

Deactivating Tax Profiles

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This guide explains the process for deactivating tax profiles. It is intended for system administrators.

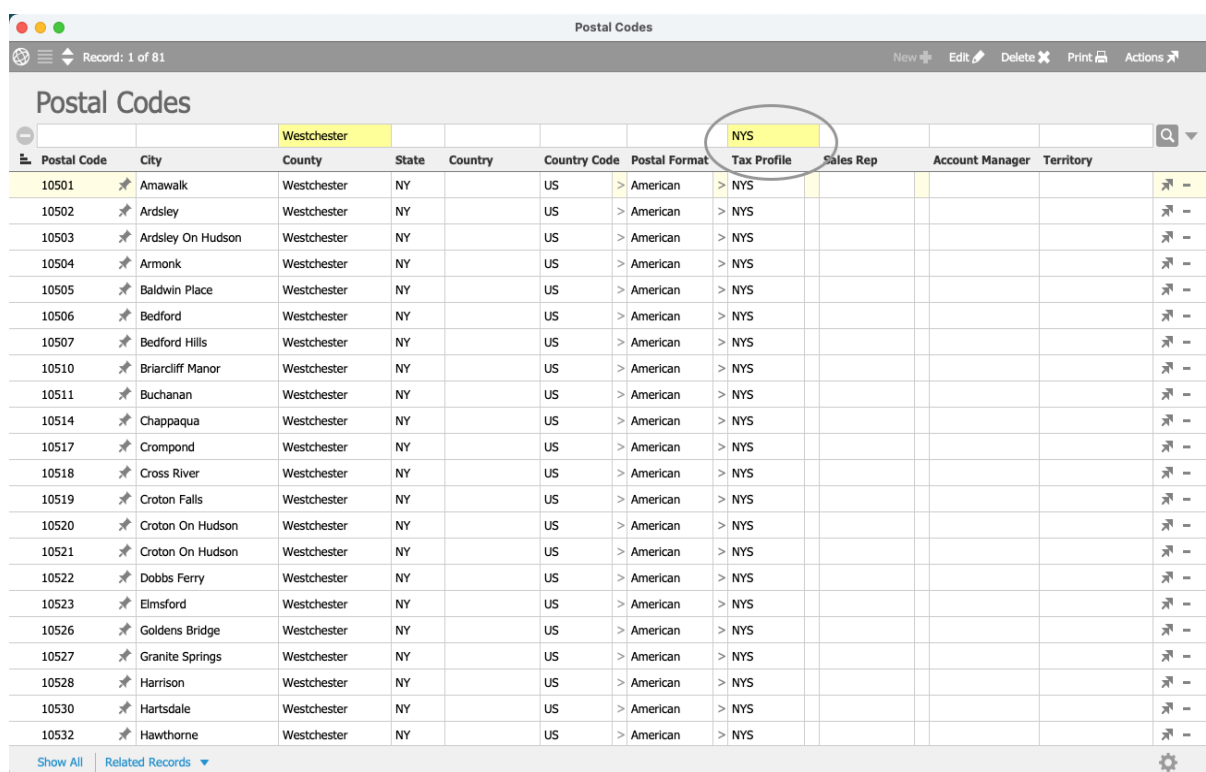
You may need to deactivate tax profiles due to updated tax rates or as part of the AvaTax setup. To properly deactivate a tax profile, you must remove the tax profile from related postal codes and company records, then deactivate the tax profile.

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Remove Tax Profiles from Postal Codes

1. From the Main Menu, go to **System Admin > Postal Codes**.
2. Use the Quick Search bar to locate the postal codes you want to clear.
You can search by the Tax Profile field to locate postal codes with linked tax profiles.



Postal Code	City	County	State	Country	Country Code	Postal Format	Tax Profile	Sales Rep	Account Manager	Territory
10501	Amawalk	Westchester	NY	US	> American	> NYS				
10502	Ardsley	Westchester	NY	US	> American	> NYS				
10503	Ardsley On Hudson	Westchester	NY	US	> American	> NYS				
10504	Armonk	Westchester	NY	US	> American	> NYS				
10505	Baldwin Place	Westchester	NY	US	> American	> NYS				
10506	Bedford	Westchester	NY	US	> American	> NYS				
10507	Bedford Hills	Westchester	NY	US	> American	> NYS				
10510	Briarcliff Manor	Westchester	NY	US	> American	> NYS				
10511	Buchanan	Westchester	NY	US	> American	> NYS				
10514	Chappaqua	Westchester	NY	US	> American	> NYS				
10517	Crompond	Westchester	NY	US	> American	> NYS				
10518	Cross River	Westchester	NY	US	> American	> NYS				
10519	Croton Falls	Westchester	NY	US	> American	> NYS				
10520	Croton On Hudson	Westchester	NY	US	> American	> NYS				
10521	Croton On Hudson	Westchester	NY	US	> American	> NYS				
10522	Dobbs Ferry	Westchester	NY	US	> American	> NYS				
10523	Elmsford	Westchester	NY	US	> American	> NYS				
10526	Goldens Bridge	Westchester	NY	US	> American	> NYS				
10527	Granite Springs	Westchester	NY	US	> American	> NYS				
10528	Harrison	Westchester	NY	US	> American	> NYS				
10530	Hartsdale	Westchester	NY	US	> American	> NYS				
10532	Hawthorne	Westchester	NY	US	> American	> NYS				

3. Select **Edit > Update Tax Profile for List**.

4. Select **Clear**.

aACE will remove any tax profiles that are linked to the postal codes in your list.

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Remove Tax Profiles on Company Records

You can perform a batch search and update to remove tax profiles from multiple company records. Ensure you review each company record before removing the tax profile to avoid removing other important tax profiles (e.g. tax exempt).

1. From the Main Menu, go to **CRM & Sales > Companies**.
2. Select the **Search Options** icon (), then select **Go to Advanced Search**.
3. In the Tax Details settings, enter values for Tax Profile or Abbr.

The screenshot shows the 'Companies' form in aACE. The 'Tax Details' section is expanded, and the 'Tax Profile' dropdown is highlighted with a red circle, showing 'New York' as the selected option. Other sections include 'Payee Address', 'Purchasing Setup', 'Shipping Setup', 'Finance & Accounting', 'Customer Setup', 'Vendor Setup', 'Payment Defaults', 'Customer Finance', 'Current Purchasing', 'Contacts', 'Linked Companies', 'Linked Contacts', and 'Linked Lists'.

4. Select **Perform Find**.
5. Select **Edit > Update Tax Profile for List**.
6. Select **Clear**.

aACE will remove any tax profiles that are linked to the company records in your list.

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Deactivate Tax Profiles

You can only deactivate a tax profile if there is not a linked postal code or company record. If a postal code or company record is linked to the tax profile, aACE will not deactivate it and explain the reason.

1. From the Main Menu, go to **Accounting > Tax Profiles**.
2. Use the Quick Search bar to locate the tax profiles you want to deactivate.
3. Select **Actions > Deactivate List**.
4. Select **Deactivate**.