section explains how keycodes are used in OMX. It provides instruction on how to complete the required setup tasks.

Overview: What Is a Keycode?

A keycode is the principal tool used to measure the marketing return on your investment. Keycodes provide vital information that is preserved for the lifetime of your customers’ account. In OMX, each customer account is associated with its own unique keycode.

Keycodes provide the following information about each customer:

- the origin of the customer’s first order
- a list of all the promotions that have been sent to the customer
- the number of orders as well as the dollar sales generated from those promotions

Every order must have a keycode. Using keycodes, OMX can generate various reports to determine how the customer heard about your product and determine the origin of the sale.

You use keycodes to set order entry parameters such as shipping methods and costs, default items, item pricing, custom fields, payment and return policies, and so on.

Quick information about each keycode is shown in its SmartLabel.

Creating a Keycode

You can create as many keycodes as you need.

To Create a keycode:

1. On the Marketing tab, click Manage: Keycodes.
   The Edit Keycode window appears.

2. In the Keycode field, enter the name that you want to assign to the keycode. Enter up to 15 alphanumeric characters.
Creating a Keycode

Spaces and special characters are not allowed. OMX converts all characters to capital letters.

3. Click New.
4. Click OK to confirm.

The Basic Information page appears.

![Basic Information Form]

5. (optional) In the Description field, enter a brief description of the keycode. Enter a maximum of 50 characters.

6. In the Promotion field, enter the promotion to which the keycode is assigned. This can control the packing slip to be used when placing an order. For example, if you have two packing slips, this helps you decide which one to use. Enter a maximum of 15 characters.

7. In the Max. Line Item field, enter the maximum number of line items allowed in an order. You can place orders for up to 300 different items at a time.

```
Note: To ensure that text-based fulfillment files still display all order lines, update the Max. Line Items/Record setting of these files.
```

8. (optional) In the Fulfillment Indicator field, enter the value that enables you to split the text fulfillment files by keycode.

9. (optional) In the Call Type Group field, enter the call type group for the keycode. Specifying types of calls that are received in a call center helps to document telephone calls from customers in real-time.

To view the list of existing call types, from the Setup dashboard, under Customer Service, click Call Types.

Enter a maximum of 15 characters.

10. (optional) In the Mobile Code field, enter the code that is used for SMS (mobile phone) orders.

11. In the Launch Date field, enter the date when the keycode becomes active.
12. (optional) In the **Wait Date** field, enter the date when orders placed using this keycode automatically obtain a Waiting status until that date arrives.

13. (optional) In the **Expiry Date** field, enter the date when this keycode is no longer valid. As soon as it is deactivated, you can no longer place an order for that keycode.

14. Click **Update**.

### Searching for a Keycode

You can view all keycodes that have been created.

**To search for a keycode:**

1. On the **Marketing** tab, click Manage: **Keycodes**.
   The Edit Keycode window appears.

2. In the **Keycode** field, enter the name of the keycode that you want to find.
   The OMX search function displays a list of possible matches as you type.
   To display a list of all keycodes, enter an asterisk (*).
3. When the desired keycode has been entered or selected, click **Edit**.
   If you entered a valid keycode, then the Manage Keycode page appears.
   If you entered an asterisk, the Keycode Search window appears:

   ![Keycode Search Window]

   The following columns of information are included:
   - **Promotion** (hyperlink) – The name of the promotion that is associated with the keycode.
   - **Keycode** – The name of the keycode.
   - **Source** – The source for the keycode.
   - **Segment** – The segment of the promotion associated with the keycode.
   - **Description** – The description of the keycode.
   - **Quantity** – The quantity for the keycode.
   - **Launch Date** – The launch date for the keycode.

4. You can perform the following operations:
   - To manage the selected promotion, click a promotion hyperlink.
   - To manage the selected keycode, click a keycode hyperlink.
Creating New Keycodes By Copying an Existing Keycode

After you have created a keycode, you can copy and edit it for subsequent keycodes. Copying and editing an existing keycode saves time if you have multiple keycodes to enter. You can create multiple keycodes using this feature. All common information is copied over to the new keycodes. Only the variable information and back-end mailing information needs to be completed for the new keycodes.

To copy a keycode:

1. On the Marketing tab, click Manage: Keycodes.
2. On the Edit Keycode window, click Copy Keycodes.
   The Copy Keycode page appears.

3. In the Keycode field, enter the name of the keycode you wish to use as a template.
   You must enter the entire name of the keycode. Partial names are not valid.
4. In the Number of new Keycodes field, enter the number of new keycodes you want to create.
   You can create a maximum of 99 keycodes.
5. (optional) To use bulk data entry to paste your information instead of using the Variable Information window, check the Bulk Entry Information box.
   Typically, you can enter your information in a spreadsheet and then copy that information into the window.
   OMX expects a tab stroke for each possible entry even if you do not actually enter a value for that entry.
6. In the Variable Information section, check the boxes of the information that varies by keycode.

   **Note:** The Keycode box, which refers to the keycode name, must be checked.
7. Click Continue.
If you checked the Bulk Entry Information box, the Bulk Data Entry window appears, followed by an empty Data window.

If you did not check the Bulk Entry Information box, the Variable Information window appears.

This window includes only the fields that you checked in the Variable Information window.

8. Enter the new data.
9. Click Create.
   A confirmation message appears.
10. You can perform the following operations:
    ■ To add details for the new keycode, click the keycode hyperlink to display the Manage Keycode page.
    ■ To return to the Copy Keycode page, where you can copy more keycodes, click New.

Removing a Keycode from Usage

You cannot delete keycodes because there could potentially be orders associated to those keycodes. You can, however, make them inactive so that they cannot be used in current promotions. The inactive keycode, along with all associated orders and reporting data, is assigned to the new promotion.

To remove a keycode:
1. On the Marketing tab, click Manage: Keycodes.
2. In the Keycode field, enter the keycode that you are making inactive.
3. Click Edit.
4. In the Basic Information section, click Edit.
5. Do one of the following:
   ■ In the Expiry Date field, enter the date when the keycode expired.
   ■ In the Promotion field, change the promotion that is associated with the keycode.
   
   Note: You may first need to create an appropriate promotion if one does not exist.
6. Click Update.
Assigning Items To a Keycode

In your account, you can assign a parent item code and all its sub-items to a keycode. Or you may choose to assign a list of item codes to a keycode.

You can create multiple item-keycode pairs using the same page by entering multiple keycodes and items on separate lines.

To assign items to a keycode:

1. On the Marketing tab, click Manage: Keycodes.
2. On the Edit Keycode window, click Assign Items.
   The Assign Items dashboard appears, with the Keycode/Item Information window:

   ![Keycode/Item Information](image)

   3. In the Keycodes text box, enter the keycode.
   4. In the Item Codes text box, enter the parent item code.
   You can create multiple Item–Keycode pairs by entering multiple keycodes and items on separate lines.
   To assign multiple item codes to a single keycode, enter the keycode once in the box on the left, and then enter each item code on a separate line in the box on the right.

5. Click Continue.
   The keycode and items to be assigned are listed as shown in the following example:

   ![Keycode/Item Information](image)

6. If the information is correct, click Assign.
OMX links the item and all of its sub-items to the keycode.

To bulk-assign item codes to a keycode:

1. On the Marketing tab, click Manage: Keycodes.
2. On the Manage Keycode page, click Assign Items.
3. In the Keycode/Item Information window, under the Keycodes area, click the icon.
4. On the Available Keycodes window, enter the keycodes for bulk upload, separated by commas.
   You can enter up to 15,000 characters in this field.
   
   **Tip:** If you do not know the exact keycodes, use the search fields and click Apply Filter to display a larger list in the Results column.

5. Use the arrows to move the keycodes to which you want to add items into the Selected Entries column.
   To undo a selection, click [Remove].
6. Click Use Selected Keycodes.
7. On the Keycode/Item Information page, under the Item Codes window, click the icon.
8. On the Available Items window, click the Apply Filter button to display available items in the Results column.
9. Use the arrows to move the items that you want to add to the selected keycodes into the Selected Entries column.
   To undo a selection, click [Remove].
10. Click Continue.
11. Click Assign.

