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Cloud Basics for Administrators

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Get started with Genesys Multicloud CX

Contents

- 1 View requirements
- 2 Add resources
- 3 Adjust your routing strategies and resources
- 4 Try out your environment

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- Administrator

Find out how to set up and test your contact center.

Your contact center comes pre-configured with the functions and settings needed to distribute inbound calls and perform other tasks. After reviewing system requirements, you can add resources, adjust settings, and modify routing behavior as needed. Then try out your environment by staging calls and viewing reports.

View requirements

Before you begin working with your environment, review system and other requirements:

- Genesys Multicloud CX system requirements
- Applications, roles, and permissions
- Password rules
- Single sign-on

Add resources

Using Agent Setup, you can add resources as you need them.

- Agents, administrators, and supervisors
- Skills
- Agent groups
- DNs
- Virtual Queues

Adjust your routing strategies and resources

Use Designer to adjust your routing strategies and resources, including:

- Business controls
- Media files and collections
- Digital messaging resources

Try out your environment

To try out your environment:

1. From your Portal, log in to Agent Workspace with an agent account (you can create one in Agent Setup). Make sure the agent has been assigned the Skills to be targeted by your routing application. Also, make sure the agent is in possession of a phone set (corporate SIP Phone or PSTN phone, or even a personal cell phone) and that the phone number associated with this set is configured as this agent's extension.
2. Make this agent ready in Agent Workspace for Voice (this is a default state).
3. Call the number associated with the test application (provided by Genesys), and navigate to the IVR Menu option intended to initiate routing to a skill target possessed by your agent.
4. Your agent phone will ring.
5. Accept the call on your phone set.
 - Click **Accept** in the pop-up window if you are using a SIP Phone.
 - Answer the call through your device if you are using a PSTN phone or a personal cell phone.
6. Use the navigation buttons to put the call on hold, retrieve the call, transfer the call to another phone number, or simply terminate the call.
7. You can also initiate an outbound call by entering the phone number in the phone input field.
8. Once the call is complete, the call statistics are updated on the Dashboard.
9. To check real-time reports, log into Pulse by clicking Real-Time Reporting in Portal.
10. To check historical reports, log into CX Insights by clicking Historical Reporting in Portal.

Genesys Portal application access

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- [1 All Apps](#)
- [2 User](#)
- [3 Administration](#)
- [4 Support](#)

- Administrator
- Agent
- Developer
- Supervisor

The Portal is the Engage cloud gateway application, where you can launch applications and find help.

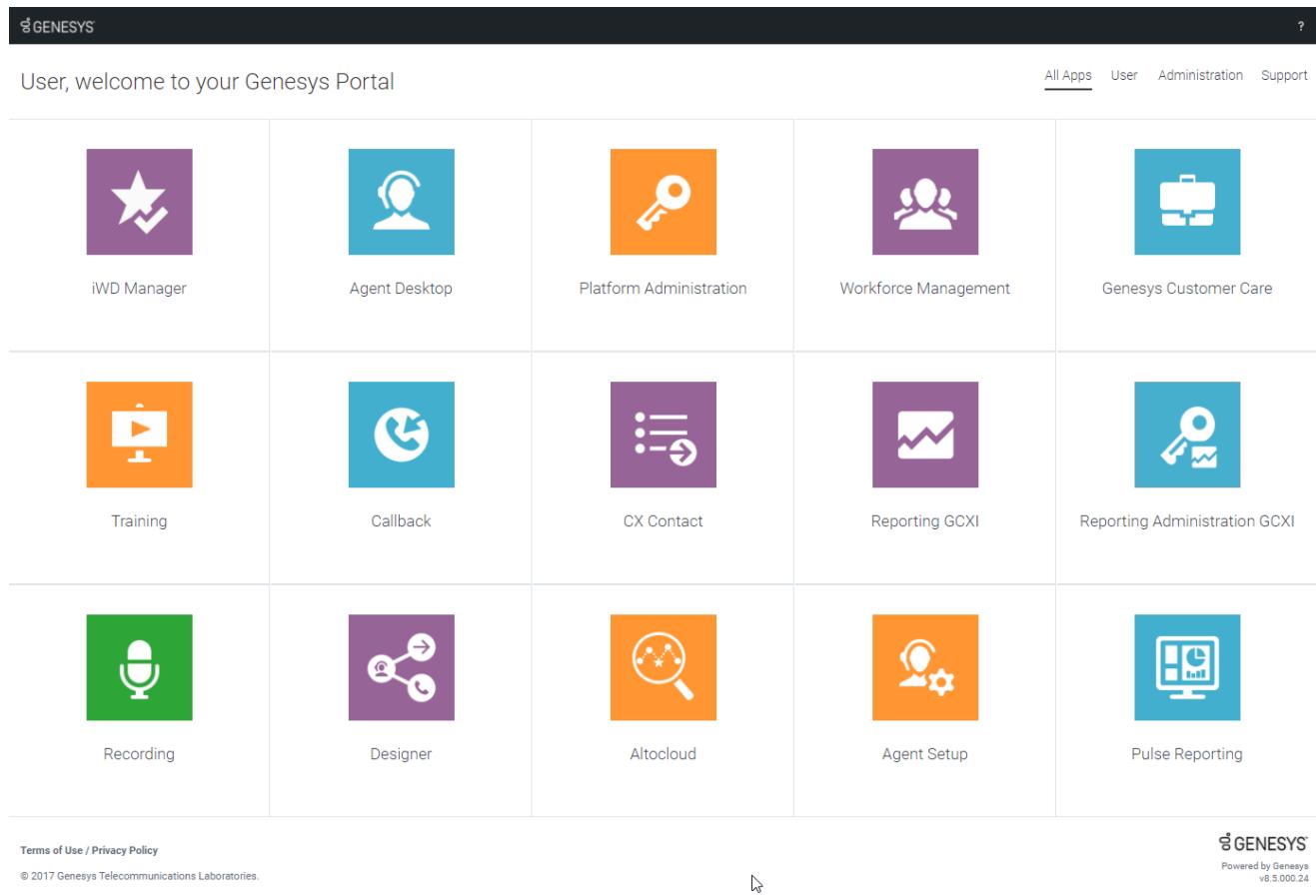
Use your browser to access the Genesys Portal landing page. The application icons you see depend on your role.