**Keycodes and Payment Plans**

In your account, you can create payment plans that offer your customers a convenient payment option instead of a lump sum payment.

**Associating Payment Plans with a Keycode**

Follow this procedure to choose one or more payment plans to offer with the selected keycode.
To associate one or more payment plans with a keycode:

1. On the Marketing tab, click Manage: Keycodes.
   The Edit Keycode window appears.
2. In the Keycode field, enter the keycode that you want to associate with one or more payment plans.
3. Click Edit.
   The Manage Keycode page appears.

   **Tip:** You can access this page by entering the following command line shortcut:
   `K keycode`

4. On the Payment Plans window, click Edit.
   The Payment Plans window appears.

<table>
<thead>
<tr>
<th>Available</th>
<th>Default</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>○</td>
<td>Every Thursday</td>
</tr>
<tr>
<td></td>
<td>○</td>
<td>Preordered Items</td>
</tr>
<tr>
<td>○</td>
<td>○</td>
<td>5 Installments of $19.99</td>
</tr>
<tr>
<td>○</td>
<td>○</td>
<td>SE/PST 6 Month Plan (C,C, E Check) Only</td>
</tr>
<tr>
<td>○</td>
<td>○</td>
<td>AS/PST 3 Month Plan (C,C, E Check) Only</td>
</tr>
<tr>
<td>○</td>
<td>○</td>
<td>SE 12 Month Plan (C,C, E Check) Only</td>
</tr>
<tr>
<td>○</td>
<td>○</td>
<td>SE Advanced Money Order Payment (10)</td>
</tr>
</tbody>
</table>

5. In the Available column, check the box for all payment plans that you want to be available for selection in this keycode.
6. In the Default column, check the option button of one of the available payment plans to set as the default.
   The default value is available for orders that have a payment method of either credit card or electronic check.
   If you select an option button but do not check the corresponding box in the Available column, the selection is ignored.
7. Click Update.

Viewing Payment Plans Associated with a Keycode

You can view the list of payment plans that are associated with a keycode.

To view the payment plans associated with a keycode:

1. On the Marketing tab, click Manage: Keycodes.
   The Edit Keycode window appears.
2. In the Keycode field, enter the keycode for which you want to view available payment plans.
3. Click Edit.
   The Manage Keycode page appears.
Tip: You can access this page by entering the following command line shortcut:

K keycode

All payment plans associated with the keyword are listed in the Payment Plans window. If you do not see this window, click Payment Plans in the left column of the page to open it.
Tax Codes

This chapter describes how to set up tax codes in your OMX system. The following sections are included:

- Introduction To Taxes and Tax Codes in OMX
- Tax Codes Setup
- Nexus Definitions
- Tax Exemptions
- Examples of Tax Calculations
- Tax Parameters: Sales Tax Included and Taxable Shipping
- Tax Details In an Order
- Override Tax Percentages with Imported Rates on a Per-Line Basis

Introduction To Taxes and Tax Codes in OMX

OMX enables you to account for different kinds of taxes that can be applied to orders using tax codes. This topic discusses sales tax, shipping and handling taxes, tax calculations in different situations, and viewing tax information within the system.

Sales Tax and Items

Sales tax is the amount of tax that is applied to the sale of items. You set sales tax at the item level, either through Item Management or through Item SmartUpload.
Sales tax for each item is determined by the tax code associated with that item. You associate a single tax code with each item in Item Management.

A tax code consists of:

- **Header information** - Indicates the unique identifier of the tax code, its description, and its Customer Exempt Exception flag (explained later in this list).

- **Nexus** - Based on the order’s shipping address, the nexus determines the country and state combination of the tax code, and the tax rate. The tax rate is user-defined, or, for the United States only, based on a tax service table.

**Note:** The user-defined tax rate values are different for Canada, the United States, and all other countries.

- **Exemptions** - Indicates the postal code, price, and date ranges that determine which items are exempt from having sales tax applied. The item must satisfy all parameters of the exemption to be eligible, unless you choose to apply partial exemptions (see Partial Exemptions). For the US, you can specify if each tax exemption is for federal, city, state, and/or county tax. For other locations, taxes are added as a bulk (combined) tax. You can view all tax exemptions using the Tax Exemption report.

**Note:** Exemptions only apply to the United States. OMX ignores exemptions created for other locations.

Tax is currently not recalculated under the following conditions:

- The ship to address changes before the order is shipped.
- The tax rate changes (in the tax code) after a temporary order is created.

Quick information about a tax code is included in its SmartLabel.

### Tax Included in the Price of an Item

Generally, sales tax is added on top of the price of an item, but you can choose to include it within the price of an item instead. For example, if the price of an item is $3.00 and sales tax is 5%, then the price of the item can be:

- $3.15 (where sales tax is in addition to the price of the item), or
- $3.00 (where the price of the item becomes $2.86 and the sales tax is $0.14).

The price of an item needs to include the tax in a situation where customers receive a discount equivalent to the tax (for example, in “pay no tax” events). Because companies still must pay the tax, this option enables you to have the price of an item automatically adjusted. For more information, see Tax Parameters: Sales Tax Included and Taxable Shipping.

Sales tax is still included in the price of an item even when the customer is exempt from paying tax. The Order Detail page shows the tax breakdown, and the Tax Details page displays the included tax as a non-jurisdiction tax. For more information, see Tax Details In an Order.
Sales Tax and Customers

If sales tax has been set up on an item, generally, customers need to pay that sales tax. However, you do have the option to exempt the customer from paying sales tax at the customer and order levels.

If tax exemption is configured at the customer level:

- the customer does not pay sales tax on their orders
- the exemption is noted in the customer’s SmartLabel

If the customer is configured to pay sales tax, no flag appears. When searching for a customer, the Business Customer flag also indicates that the customer is tax exempt.

If the customer is configured to pay sales tax, you also have the option of making the customer tax exempt on a per-order basis.

Even when a customer is tax exempt, a customer may still need to pay tax on an item. This can happen when:

- The Customer Exempt Exception box has been enabled in the tax code. Checking this box overrides the Tax Exempt configuration at the customer level, as well as any exemptions configured in the tax code.
- The customer is tax exempt (configured at the customer level), but the Tax Exempt box is unchecked on a per-order basis. This affects only individual orders. The customer is generally tax-exempt on subsequent orders.

In the cases above, the customer is charged the tax rate specified for the item based on the information in the associated tax code.

Note: When the sales tax is included within the price of an item, the sales tax is still shown in an order even for customers who are tax-exempt. Exempting a customer from tax means that no tax is added on top of the item price.

Shipping and Handling

By default, shipping and handling is not taxed.

If taxation on shipping and handling is required for a particular region, you can set this up in OMX using parameters. OMX then calculates the overall sales tax based on the total of all items in the order PLUS the total amount of shipping and handling on the order. For more information, see Tax Parameters: Sales Tax Included and Taxable Shipping.

If shipping and handling is being taxed at the order line level, then the tax rate used is the highest tax rate of any of the order lines. OMX recalculates order line tax rates and amounts if both of the following conditions apply:

- the line status is Open or Pending
- you update the order, for example, by changing the item quantity or changing the shipping and handling amount

Example: Canadian Tax

For Canadian tax, Goods and Services Tax/Harmonized Sales Tax (GST/HST) and Provincial Sales Tax (PST) is payable on shipping and handling. GST/HST is always charged on shipping and handling. PST is charged on shipping and handling if the order line items include a PST item. OMX uses the current shipping and handling tax calculations based on the highest tax rate of all items on the order.
Coupons and Marketing Policies

When an order contains one or more coupons, OMX calculates the sales tax based on the reduced price of an item. For example, if an item originally costs $10.00, and you apply a 10% off coupon, the sales tax is applied to the $9.00 value.

If you edit an order to add or remove coupons, the sales tax is re-calculated accordingly.

For marketing policy discounts, tax is applied to the discounted price. For marketing policy free items, only the purchased item is subject to tax.

**Important:** To ensure that they are set up correctly, do not attach a tax code to your coupons.

**Note:** Currently, Canadian tax does not support coupons and marketing policies.

Configuring Taxes

A basic guideline for setting up your taxes is as follows.

**To set up your taxes:**

1. Create your tax codes.
   a. Enter header information.
   b. Enter nexus definitions.
   c. Enter exemptions.
2. Associate a tax code with each item.
   - If you are planning to use one tax code for the majority of the items, you can either:
     - use the TEMPLATE item as your base for creating individual items, or
     - use Item SmartUpload when creating multiple items at the same time
3. Determine which customers should be tax exempt.
4. Determine if item prices should include tax (based on shipping location).
5. Determine if shipping and handling should be taxable (based on shipping location).

Viewing Tax Information in OMX

There are two ways to view tax information in OMX:

- **In individual orders** – The Order Detail window displays applicable taxes after the net order amount, organized by each level of taxation. Click the [...] hyperlinks to view taxes in greater detail at the order level.
**Note:** Applicable taxes are not broken down in other locations, such as shipping documents, order documentation, and reports.

- **Using the Tax Exemption report** – You can view tax exemptions for tax service only in your account using the Tax Exemption report. In other reports, only one single tax rate appears. To access this report, on the Reporting tab, click View: Financial Reports > Reports > Tax Exemption Report.

---

**Tax Codes Setup**

This section explains how to set up tax codes.

**Viewing the List of Tax Codes**

You can view all of the tax codes that have been entered into OMX and manage them as required.

**To view the list of tax codes:**

2. In the General section of the Setup window, click Tax Codes.
   
   The Existing Tax Codes window appears.

<table>
<thead>
<tr>
<th>Tax Code</th>
<th>Description</th>
<th>Exemptions</th>
</tr>
</thead>
<tbody>
<tr>
<td>ANCA</td>
<td>MA Luxury Tax</td>
<td>⬤</td>
</tr>
<tr>
<td>DEFAULT</td>
<td>US, NY and CA, Québec</td>
<td>⬤</td>
</tr>
<tr>
<td>TC34</td>
<td>Migrated</td>
<td>⬤</td>
</tr>
<tr>
<td>TC35</td>
<td>Migrated</td>
<td>⬤</td>
</tr>
<tr>
<td>TC36</td>
<td>Migrated</td>
<td>⬤</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

This window lists the tax codes that have been added into the system. The following columns are included:

- **Tax Code** (hyperlink) – The tax code.
- **Description** – Description of the tax code.
- **Exemptions** – Indicates whether there are exemptions (green check) or not (red X) for each tax code.

**Tip:** To change the sort order of the tax codes, click the Tax Code column header.

3. You can perform the following operations:

   - To edit the selected tax code, click a tax code hyperlink. See Editing a Tax Code.
   - To add a tax code, click New. See Adding a Tax Code.
   - To create an Excel spreadsheet of the tax codes, click Export to Excel.
To create a Comma–Separated File of the tax codes, click Export to CSV.

Adding a Tax Code

Adding a tax code is the first step in specifying tax information that can be associated with items and applied to an order. You need to provide a unique identifier, enter a description of the tax code, and indicate if customers must pay tax on items even when the customer has been designated as tax exempt.

After adding a tax code, you need to add nexus definitions. You can also add exemptions if required.

To add a tax code:

2. In the General section of the Setup window, click Tax Codes.
3. On the Existing Tax Codes window, click New.

   4. In the Tax Code field, enter the value that you want to assign to this tax code.
      Specify a maximum of 15 alpha-numeric characters. Spaces are not allowed.
      This value must be unique.

   5. In the Description field, enter a description of the tax code.
      The description should help to identify the tax code when associating a tax code with an item.
      Enter a maximum of 100 characters. Spaces are allowed.

   6. (optional) If customers flagged as tax exempt must pay sales tax on items associated with this tax code, check the Customer Exemption Exception box.

   7. Click Add.
      OMX displays a message indicating whether the tax code was added successfully.

Managing a Tax Code

This topic indicates the different ways that you can manage a tax code.

To manage a tax code:

2. In the General section of the Setup window, click Tax Codes.
3. On the Existing Tax Codes window, click the hyperlink of the tax code that you want to manage.
   The Manage Tax Code page appears.
This page enables you to edit the header information for the tax code, manage nexus definitions, and manage exemptions.

**Editing a Tax Code**

When required, you can edit a tax code.

**To edit a tax code:**

1. On the **Setup** tab, click **Configure: Your Account**.
2. In the General section of the Setup window, click **Tax Codes**.
3. On the Existing Tax Codes window, click the hyperlink of the tax code that you want to edit.

5. In the **Tax Code** field, update the value to assign to this tax code. Enter a maximum of 15 alpha-numeric characters (no spaces).
6. In the **Description** field, update the description of the tax code. Enter a maximum of 100 characters. Spaces are allowed.
This can help you to identify the tax code when associating a tax code with an item.

7. (optional) Check or clear the **Customer Exemption Exception** box.
   This box indicates whether tax-exempt customers must pay sales tax on items associated with this tax code.

8. Click **Update**.
   OMX displays a message indicating whether the tax code was updated successfully.

### Nexus Definitions

Merchants who use OMX to sell products need to collect sales tax in regions where they have sales tax nexus. Nexus is a legal term meaning that your business has a significant enough connection to a region that you must collect sales tax from buyers in that region.

### Viewing Nexus Definitions for a Tax Code

Use the Nexus Definitions page as your starting point for creating and managing the nexus definitions.

**To view nexus definitions for a tax code:**

1. On the **Setup** tab, click Configure: **Your Account**.
2. In the General section of the Setup window, click **Tax Codes**.
3. On the Existing Tax Codes window, click the hyperlink of the tax code that you want to view.
4. On the Manage Tax Code dashboard, scroll to the Nexus Definitions window.

This window displays all nexus definitions that have been created for this tax code. It includes the following columns:

- **Country/State** (hyperlink) – the country and state combination of the nexus definition.
- **Rate** – the tax rate (to five decimals) for the nexus definition.
- **Use Tax Service** – indicates whether the nexus definition uses the tax service (green check) or not (red X).

5. You can perform the following operations:
   - To add a nexus definition, click **New**.
   - To edit an existing nexus definition, click a **Country/State** hyperlink. See Adding and Editing a Nexus Definition – Canada, Adding a Nexus Definition – United States, or Adding and Editing a Nexus Definition – Other Countries.
   - To remove a nexus definition from the tax code, click **Remove**.

**Note:** The information required for each definition depends on if you are creating one for Canada, the United States, or for all other countries.
Adding and Editing a Nexus Definition – Canada

This topic explains how to create a nexus for Canada.

**Note:** You need to check the tax laws to verify how items should be taxed in specific locations.

Each nexus definition must be unique within its tax code.

**Note:** The information required for other countries (USA and all others) is different from that required for Canada.

**To add a Canadian nexus definition:**

1. On the Setup tab, click Configure: *Your Account*.
2. In the General section of the Setup window, click *Tax Codes*.
3. In the Existing Tax Codes window, click the hyperlink of the tax code that you want to edit.
4. On the Manage Tax Code dashboard, scroll to the Nexus Definitions window.
5. Click *New*.
   The New Tax Code Nexus window appears, with fields shown for the default country (USA).
6. In the New Tax Code Nexus window, select Canada from the *Country* list.
   The list of countries is taken from the selections in the Customer Base feature.
   The relevant fields for a Canadian tax definition appear.