You can find all of your company's Genesys applications in the **All Apps** tab. Apps for agents and supervisors, such as Agent Workspace, Workforce Management, and Reporting, appear under the **User** tab.

View **Documentation** and **eLearning** from the Help (?) menu, located in the upper right corner of Genesys Portal.

Genesys Portal application access

All Apps



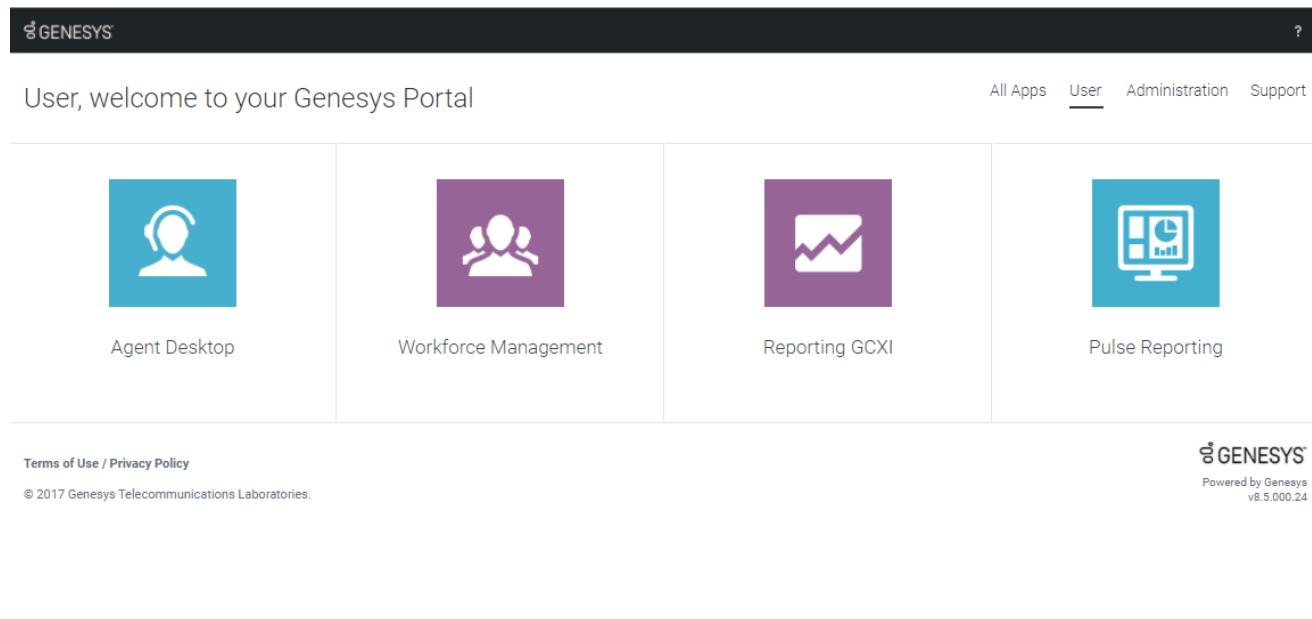
The screenshot shows the 'All Apps' tab in the Genesys Portal. The page has a header with the Genesys logo, a search bar, and navigation links for 'All Apps', 'User', 'Administration', and 'Support'. Below the header is a welcome message: 'User, welcome to your Genesys Portal'. The main content is a 3x5 grid of application icons and names:

				
iWD Manager	Agent Desktop	Platform Administration	Workforce Management	Genesys Customer Care
				
Training	Callback	CX Contact	Reporting GCXI	Reporting Administration GCXI
				
Recording	Designer	Altocloud	Agent Setup	Pulse Reporting

At the bottom left is a link to 'Terms of Use / Privacy Policy' and '© 2017 Genesys Telecommunications Laboratories'. At the bottom right is the Genesys logo and the text 'Powered by Genesys v8.5.000.24'.