   ![New Tax Code Nexus Window](image)

7. In the **State** field, enter the two-letter abbreviation for the province or territory required for the nexus definition. The following is a list of valid values:

<table>
<thead>
<tr>
<th>Name</th>
<th>Abbreviation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alberta</td>
<td>AB</td>
</tr>
<tr>
<td>British Columbia</td>
<td>BC</td>
</tr>
<tr>
<td>Manitoba</td>
<td>MB</td>
</tr>
<tr>
<td>New Brunswick</td>
<td>NB</td>
</tr>
<tr>
<td>Newfoundland and Labrador</td>
<td>NL</td>
</tr>
<tr>
<td>Northwest Territories</td>
<td>NT</td>
</tr>
<tr>
<td>Nova Scotia</td>
<td>NS</td>
</tr>
<tr>
<td>Nunavut</td>
<td>NU</td>
</tr>
<tr>
<td>Ontario</td>
<td>ON</td>
</tr>
</tbody>
</table>
### Nexus Definitions

<table>
<thead>
<tr>
<th>Name</th>
<th>Abbreviation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prince Edward Island</td>
<td>PE</td>
</tr>
<tr>
<td>Quebec</td>
<td>QC</td>
</tr>
<tr>
<td>Saskatchewan</td>
<td>SK</td>
</tr>
<tr>
<td>Yukon</td>
<td>YT</td>
</tr>
<tr>
<td>all provinces and territories</td>
<td>*</td>
</tr>
</tbody>
</table>

8. (optional) In the Rates section, enter the percentage of Goods and Services Tax/Harmonized Sales Tax (GST/HST), Provincial Sales Tax/Quebec Sales Tax (PST/QST), or both to be applied.

9. (optional) Check the Combined box if you want to apply PST on the total value including GST. For example, an item amount is $5.00, GST percentage is 5% and PST is 6%. If not combined, the total order amount is $5.00 (item amount) + 0.25 (GST) + 0.30 (PST) = $5.55. If combined, then the total order amount is $5.00 (item amount) + 0.25 (GST) + ($5.25 * .06) = 5.25 + 0.32 = $5.57.

10. Click Add.
OMX displays a message indicating whether the nexus definition was added successfully.

### Adding a Nexus Definition – United States

This topic explains how to create a nexus for the United States. You need to specify the country and state combination. You also need to indicate how the sales tax is calculated, either by percentage or by using the tax service. The tax service uses a predefined tax rate.

Each nexus definition must be unique within its tax code.

**Note:** The information required for Canada and all other countries is different from that required for the United States.

**To add a nexus definition for the United States:**

2. In the General section of the Setup window, click Tax Codes.
3. In the Existing Tax Codes window, click the hyperlink of the tax code that you want to edit.
4. On the Manage Tax Code dashboard, scroll to the Nexus Definitions window.
5. Click New.
The New Tax Code Nexus window appears, with fields shown for the default country (USA).

6. In the State field, enter the two–letter abbreviation for the state required for the nexus definition.
You can find the state codes using the World Fact Book, accessed via the International Tools widget on the Customer Service dashboard.
You can specify all states by entering an asterisk (*).
7. In the Rates section, enter the percentage of sales tax at each jurisdiction applied to items associated with the tax code.
   These values are required only if you do not check the Use Tax Service box.
   If you decide to use the tax service, its rate appears in this field.
8. (optional) Check the Use Tax Service box to use the tax service to determine the tax percentage instead of specifying a tax rate.
9. (optional) Check the Use ZIP+4 for Tax Rate box to use the postal code and city name for more accurate tax rate matching.
10. Click Add.
    OMX displays a message indicating whether the nexus definition was added successfully.

Adding and Editing a Nexus Definition – Other Countries

For countries other than Canada and the United States, you define the nexus by:
- specifying the country and state combination
- indicating the percentage of taxation for that combination

Each nexus definition must be unique within its tax code.

Note: The information required for Canada and the United States is different from that required for all other countries.

To add a nexus definition for a country other than Canada or the United States:
2. In the General section of the Setup window, click Tax Codes.
3. In the Existing Tax Codes window, click the hyperlink of the tax code that you want to edit.
4. On the Manage Tax Code dashboard, scroll to the Nexus Definitions window.
5. Click New.
   The New Tax Code Nexus window appears, with fields shown for the default country (USA).
6. From the Country list, select the country for the nexus definition.
   The list of countries is taken from the selections in the Customer Base feature.
   The State field is auto-filled to all (*) and cannot be changed.
7. In the Rate section, enter the percentage of sales tax applied to items associated with the tax code.
8. Click Add.
OMX displays a message indicating whether the nexus definition was added successfully.

Editing a Nexus Definition

You can edit any existing nexus definition.

To edit a nexus definition:

2. In the General section of the Setup window, click Tax Codes.
3. In the Existing Tax Codes window, click the hyperlink of the tax code that you want to edit.
4. On the Manage Tax Code dashboard, scroll to the Nexus Definitions window.
5. Click the hyperlink for the nexus definition you want to edit.
The Edit Tax Code Nexus window appears.

6. Make any desired changes, then click Update.
OMX displays a message indicating whether the nexus definition was updated successfully.

Removing a Nexus Definition

You can remove a nexus definition when it is no longer needed in the tax code.

To remove a nexus definition:

2. In the General section of the Setup window, click Tax Codes.
3. In the Existing Tax Codes window, click the hyperlink of the tax code that you want to edit.
4. On the Manage Tax Code dashboard, scroll to the Nexus Definitions window.
5. Click the [Remove] hyperlink of the nexus that you want to remove.
A message appears indicating whether the nexus definition was removed successfully.

Tax Exemptions

Some regions are exempt from having sales tax applied. An item must satisfy all parameters of the exemption to be eligible, unless you choose to apply partial exemptions (see Partial Exemptions). For
the United States, you can specify if each tax exemption is for federal, city, state, or county tax. For other locations, taxes are added as a bulk (combined) tax. You can view all tax exemptions using the Tax Exemption report.

Viewing the List of Tax Code Exemptions

This topic describes the access point for managing the exemptions for a selected tax code.

To view the list of tax code exemptions:

2. In the General section of the Setup window, click Tax Codes.
3. On the Existing Tax Codes window, click the hyperlink of the tax code that you want to view.
4. On the Manage Tax Code page, scroll to the Exemptions window, as shown below:

<table>
<thead>
<tr>
<th>Exemption Code (hyperlink)</th>
<th>ZIP Range</th>
<th>Price Range</th>
<th>Date Range</th>
<th>Exemptions</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>11111 - 11113</td>
<td>0.00 - 10,000.00</td>
<td>6/6/2017 - 12/12/2017</td>
<td>Federal</td>
</tr>
</tbody>
</table>

This window displays the exemptions that have been added to the tax code. The following columns are included:

- **Exemption Code** (hyperlink) – The unique identifier of the exemption.
- **ZIP Range** – The postal code range where the exemption is valid.
- **Price Range** – The price range within which the exemption is applied.
- **Date Range** – The dates when the exemption is valid.
- **Exemptions** – The regions where the exemption applies. For example: federal, state, provincial, county, municipal.

5. You can perform the following operations:
   - To add an exemption to the tax code, click **New**.
   - To edit the selected exemption, click an exemption code hyperlink.

Partial Exemptions

Partial exemptions enable you to specify that any amount that exceeds the exemption threshold is subject to sales tax. For example, a gold bracelet is $300. The exemption range is from $0 to $175, meaning that anything within that price range is exempt from tax. Therefore, the gold bracelet is charged tax on $125 ($300 cost - $175 exemption = $125 taxable).

You specify partial exemptions when adding or editing a tax code exemption.

**Note:** Do not combine marketing policies with partial tax exemptions.

Jurisdiction-Level Exemptions

To apply tax exemptions to jurisdiction-level overrides, set the OverwrittenTaxesRespectExemptions company parameter to True.
Adding a Tax Code Exemption

A tax code exemption enables you to indicate when tax is not applied to an order. You can exempt tax on zip range, date, and price ranges. You can also indicate:

- The jurisdictions where the tax is exempt. To apply tax exemptions to jurisdiction-level overrides, set the OverwrittenTaxesRespectExemptions company parameter to True.
- If an item is subject to Partial Exemptions

**Note:** The date range in a tax exemption cannot overlap with another date range within the same tax code.

To add a tax code exemption:

2. In the General section of the Setup window, click Tax Codes.
3. On the Existing Tax Codes window, click the hyperlink of the tax code that you want to edit.
   The New Tax Code Exemption window appears:

5. In the Exemption Code field, enter a code for exemption.
   Enter a maximum of 15 alpha-numeric characters (no spaces).
   This value must be unique within the tax code.
6. (optional) Check the Partial Exemption box to allow tax exemptions up to the amount specified in the Price Range fields (below).
   The minimum Price Range value must be 0 when this box is checked.
   Any amount exceeding the Price Range value is subject to sales tax.
   If unchecked, the item is subject to full exemption rules.
7. In the ZIP Range fields, enter the first and last zip codes that define the exemption area.
   The exemption is valid when the billing address is within the specified zip code range.
   Valid ZIP codes are 00000 to 99999 or 00000–0000 to 99999–9999.
   You can enter the same ZIP code for both fields.
8. In the Price Range fields, enter the currency amount range of the exemption.
   This represents the price of a single item.
The minimum price range value must always be 0 when the Partial Exemption box is checked.