The All Apps tab contains all the available applications for all applicable roles.

User



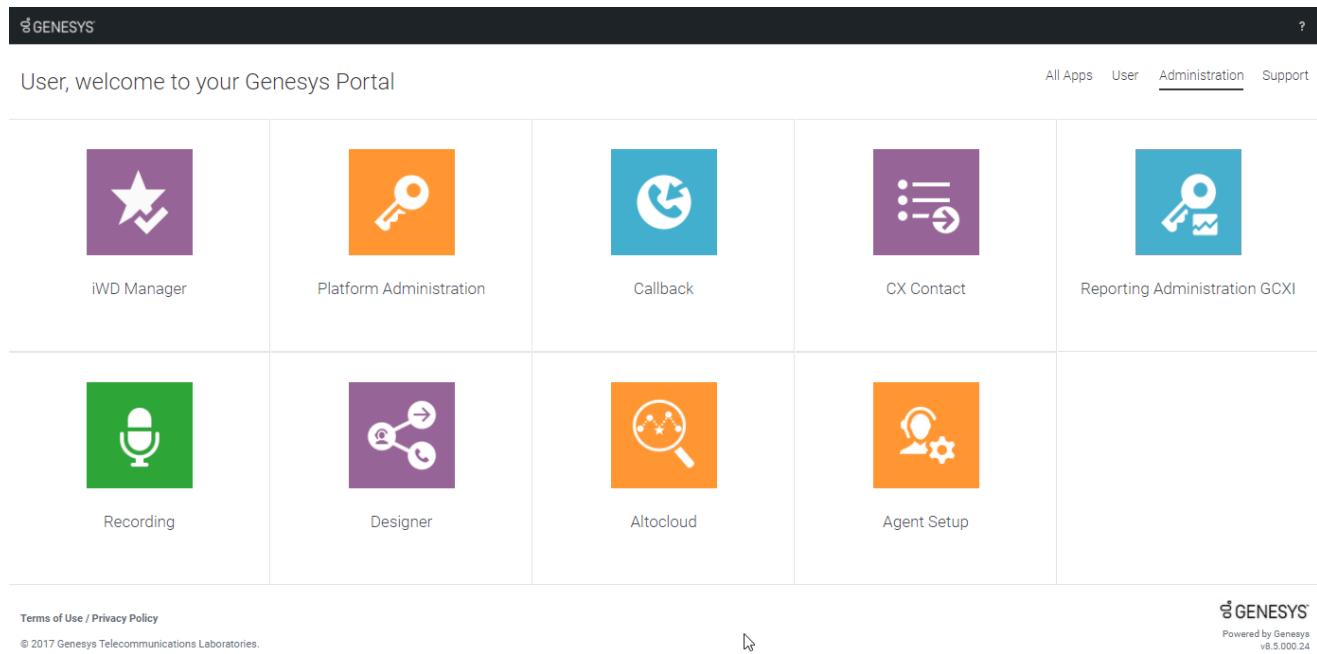
The screenshot shows the Genesys Portal interface with the 'User' tab selected. The top navigation bar includes the Genesys logo, a search bar, and links for 'All Apps', 'User' (which is underlined in blue), 'Administration', and 'Support'. The main content area displays four application tiles arranged in a 2x2 grid:

- Agent Desktop**: Represented by a blue icon of a person wearing a headset.
- Workforce Management**: Represented by a purple icon showing two people in a team.
- Reporting GCXI**: Represented by a purple icon showing a line graph.
- Pulse Reporting**: Represented by a blue icon showing a computer monitor with a chart.

At the bottom left, there are links for 'Terms of Use / Privacy Policy' and '© 2017 Genesys Telecommunications Laboratories'. At the bottom right, the Genesys logo is followed by the text 'Powered by Genesys v8.5.000.24'.

The User tab includes the applications for agents and supervisors.

Administration



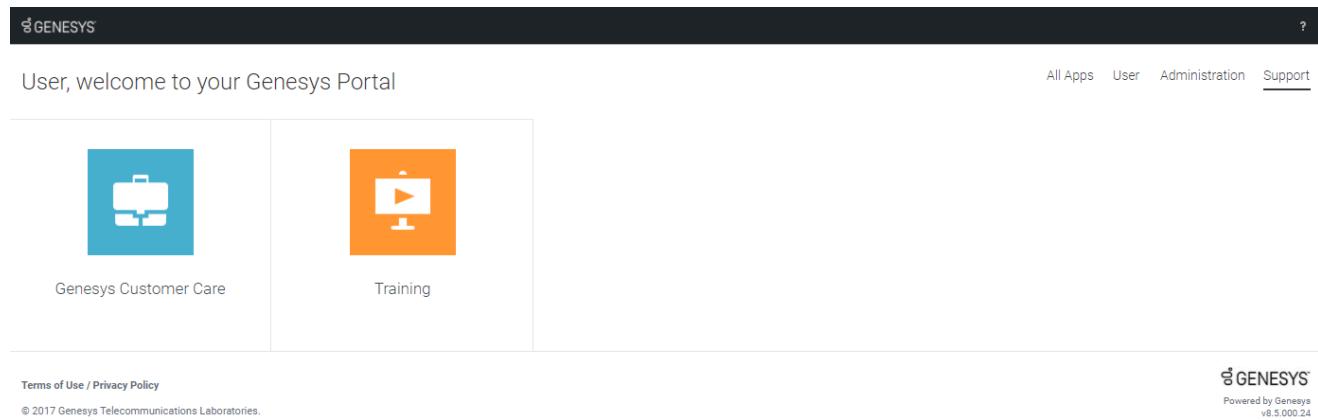
The screenshot shows the Genesys Portal interface with the 'Administration' tab selected. The page is titled 'User, welcome to your Genesys Portal'. The administration section is organized into a grid of application icons and names:

iWD Manager	Platform Administration	Callback	CX Contact	Reporting Administration GCXI
Recording	Designer	Altocloud	Agent Setup	

At the bottom of the page, there are links for 'Terms of Use / Privacy Policy' and '© 2017 Genesys Telecommunications Laboratories.' On the right, there is a 'Powered by Genesys v8.5.000.24' logo.

The Administration tab includes applications for administrators and developers.

Support



The screenshot shows the Genesys Portal interface with the 'Support' tab selected. The top navigation bar includes the Genesys logo, a search bar, and links for 'All Apps', 'User', 'Administration', and 'Support'. The main content area displays two large buttons: 'Genesys Customer Care' (blue icon of a briefcase) and 'Training' (orange icon of a computer monitor with a play button). At the bottom, there are links for 'Terms of Use / Privacy Policy' and '© 2017 Genesys Telecommunications Laboratories', along with the Genesys logo and version information 'Powered by Genesys v8.5.000.24'.

The Support tab offers access to Genesys Customer Care and Training.