9. In the Date Range fields, select the start and end date for applying this exemption.

Any order placed outside of these dates is not eligible for the tax exemption.

10. In the Exemptions section, check the tax jurisdictions to which this tax exemption applies.

You must select at least one jurisdiction.

When viewing order details, OMX calculates taxes based on the non-tax exempt jurisdictions. For example, an item is subject to 8% sales tax, and federal and state are exempt. OMX divides the 8% between the remaining two jurisdictions (4% county and 4% city).

11. To save your information, click Add.

OMX displays a message indicating whether the exemption was added successfully to the tax code.

Editing a Tax Code Exemption

You can edit a tax code exemption by changing its code, zip, date, and price ranges, as well as the jurisdictions where tax is exempt. You can also indicate if an item is subject to partial exemptions, meaning that the item is exempt up to a certain amount. Anything over that threshold value is subject to tax.

To edit a tax code exemption:

2. In the General section of the Setup window, click Tax Codes.
3. On the Existing Tax Codes window, click the hyperlink of the tax code that you want to edit.
4. On the Manage Tax Code dashboard, in the Exemptions window, click the hyperlink of the exemption that you want to edit.

The Edit Tax Code Exemption window appears:

5. In the Exemption Code field, enter a code for exemption.

Enter a maximum of 15 alpha-numeric characters (no spaces).

This value must be unique within the tax code.

6. (optional) Check the Partial Exemption box to allow tax exemptions up to the amount specified in the Price Range fields (below).

Any amount exceeding the Price Range value is subject to sales tax.
If unchecked, the item is subject to full exemption rules.

7. In the **ZIP Range** fields, update the first and last zip codes that define the exemption area. The exemption is valid when the billing address is within the specified zip code range. Valid ZIP codes are 00000 to 99999 or 00000–0000 to 99999–9999. You can enter the same ZIP code for both fields.

8. In the **Price Range** fields, update the currency amount range of the exemption. This represents the price of a single item. The minimum price range value must always be 0 when the Partial Exemption box is checked.

9. In the **Date Range** fields, update the start and end date for applying this exemption. Any order placed outside of these dates is not eligible for the tax exemption. Enter the date in numeric month/day/year format. For example, for July 6 2017, enter 7/6/2017.

10. In the **Exemptions** section, check the tax jurisdictions to which this tax exemption applies. You must select at least one jurisdiction. When viewing order details, OMX calculates taxes based on the non-tax exempt jurisdictions. For example, an item is subject to 8% sales tax, and federal and state are exempt. OMX divides the 8% between the remaining two jurisdictions (4% county and 4% city).

11. To save your information, click **Update**. OMX displays a message indicating whether the exemption was added successfully to the tax code.

### Examples of Tax Calculations

Using examples, this topic indicates how tax is calculated in different situations.

#### Example 1. Simple Order

In this example:
- Sales tax is applied to the item.
- Shipping and handling is added to the total amount of the order.
- Shipping and handling is not taxed.

<table>
<thead>
<tr>
<th>Order Detail</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td># Item</td>
<td>Qty</td>
</tr>
</tbody>
</table>
| 1  
  Kiwi        | 1.00 | 1.00  | 1.00  | in progress |

**Merchandise Total**  
- Sales Tax - CA, ON [...]: 0.14
- Shipping & Handling - UPS Ground Residential [...]: 8.00

**Total Order**  
- USD 9.14  
- CAD Canadian Dollar 12.13

The result is:
- Total price of the item = $1.00  
- Sales tax on item price only ($1.00) at 14% = .14  
- Additional shipping and handling charge = $8.00  
- Total order amount = $9.14
Example 2. Sales Tax with Shipping and Handling Tax

In this example:

- Sales tax is applied to the item.
- Shipping and handling is added to the total amount of the order.
- Shipping and handling is taxed.

<table>
<thead>
<tr>
<th>#</th>
<th>Item</th>
<th>Qty</th>
<th>Price</th>
<th>Total</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>KIWI</td>
<td>1</td>
<td>1.00</td>
<td>1.00</td>
<td>In progress 3/30/2000</td>
</tr>
</tbody>
</table>

**Merchandise Total** 1.00

+ Shipping & Handling - UPS Ground Residential [...] 8.00

**Net Order Amount** 9.00

+ Sales Tax - CA, ON [...] 1.26

**Total Order** USD 10.26

The result is:

- Total price of item = $1.00
- Additional shipping and handling charge = $8.00
- Sales tax on $9.00 (item price + shipping and handling) at 14% = 1.26
- Total order amount = $10.26

Example 3. Sales Tax is Included in the Price of the Item

In this example:

- Sales tax is contained within the price of the item.
- Shipping and handling is added to the total amount of the order.
- Shipping and handling is not taxed.

<table>
<thead>
<tr>
<th>#</th>
<th>Item</th>
<th>Qty</th>
<th>Price</th>
<th>Total</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>KIWI</td>
<td>1</td>
<td>1.00</td>
<td>1.00</td>
<td>In progress 3/30/2000</td>
</tr>
</tbody>
</table>

**Merchandise Total** 1.00

+ Shipping & Handling - UPS Ground Residential [...] 8.00

**Total Order** USD 9.00

The result is:

- Total price of the item ($0.88 item price + .12 of sales tax at 14%) = $1.00
- Additional shipping and handling charge = $8.00
- Total order amount = $9.00
Example 4. Customer Exempt

In this example:

- Sales tax is not applied to the item.
- Shipping and handling is added to the total amount of the order.
- Shipping and handling is not taxed.

<table>
<thead>
<tr>
<th>#</th>
<th>Item</th>
<th>Qty</th>
<th>Price</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>KIWI</td>
<td>1</td>
<td>1.00</td>
<td>1.00</td>
</tr>
<tr>
<td></td>
<td>Merchandise</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Total Order</td>
<td></td>
<td></td>
<td>USD 9.00</td>
</tr>
</tbody>
</table>

The result is:

- Total price of the item = $1.00
- No sales tax
- Additional shipping and handling charge = $8.00
- Total order amount = $9.00
Example 5. Marketing Policy with a Discount

In this example:

- Sales tax is applied to the item.
- Shipping and handling is added to the total amount of the order.
- Shipping and handling is not taxed.
- The marketing policy gives a 10% discount when the item is ordered.

<table>
<thead>
<tr>
<th>Order Detail</th>
</tr>
</thead>
<tbody>
<tr>
<td>#</td>
</tr>
<tr>
<td>1</td>
</tr>
</tbody>
</table>

- Merchandise Total: 0.90
- + Sales Tax: CA, ON [...] 0.13
- + Shipping & Handling: UPS Ground Residential [...] 0.00

= Total Order: USD 9.03

Note: If the item is returned, the customer has a credit of the discounted price of the kiwi and the sales tax ($1.03). The shipping and handling must be returned in a manual adjustment.
Example 6. Marketing Policy with a Free Item

In this example:

- Sales tax is applied to the item.
- Shipping and handling is added to the total amount of the order.
- Shipping and handling is not taxed.
- The marketing policy gives a free item as a new line item.

The result is:

- Total price of the item = $1.00.
- The free item has a price of $0.00.
- Sales tax of 14% applied to the purchased item = $0.14.
- Additional shipping and handling charge = $8.00
- Total order amount = $9.14 ($1.00 + 8.00 + 0.14)
Example 7. Coupon

In this example:

- An item is added to the order.
- The coupon decreases the price of the item by 10%.
- Sales tax is applied to the discounted price of the item.
- Shipping and handling is added to the total amount of the order.
- Shipping and handling is not taxed.