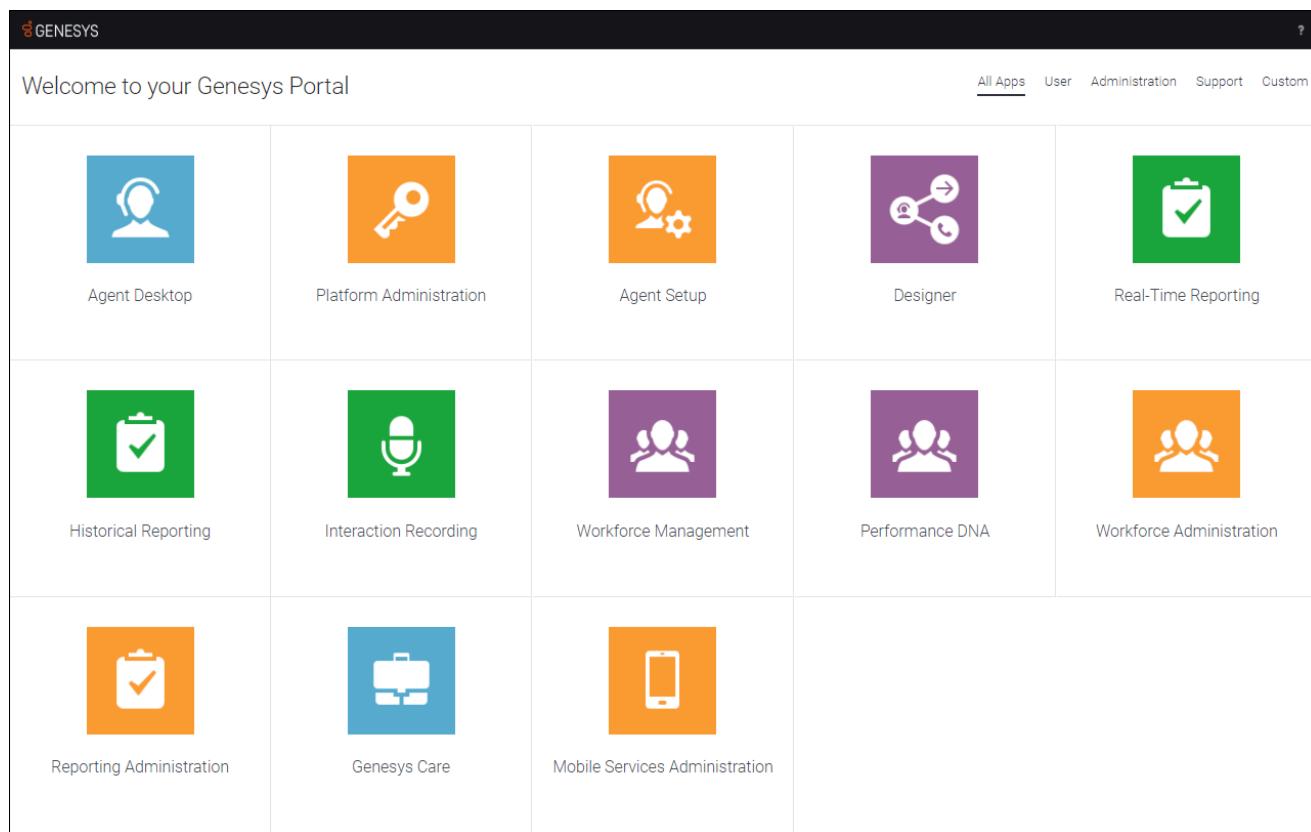
Applications, roles, and permissions

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- [1 Access to User Interfaces](#)
- [2 Role Access](#)
- [3 Account Types](#)
- [4 Password Rules](#)
 - [4.1 Managing User Passwords](#)
 - [4.2 Changing a Password](#)
- [5 Using Accounts in Applications](#)

Learn about the applications available in Genesys Multicloud CX and who can access them.

Access to User Interfaces



Genesys Portal is the main access point to all Genesys Multicloud CX user interfaces (UIs).

These interfaces are divided into three categories, which you can select by clicking the corresponding category links at the top of the Portal. The categories are:

User interfaces – User interfaces are standard Contact Server user interfaces, such as Agent Workspace, Workforce Management, and Reporting. These interfaces can be used by contact-center agents, supervisors, and managers.

Administration interfaces – Administration interfaces can be used by contact-center administrators, supervisors, and managers to configure users and applications based on their roles.

Support interfaces – Support interfaces are used by authorized contact-center administrators to submit requests with Genesys Customer Care, and to view the service status and schedule of service

for Genesys applications.

User Documentation and **eLearning** are accessed via the Help (?) menu, located in the top-right corner of Genesys Portal.

Application	Application Description
Agent Workspace	Agent Workspace provides agents and knowledge workers with non-intrusive access to the information, processes, and applications they need to perform their jobs more efficiently.
Agent Scripting Administration	Agent Scripting Administration is a scripting tool that is used to prompt agents throughout the call-handling process with customers.
Designer	Genesys Designer helps you to design assisted service or Routing applications, as well as self-service or Interactive Voice Response (IVR) applications.
Genesys Customer Care	Genesys Customer Care is a portal for Genesys customers to locate resources, tools and information that will aid in resolving your issues, including the ability to create and track tickets based on Salesforce.
IVR Administration	IVR Administration assists your business with providing cost-effective customer interactions 24/7 for voice, video, and web-based interactions.
Outbound	Outbound Contact is an automated system for creating, modifying, running, and reporting on outbound campaigns for proactive customer contact. Outbound Contact Server (OCS) provides automated dialing and call-progress detection, so that an agent is required only when a customer is connected. OCS also intelligently uses customer data to ensure that campaigns are contacting the right customers, not just a large number of customers.
Agent Setup	Agent Setup helps you to manage your user accounts and configure settings to maintain your contact center.
Recording	Recording provides recording control via a host of integrations across the suite. The recorded segments are linked to the contact's account history, and include information about date and time, duration, and the parties involved for each segment.
Reporting	Reporting assists contact-center managers in: <ul style="list-style-type: none"> Assessing the day-to-day operations of their contact center resources for the routing and handling of interactions. Better tuning resources to increase utilization

Application	Application Description
	<p>and efficiency.</p> <ul style="list-style-type: none"> • Benchmarking key performance indicators of quality and service. • Identifying corrective actions to help reduce costs and increase service.
Reporting Administration	Reporting Administration is used to provision new users for Reporting.
Workforce Management	Workforce Management (WFM) provides tools to enable contact-center managers to better manage their workforce. WFM enables managers to create accurate staffing plans that take into account projected contact volumes and average handle times, as well as the various skills and skill levels of the agent population. Contact center managers can achieve these goals, by using WFM's advanced forecasting, scheduling, and real-time adherence capabilities.

Role Access

Access to Genesys Portal applications is provided based on the following user roles:

Application/Role	Agent	Supervisor	CC Manager	Administrator
Agent Workspace		*	*	*
Agent Scripting Administration				
Agent Setup		++	+++	+
Callback		**	**	
Designer		***	***	
Genesys Customer Care				
IVR Administration				
Outbound				
Platform Administration	****			
Recording				
Reporting				
Reporting Administration				
Training				
Workforce	*****	*****	*****	*****

Application/Role	Agent	Supervisor	CC Manager	Administrator
Management				

Important

* - Separate Agent accounts must be created for Supervisors, Managers, and Administrators. See [How to create an Agent account for Supervisors, Managers, and Administrators with dual role in Platform Administration](#).

** - Supervisors and Managers have read-only access to callbacks and callback configuration.

*** - Supervisors and Managers only have access to modify Designer parameters.

**** - Agents only have the ability to change their own password in Platform Administration.

***** - Agents work on a different UI from Supervisors, Managers, and Administrators.

+ - Read and write access.

++ - Limited read and write access.

+++ - This role is not defined within Agent Setup.

Account Types

The following types of accounts are provisioned in Genesys Multicloud CX:

Account Type	Provisioned By	Provisioning Tool	LDAP enabled*	Note
Agent Scripting Administration Account	Genesys	Agent Scripting	No	
Customer Care Account	Genesys	Genesys Salesforce	No	
IVR Administration Account	Customer Administrator	IVR Administration	Yes	One per IVR Administration region
Outbound Account	Genesys	Genesys Multicloud CX	No	
Platform Account	Customer Administrator	Platform Administration	Yes	
Reporting Account	Customer Administrator	Reporting Administration	No	

Important

- Certain types of accounts – as specified in the table – can be configured to use authentication through customer LDAP-compatible directory service.
- It is recommended that all accounts for a particular user be created with the same user name and password. The table above outlines the different authentication and authorization systems where separate user accounts need to be created.
- The recommended naming convention for user accounts is the following: @, for example: john.bull@acme.com. It is important to include in the user name as unique name domain identifier.
- For supervisor/administrator users who need access to the Agent Workspace or Agent Workforce Management interface, the suggested naming convention is the following: @.agent

Password Rules

User accounts are required to meet the following password rules:

- **Password Length** - Must include a minimum of 8 characters.
- **Password Complexity** - Must include lowercase, uppercase and a number.
- **Password Lockout** - After 5 failed login attempts, the user account is locked for 30 minutes.
- **Password Changes** - Must be changed every 90 days.
- **Password Re-use** - Cannot re-use any of their last 5 passwords.

Managing User Passwords

A user may be configured to set a new password the first they log in, or after a system administrator has reset their password. In this case, the **Change Password** dialog box appears.

To change the password, the user must complete the following steps:

1. Enter a new password in the **New Password** field.
2. Enter the same password in the **Confirm Password** field.
3. Click **Ok**.

Changing a Password

If configured, a user can change their password at any time, using the following procedure:

1. Log in to the user account in Platform Administration.
The user's first name appears in the top header bar of the window.

2. Select the first name.
3. Click **Change Password**.
4. In the **Change Password** dialog box, enter the current password, enter a new password and confirm the new password.
5. Click **Save**.

Using Accounts in Applications

The table below lists correlation between account types and Genesys Multicloud CX applications.

Application/Account	Account	Notes on Provisioning
Agent Workspace	Platform Account	
Agent Scripting Administration	Agent Scripting Account	Account should be enabled by Genesys for use in this interface
Designer	Platform Account	
Genesys Customer Care	Customer Care Account	
IVR Administration	IVR Administration Account	
Outbound	Genesys Multicloud CX Account	Account should be enabled by Genesys for use in this interface
Platform Administration	Platform Account	
Recording	Platform Account	
Reporting	Reporting Account	
Reporting Administration	Reporting Account	
Training	No account needed	
Workforce Management	Platform Account	Account should be assigned to security group in WFM by customer administrator

Single sign-on

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- 1 IdP-initiated login
- 2 SSO support by application
- 3 Configuring SSO in Genesys Multicloud CX
- 4 Configuring SSO in the identity provider
- 5 SAML settings

Learn how single sign-on is supported in Genesys Multicloud CX.

Most Genesys Multicloud CX applications use single sign-on (SSO) to allow a logged-in user to navigate across supported applications without prompting for credentials again. Genesys Multicloud CX can also be configured to use SAML 2.0 for integrations with third-party identity providers (IdP) such as Okta or Google. There are many advantages to enabling SSO in Genesys Multicloud CX—for example:

- Users need to remember only one password.
- User credentials are managed by a third-party identity provider.
- Users must have multi-factor authentication by a third-party identity provider for additional security.
- Users only need to log in once to gain access to Genesys Multicloud CX applications that have SSO enabled and non-Genesys applications that use the same identity provider.

For details about how a user logs in with SSO, see [Log in to Genesys Multicloud CX](#).