<table>
<thead>
<tr>
<th>#</th>
<th>Item</th>
<th>Qty</th>
<th>Price</th>
<th>Total</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>COUPON (10%)</td>
<td>1</td>
<td>-0.10</td>
<td>-0.10</td>
<td>in progress</td>
</tr>
<tr>
<td>2</td>
<td>RENEW</td>
<td>1</td>
<td>1.00</td>
<td>1.00</td>
<td>in progress</td>
</tr>
<tr>
<td></td>
<td><strong>Merchandise Total</strong></td>
<td></td>
<td></td>
<td><strong>0.90</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>+ Sales Tax · CA, ON [...]</td>
<td></td>
<td></td>
<td><strong>0.13</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>+ Shipping &amp; Handling · UPS Ground Residential [...]</td>
<td></td>
<td></td>
<td><strong>8.00</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>= <strong>Total Order</strong></td>
<td></td>
<td></td>
<td><strong>USD 9.03</strong></td>
<td>CAD Canadian Dollar 12.19</td>
</tr>
</tbody>
</table>

The result is:

- Because of the coupon, the total price of the item = $0.90.
- Sales tax of 14% applied to the item = $0.13.
- Additional shipping and handling charge = $8.00
- Total order amount = $9.03 ($8.00 + 0.13)

Tax Parameters: Sales Tax Included and Taxable Shipping

For each shipping location, you can use tax parameters to specify:

- whether shipping and handling charges should be taxed in orders
- whether the price of an item should include sales tax

The locations that are available are based on your selections in the Shipping Base. To access the Shipping Base, on the Setup dashboard, under Fulfillment and Shipping, select Shipping Base.

To set up your tax parameters:

2. In the Accounting section of the Setup window, click Tax Nexus.
   The Tax Parameter window appears.
3. In the **S&H taxable** column, check the boxes of those locations where shipping and handling charges are taxed.

**Note:** For the locations that have this box checked, the Order Detail window of an order appears differently. For orders where shipping and handling charges are taxable, the shipping and handling fee is shown above the tax line, instead of below. This indicates that the sales tax was calculated using the price of the items in the order and the shipping and handling charges.

**Note:** Tax is charged only when shipping and handling costs are greater than 0.

4. In the **Sales incl. tax** column, check the boxes for locations where sales tax is included in the item price.

5. To save your changes, click **Update**.

### Tax Details In an Order

If sales tax has been applied to an order, you can view those tax details for each order line and for the entire order. These details include:

- tax percentages
- exemptions
- partial exemptions
- tax amounts

**Note:** The displayed tax information depends on the country specified in your nexus definition. The following example shows tax details for the United States.

**To view tax details in an order:**

1. On the Order Detail page, click the Sales Tax [...] hyperlink.
The Tax Detail window appears:

This window displays all taxes applied to each item in the order. The following columns and rows of information are included:

- **#** – The line number in the order.
- **Item** (hyperlink) – The item code and its description.
- **Quantity** – The quantity of the item that was ordered.
- **Price** – The price of the item.
- **Total** – The total price of the items ordered (quantity x price).
- **Tax Code** (hyperlink) – Typically, displays the tax code that has been associated with the item. Note that when applicable, this column displays the code for Partial Exemptions.
- **Tax Rate** – Indicates the tax rate percentage applied to the item, broken down by jurisdiction. Note that for partial exemptions, this value displays the effective tax rate.

For example, the item price amount is $150, the partial exemption is up to $100, and the tax rate is 10%. The applicable tax for the line item is $5, and the tax rate appears as 3.333% ($5/$150).

- **Tax** – The amount of tax applied to the order line. A blank value indicates a tax exemption.
- **Total Line Tax** – The total percentage and amount of tax that has been applied to each order line.
- **Total Shipping & Handling Tax** – The shipping and handling tax rate for the order.
- **Total Order Tax** – The total of all taxes in the order.

2. You can perform the following operations:

- To view quick item information, click an item hyperlink.
- To view and manage the tax code, click a tax code hyperlink.
Override Tax Percentages with Imported Rates on a Per-Line Basis

The OMX Tax service is based on Avalara flat tables. In some cases, clients may prefer to use a different tax rate provider on their e-commerce solution and apply the tax rate provided by the third party to their orders. OMX lets you use an external tax source and force the third party tax rate to OMX through UDOA. OMX applies the tax rate included in the UDOA (or edited through ODUR) on the order. This feature is particularly useful for clients who use a third party tax system for their web orders and for orders from other sources such as marketplaces.

There are two elements available for use within the <LineItem>...</LineItem> section of the UDOA (create order) and ODUR (change order) APIs. You can use these elements to force a third party tax code and overwrite the OMX tax rate:

- **OverwriteTaxRate** – Use to override the overall tax rate.
- **OverwriteJurisdictionTaxRates** – Use to override individual jurisdictions with different rates. This element includes the following parts:
  - **JurisdictionLevel** – Use to specify a jurisdiction level to which the tax rate applies.
  - **TaxPercent** – Use to apply the tax percentage.

This is how these new elements work with UDOA and ODUR:

- Use UDOA for creating a new order. UDOA enables you to:
  - Create an override on the new order by sending either of the elements
  - Use the internal rate by sending no elements
- Use ODUR for updating an existing order. ODUR enables you to:
  - Set up or update the override by sending either of the elements. OMX creates the following memo:
    - Tax properties have been edited.
  - Remove all overrides by sending either of the elements with empty content
  - Leave the order unchanged by sending no elements
  - Override OMX tax rates as well as imported tax rates

When setting up tax rate overrides:

- Use the <OverwriteJurisdictionTaxRates> element to define the jurisdiction level and tax percentage. For example:

  ```xml
  <OverwriteJurisdictionTaxRates>
  <Jurisdiction level="1" >
  <TaxPercent>5</TaxPercent>
  </OverwriteJurisdictionTaxRates>
  ```

- To make the item tax-free, set OverwriteTaxRate to 0.
- To use the internal OMX tax rate, use `<OverwriteTaxRate>` (empty value), or do not include the optional OverwriteJurisdictionTaxRates element in your API request.
- You can specify up to six decimal places for the tax rate.
- Imported tax rates are identified in the OMX interface by the green override icon.
- If no specific jurisdiction levels are provided (for example, for a country other than the United States or Canada), use the general tax rate (<OverwriteTaxRate>...</OverwriteTaxRate>).
Override Tax Percentages with Imported Rates on a Per-Line Basis

The following table lists all JurisdictionLevelID values for OMX.

<table>
<thead>
<tr>
<th>TLD</th>
<th>JurisdictionLevelID</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CA</td>
<td>1</td>
<td>GST/HST</td>
</tr>
<tr>
<td>CA</td>
<td>2</td>
<td>PST/QST</td>
</tr>
<tr>
<td>US</td>
<td>1</td>
<td>Federal</td>
</tr>
<tr>
<td>US</td>
<td>2</td>
<td>State</td>
</tr>
<tr>
<td>US</td>
<td>3</td>
<td>County</td>
</tr>
<tr>
<td>US</td>
<td>4</td>
<td>City (Municipal)</td>
</tr>
</tbody>
</table>

**Example 8. UDOA Tax Override Setup**

This example shows the use of the OverwriteJurisdictionTaxRates element in the UDOA code to force a tax percentage of 5% on Jurisdiction level 1 and 3% on jurisdiction level 2. The resulting Order Detail and Tax Detail pages are also shown, with the green override icon identifying the external and forced tax rates.

```xml
<LineItem>
  <ItemCode>TEST</ItemCode>
  <Quantity>10</Quantity>
  <OverwriteJurisdictionTaxRates>
    <Jurisdiction level="1">
      <TaxPercent>5</TaxPercent>
    </Jurisdiction>
    <Jurisdiction level="2">
      <TaxPercent>3</TaxPercent>
    </Jurisdiction>
  </OverwriteJurisdictionTaxRates>
</LineItem>
```