IdP-initiated login

Genesys Multicloud CX supports IdP-initiated login using the SAML Single Sign-on integration. With this type of login, you can set up your own portal with links to Genesys Multicloud CX applications. When a user is logged in to your IdP, they can click a link in the portal and directly log in to the Genesys application.

Set up this functionality in your IdP by providing the URL of the target application as part of the redirect URL. For example, the redirect URL for Agent Workspace would be in this format:
redirectUrl=https://ui/wwe/index.html

To get the URL for an application, go to your Genesys Portal page and click the application's widget. Immediately after, press "escape" on your keyboard to prevent the Authentication login page from loading so you can see the application URL in the browser.

SSO support by application

View which Genesys Multicloud CX applications support SSO.

Applications	Single Sign On Support	Notes
Agent Workspace	Yes	
Agent Setup	Yes	
Callback	Yes	
Cloud Data Download Service	Yes	

Applications	Single Sign On Support	Notes
CX Contact	Yes	
Designer	Yes	
Genesys CX Insights	Yes	Supported in version 9.0.013.0+. Contact your Genesys representative to enable.
Genesys Softphone	Yes	
Screen Recording	Yes	Supported in Agent Workspace version 9, but not with custom desktops.
Real-Time Reporting (Pulse)	Yes	Supported in Real-Time Reporting version 9 on selective deployments. Contact your Genesys representative for details.
Gplus Adapter Salesforce	Yes	
Recording, Quality Management and Speech Analytics	Yes	
Workforce Management	Yes	
Agent Scripting Administration	No	
Interactive Insights	No	
Outbound	No	
Platform Administration (GAX) <i>Includes plug-ins like eServices Manager and IVR Administration</i>	No	
WebRTC	Yes	

Configuring SSO in Genesys Multicloud CX

To enable single sign-on for your environments, see [Single Sign-On in Agent Setup](#).

Important

SSO can be configured for different groups and you can have multiple identity providers, as long as there is only one per region.

If you're planning to enable SSO, consider the following conventions for creating users:

- The domain declared in the identity provider metadata should be part of the user name stored within Genesys, to create the most seamless experience. (Example: john@mycompany.com) Otherwise, users would need to enter a Tenant or enter the domain before their username. (Example: mycompany\john)

- The username provisioned within Genesys Multicloud CX should match the username in the external identity provider.

Configuring SSO in the identity provider

Genesys Multicloud CX must be defined as an application within the identity provider to support the SSO integration.

Genesys Multicloud CX supports the SAML 2.0 protocol as a standard interface to identity providers, and has successfully validated with popular IdPs, including Okta and Ping. Other identity providers can be supported provided they comply with SAML 2.0 and you validate the integration before using in production.

SAML settings

Genesys Multicloud CX supports some SAML configuration that must be set up by your Genesys representative:

- Configure "enforceAuthN" in SAML authentication requests. When enabled, Genesys Multicloud CX's Authentication Service sends an attribute to the IdP that tells it to re-authenticate the user, regardless of their previous state.

Popular tasks

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- 1 Topics often used by administrators

Find out how to perform common administrator tasks in Genesys Multicloud CX.

Topics often used by administrators

1. Create agents, administrators, and supervisors
2. Add skills
3. Manage agent groups
4. Manage voicemail
5. Modify business controls
6. Manage media resources
7. Generate historical reports
8. Generate and use real-time reports
9. Configure compliance rules
10. Manage campaigns

Voice taxes (United States)

Contents

- 1 Scenario 1: Activation of a toll-free number
- 2 Scenario 2: Monthly recurring charges for a toll-free number
- 3 Scenario 3: Activation of a DID number
- 4 Scenario 4: Monthly recurring charges for a DID number

- Administrator

This page lists the various taxes that regulatory authorities mandate for commercial enterprises (US customers only).

The following information is a high-level overview of the various taxes that regulatory authorities mandate for commercial enterprises (US customers only). Because the taxes vary based on the type of service and the tax jurisdiction, this information cannot cover every scenario that an enterprise might encounter.

Voice services have many different taxes based on the tax jurisdiction where the service is being consumed. Because taxation and regulation vary from state to state, the taxes are significant not only at the federal level, but also at the state and local level.

The taxes that can be assessed include the following:

- State and Local Sales and Use Tax
- Excise Tax
- Gross receipts tax
- Utility Users tax
- E911
- Local telecommunications taxes

Other regulatory fees that can be assessed include the following:

- Federal USF
- Regulatory Recovery Fee (including Federal TRS (Telecommunications Relay Service) Fund)
- North American Numbering Plan Administration
- Local Number Portability shared costs
- FCC Regulatory Fees

Note: The following scenarios are illustrative in nature and do not constitute the exact percentages and taxes charged by each jurisdiction. The actual invoice contains all the applicable taxes charged by the specific jurisdiction where the customer's business is located.