**Order Detail**

<table>
<thead>
<tr>
<th>#</th>
<th>Item</th>
<th>Qty</th>
<th>Price</th>
<th>Total</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>TEST Default Test Item</td>
<td>10</td>
<td>10.00</td>
<td>100.00</td>
<td>pending 12/18/2018</td>
</tr>
</tbody>
</table>

**Tax Detail**

<table>
<thead>
<tr>
<th>#</th>
<th>Item</th>
<th>Quantity</th>
<th>Price</th>
<th>Total</th>
<th>Tax Code</th>
<th>Tax Rate</th>
<th>Tax</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>TEST Default Test Item</td>
<td>10</td>
<td>10.00</td>
<td>100.00</td>
<td></td>
<td></td>
<td>8.00</td>
</tr>
</tbody>
</table>

The tax rate was set by an external system.
Example 9. ODUR Tax Override Setup

This example shows the use of the `<OverwriteJurisdictionTaxRates>` element in the UDOA code to force a tax percentage of 2% on Jurisdiction level 1 and 3.75% on jurisdiction level 2. The resulting Order Detail and Tax Detail pages are also shown, with the green override icon identifying the external and forced tax rates.

```xml
<LineItem lineNumber="1">
  <Quantity>10</Quantity>
  <OverwriteJurisdictionTaxRates>
    <Jurisdiction level="1">
      <TaxPercent>2</TaxPercent>
    </Jurisdiction>
    <Jurisdiction level="2">
      <TaxPercent>3.75</TaxPercent>
    </Jurisdiction>
  </OverwriteJurisdictionTaxRates>
</LineItem>
```

Apply OMX Tax Rate If Shipping Address Has Changed On an Order with an Imported Tax Rate

OMX applies its own tax rate to any order with an imported tax rate if the Shipping Address for the order is changed.

When shipping details on an order change at a later date, there is a high probability that the original imported tax rate should also be updated. OMX recalculates the order, including the tax rate, in both of the following cases:

- The imported tax rate is not provided along with the ShipTo change in ODUR.
- The shipping details are updated in the OMX user interface.
This measure should prevent mismatches between the imported tax based on original destination and sales tax associated with the updated shipping address.

Changing the ShipTo address on an order with an imported tax rate generates a memo. For example:

![Example Memo](image)

### Import and Modify Tax Rates According To Jurisdiction

OMX enables you to import and modify tax rates broken down by jurisdiction.

In the US and Canada, sales tax is usually a combination of taxes at different levels. Canadian sales tax consists of either separate federal (GST) and provincial (PST/QST) tax rates or a combined tax (HST). US sales tax may combine federal, state, county and city taxes.

There also may be other taxes applied within the US, but OMX does not support these other taxes.

If you need to submit other types of tax rates (different than the defined jurisdiction levels), you can use one of the existing jurisdiction levels. You can also apply a general line-level tax rate using the OverwriteTaxRate element.

In addition to the elements described in Override Tax Percentages with Imported Rates on a Per-Line Basis, the following elements have been added:

- **SIR100, SIR200, OIR200** - Adds the ability to retrieve information if the tax was overridden.
- **hasTaxOverwrite** – New attribute on the LineItem/TaxDetail node in the response: boolean. Usage in OIR, is as follows:

  ```xml
  <TaxDetail taxCode="" hasTaxOverwrite="true" />
  ```

For more information, see the Developer Wiki page.

### Inheritance and Exemptions

The following new parameters have been added to support both total rate and jurisdiction level overrides:

- **Standing Orders** – To enable inheritance of tax overrides for standing orders, set the ContinuitiesInheritOverwrittenTaxes company parameter to True.
- **Exemptions** – To apply tax exemptions to jurisdiction-level overrides, set the OverwrittenTaxesRespectExemptions company parameter to True.
Shippers and Shipping Methods

This section provides instruction on how to set up shippers and shipping methods within OMX.

Shippers Overview

Shippers are the companies that physically transport the items in orders to customers. For more information, see Carriers Overview.

After viewing the list of shippers, you can add and update shippers. You cannot remove a shipper after it has been added. See Adding a Shipper and Updating a Shipper.

Carriers Overview

Carriers are a subset of shippers, some of which allow for real-time rates when shipping items. Currently, only UPS real-time rates are supported.

OMX sets up the carrier based on information provided.

Standard carriers in OMX include:

- FedEx
- UPS
- USPS
- DHL

You can add a custom carrier to work in conjunction with a third-party shipping application, and configure it with its own unique carrier services. If you do not want to use real-time rates for shipping, you need to set up shippers.

Note: After you have added a carrier, you cannot update it. You can remove a standard carrier, but not a custom carrier.

Viewing the List of Shippers

View the list of shippers when you want to add a shipper or update a shipper. See Adding a Shipper and Updating a Shipper.

To view the list of shippers:

2. In the Fulfillment and Shipping section of the Setup window, click Shipping Methods.

At the top of the page, the Available Shippers window appears.
Viewing the List of Shippers

This window displays the shippers that currently exist. The following information is included:

- **ID** (hyperlink) – The ID associated with the shipper. OMX automatically generates this number.
- **Shipper** – The description of the shipper.
- **Carrier** – The name of the carrier associated with the shipper (if applicable).

3. You can perform the following operations:
   - To update a shipper, click the **ID** hyperlink of the shipper. See Updating a Shipper.
   - To add a shipper, click **Add Shipper**. See Adding a Shipper.

### Adding a Shipper

You need to add each shipper separately.

**To add a shipper:**

1. On the **Setup** tab, click Configure: **Your Account**.
2. In the Fulfillment and Shipping section of the Setup window, click **Shipping Methods**.
3. On the Available Shippers window, click **Add Shipper**.
   
   The New Shipper window appears.

4. In the **Description** field, enter a description of the shipper (max. 35 characters).
5. (optional) In the **Tracking URL** field, enter a tracking URL.
6. (optional) Use the Carrier list to select a carrier.
7. To save your information, click Update.

Updating a Shipper

You can update all aspects of a shipper except for the ID number.

To update a shipper:

2. In the Fulfillment and Shipping section of the Setup window, click Shipping Methods.
3. Click the ID hyperlink of the shipper that you want to update.
The Shipper Parameters window appears.

This window displays the information that was previously entered for the selected shipper.
4. In the Description field, update the description of the shipper (max. 35 characters).
5. (optional) In the Tracking URL field, update the tracking URL for this shipper.
6. (optional) Use the Carrier list to indicate if carrier rates should be used with this shipper.
   Carriers are a type of shipper that allow for real-time rates when shipping items.
7. To save your information, click Update.

Shipping Methods Overview

A shipping method indicates how items in an order are delivered, and the cost of delivery.
A shipping method is associated with a shipper, which is the company that physically delivers the items.

Shipping methods can also be associated with carriers. A carrier is a type of shipper that lets you use real-time rates when shipping items.

After you view the list of shipping methods, you can add and update them. You cannot remove a shipping method.

After you create at least one shipping method, you need to link the shipping method with a keycode. You can also create shipping policies for a shipping method. A shipping policy is a set of rules about shipping items.

Viewing the List of Shipping Methods

You can view all of the shipping methods that have been created.
To view the list of shipping methods:

2. In the Fulfillment and Shipping section of the Setup window, click Shipping Methods.

At the bottom of the page, the Available Shipping Methods window appears.

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
<th>Fulfillment Code</th>
<th>Default Price</th>
<th>Active</th>
</tr>
</thead>
<tbody>
<tr>
<td>26</td>
<td>APX 2.0Q Test</td>
<td></td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td>18</td>
<td>Express</td>
<td>GC4</td>
<td>3.00</td>
<td>✔</td>
</tr>
<tr>
<td>22</td>
<td>Standard</td>
<td></td>
<td>0.00</td>
<td>✔</td>
</tr>
<tr>
<td>23</td>
<td>Amazon Expedited</td>
<td></td>
<td>0.00</td>
<td>✔</td>
</tr>
<tr>
<td>25</td>
<td>International</td>
<td></td>
<td>0.00</td>
<td>✔</td>
</tr>
<tr>
<td>29</td>
<td>white arrow</td>
<td></td>
<td>0.00</td>
<td>✔</td>
</tr>
<tr>
<td>37</td>
<td>Anyway</td>
<td></td>
<td>0.00</td>
<td>✔</td>
</tr>
<tr>
<td>38</td>
<td>Domestic</td>
<td></td>
<td>0.00</td>
<td>✔</td>
</tr>
<tr>
<td>44</td>
<td>Flat Rate - Fixed</td>
<td></td>
<td>0.00</td>
<td>✔</td>
</tr>
<tr>
<td>43</td>
<td>Overnight</td>
<td></td>
<td>0.00</td>
<td>✔</td>
</tr>
</tbody>
</table>

This window displays all shipping methods that have been created, divided by shipper. The following information is included:

- **Code** (hyperlink) – The code that is associated with the shipping method. This code is automatically generated.
- **Description** – The description of the shipping method.
- **Fulfillment Code** – The fulfillment code associated with the shipping method.
- **Default Price** – The default price for the shipping method.
- **Active** – Indicates if the shipping method is active or inactive.

3. You can perform the following operations:
   - To update the selected shipping method, click the Code hyperlink. See Updating a Shipping Method.
   - To add a shipping method, click Add Method. See Adding a Shipping Method.

### Adding a Shipping Method

Some shippers offer multiple shipping methods. For these shippers, you need to select a shipping method.

Before you can add a new shipping method, you must create at least one shipper.

Before you can use a new shipping method in orders, you must link the shipping method with a keycode.

**To add a shipping method:**

2. In the Fulfillment and Shipping section of the Setup window, click Shipping Methods.
3. In the Available Shipping Methods window, click Add Method.
Adding a Shipping Method

The New Shipping Method window appears.

4. To make the shipping method active, check the Active box. An inactive shipping method cannot be specified in any keycode.
5. In the Description field, enter a description of the shipping method. This can help you identify the shipping method on other pages.
6. (optional) Use the Shipper list to select the shipper for the shipping method. This value can help you identify your shipping methods when there may be no way to match them up in the shipping software you are using. For example, a value of 003 in this field relates to UPS’ Standard Ground shipping service.

   **Note:** This value is optional because, although it is especially helpful for UPS reference, you can map these fields explicitly in the software.

7. (optional) In the Default Price field, enter the default price for this shipping method.
8. If the cost for the shipping method can be overwritten during order entry, check the Overwrite Shipping box.
9. (optional) In the Sort Code field, enter a value to help determine the sorting priority when:
   - your account is configured for cart-bin picking
   - you have selected the SH Sort Code option in your fulfillment file

   **Tip:** You can enter up to 10 numbers, letters, and special characters.

   **Note:** This field is available only when the BEPNG parameter is set to True. Setting the BEPNG company parameter to True enables OMX’s new batch processing system, BEP 2.0. Setting BEPNG to True displays the Template Management menu option. Setting BEPNG to False (or not setting it) displays the Layouts menu option instead.

10. To save your information, click Update.

Updating a Shipping Method

You can update the information in a shipping method.

**To update a shipping method:**

2. In the Fulfillment and Shipping section of the Setup window, click Shipping Methods.

3. On the Available Shipping Methods window, click the ID hyperlink of the shipping method that you want to update.

   The Shipper Parameters window appears.

   ![Shipper Parameters](image)

4. To make the shipping method active, check the Active box.
   
   An inactive shipping method cannot be specified in any keycode.

5. In the Description field, update the description of the shipping method.

   This can help you identify the shipping method on other screens.

6. Use the Shipper list to select the shipper for the shipping method.

   This indicates that the selected shipper transports the items to customers using this method.

7. (optional) In the Fulfillment field, update the ID of the fulfillment file associated with this shipping method.

   **Tip:** For a list of fulfillment IDs, in the Fulfillment and Shipping section of the Setup window, click Fulfillment Files.

8. (optional) In the Default Price field, update the default price for this shipping method.

9. If the cost for the shipping method can be overwritten during order entry, check the Overwrite Shipping box.

10. (optional) In the Sort Code field, update the value that helps determine the sorting priority. This value applies when your account is configured for cart-bin picking including the SH Sort Code option in your fulfillment file.

    You can enter up to 10 numbers, letters, and special characters.

    **Note:** This field is available only when the BEPNG company parameter is set to True.

11. To save your information, click Update.

### Linking a Shipping Method with a Keycode

You can link a shipping method with an existing keycode.

**To link a shipping method with a keycode:**

1. Add at least one shipper. See Adding a Shipper.
2. Add at least one shipping method. See Adding a Shipping Method.
3. On the Marketing tab, click Manage: Keycodes.
Linking a Shipping Method with a Keycode

The Edit Keycode window appears.

4. In the **Keycode** field, enter the name of the keycode that you want to link to a shipping method, then click **Edit**.

   The Manage Keycode page appears.

   **Tip:** You can access this page by entering `K keycode` in the command line.

5. In the Shipping Methods section, click **Edit**. The Shipping Methods window appears.

   ![Shipping Methods Window]

<table>
<thead>
<tr>
<th>Available</th>
<th>Default</th>
<th>Shipping Method</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>APX - APX 2 PCA Test</td>
<td>0</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Default - Amazon Expedited</td>
<td>0</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Default - Anyway</td>
<td>0</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Default - Domestic</td>
<td>0</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Default - Express</td>
<td>3</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Default - Flat Rate - Fixed</td>
<td>0</td>
</tr>
</tbody>
</table>

6. In the **Available** column, check the boxes of those shipping methods that you want to be available for this keycode.

7. In the **Default** column, select the option button of the shipping method to be the default for this keycode.

8. In the **Price** column, enter the prices to be charged for each selected shipping method.

   **Note:** To charge additional shipping costs, you may include surcharges at the item level or implement a shipping policy. A shipping policy lets you take into consideration the weight and dollar volume of items in an order. To create a shipping policy, see the help topic **Shipping Policies**. If all of these features are applied, the charges are aggregated to determine the final shipping and handling cost.

9. To activate real time UPS rates, check the **Add Carrier fee** box.

10. To save your information, click **Update**.

### Viewing the List of Fulfillment Files

You can view all fulfillment files that have been created.

**To view the list of fulfillment files:**

1. On the **Setup** tab, click Configure: **Your Account**.
2. In the Fulfillment and Shipping section of the Setup window, click **Fulfillment Files**.

   The Fulfillment Files window appears.
## Viewing the List of Fulfillment Files

The following columns are included:
- **ID (hyperlink)** – The ID of the fulfillment file. This ID is generated automatically as soon as the fulfillment file has been created successfully.
- **Description** – The description of the fulfillment file.
- **Recipient** – The vendor who receives the fulfillment file.

3. You can perform the following operations:
   - To update a fulfillment file, click the **ID (hyperlink)** of the fulfillment file.
   - To add a fulfillment file, click **New**.

<table>
<thead>
<tr>
<th>ID</th>
<th>Description</th>
<th>Recipient</th>
<th>Active</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>Default1</td>
<td>TKK</td>
<td>✔️</td>
</tr>
<tr>
<td>1</td>
<td>New File Type II</td>
<td>Guest User demo</td>
<td>✔️</td>
</tr>
<tr>
<td>2</td>
<td>New File Type 2</td>
<td>testing0.627194</td>
<td>✔️</td>
</tr>
<tr>
<td>3</td>
<td>New File Type</td>
<td>Guest User demo</td>
<td>✔️</td>
</tr>
<tr>
<td>4</td>
<td>BD Test File</td>
<td>testing0.627194</td>
<td>✔️</td>
</tr>
<tr>
<td>5</td>
<td>PTest</td>
<td>testing0.627194</td>
<td>✔️</td>
</tr>
<tr>
<td>6</td>
<td>Item Size 1</td>
<td>Guest User</td>
<td>✔️</td>
</tr>
<tr>
<td>7</td>
<td>Jarros Goods</td>
<td>TKK</td>
<td>✔️</td>
</tr>
<tr>
<td>8</td>
<td>New File Type</td>
<td>Test for access levels</td>
<td>✔️</td>
</tr>
</tbody>
</table>