Scenario 1: Activation of a toll-free number

Customer purchases a toll-free number. What taxes can the customer expect on an invoice for purchasing and activating this number? The following examples list various taxes for three different locations. The revenue amount is \$1.

Location: Dallas, TX

Tax authority	Tax description	Revenue (\$)	Tax rate (%)	Fee rate (\$)	Percent taxable (%)	Tax amount (\$)
Federal	Federal Cost Recovery Charge	1.00	1.862	0	64.9	0.01
State	State Sales Tax	1.00	6.25	0	100	0.06
State	State Cost Recovery Fee	1.00	0	0	100	0
City	City Sales Tax	1.00	1.00	0	100	0.01
District	Dallas MTA	1.00	1.00	0	100	0.01
Total tax						0.09

Location: New York, NY

Tax authority	Tax description	Revenue (\$)	Tax rate (%)	Fee rate (\$)	Percent taxable (%)	Tax amount (\$)
Federal	Federal Cost Recovery Charge	1.00	1.862	0	64.9	0.01
State	State Sales Tax	1.00	4.00	0	100	0.04
State	NY State Excise Tax	1.00	2.5	0	100	0.03
City	County Sales Tax	1.00	4.5	0	100	0.05
District	Metro Commuter Trans. District	1.00	0.375	0	100	0.00
District	NY MTA Surcharge on Excise Tax	1.00	0.595	0	100	0.01
Total tax						0.14

Location: San Francisco, CA

Tax authority	Tax description	Revenue (\$)	Tax rate (%)	Fee rate (\$)	Percent taxable (%)	Tax amount (\$)
Federal	Federal Cost Recovery Charge	1.00	1.862	0	64.9	0.01
State	CA Telecom Relay Systems	1.00	.50	0	100	0.01

Tax authority	Tax description	Revenue (\$)	Tax rate (%)	Fee rate (\$)	Percent taxable (%)	Tax amount (\$)
	Surcharge					
State	CA Teleconnect Fund	1.00	1.08	0	100	0.01
State	CA High Cost Fund(A) Surcharge	1.00	0.35	0	100	0.00
State	CA Universal Lifeline Surcharge	1.00	4.75	0	100	0.05
Total tax						0.08

Scenario 2: Monthly recurring charges for a toll-free number

Customer purchases a toll-free number. What taxes can the customer expect on an invoice for monthly recurring charges for this number? The following examples list various taxes for three different locations. The revenue amount is \$1.

Location: Dallas, TX

Tax authority	Tax description	Revenue (\$)	Tax rate (%)	Fee rate (\$)	Percent taxable (%)	Tax amount (\$)
Federal	FCC Fee Toll Free Number	1.00	0	0.01	100	0.01
Federal	Federal Cost Recovery Charge	1.00	1.862	0	64.9	0.01
State	State Sales Tax	1.00	6.25	0	100	0.06
State	State Cost Recovery Fee	1.00	0	0	100	0
City	City Sales Tax	1.00	1.00	0	100	0.01
District	Dallas MTA	1.00	1.00	0	100	0.01
Total tax						0.10

Location: New York, NY

Tax authority	Tax description	Revenue (\$)	Tax rate (%)	Fee rate (\$)	Percent taxable (%)	Tax amount (\$)
Federal	FCC Fee Toll Free Number	1.00	0	0.01	100	0.01
Federal	Federal Cost	1.00	1.862	0	64.9	0.01

Tax authority	Tax description	Revenue (\$)	Tax rate (%)	Fee rate (\$)	Percent taxable (%)	Tax amount (\$)
	Recovery Charge					
State	State Sales Tax	1.00	4.00	0	100	0.04
State	NY State Excise Tax	1.00	2.5	0	100	0.03
City	County Sales Tax	1.00	4.5	0	100	0.05
District	Metro Commuter Trans. District	1.00	0.375	0	100	0.00
District	NY MTA Surcharge on Excise Tax	1.00	0.595	0	100	0.01
Total tax						0.15

Location: San Francisco, CA

Tax authority	Tax description	Revenue (\$)	Tax rate (%)	Fee rate (\$)	Percent taxable (%)	Tax amount (\$)
Federal	FCC Fee Toll Free Number	1.00	0	0.01	100	0.01
Federal	Federal Cost Recovery Charge	1.00	1.862	0	64.9	0.01
State	CA Emer Tel. Users Surcharge	1.00	0.75	0	100	0.01
State	CA Telecom Relay Systems Surcharge	1.00	0.50	0	100	0.01
State	CA Teleconnect Fund	1.00	1.08	0	100	0.01
State	CA High Cost Fund(A) Surcharge	1.00	0.35	0	100	0.00
State	CA Universal Lifeline Surcharge	1.00	4.75	0	100	0.05
Total tax						0.10

Scenario 3: Activation of a DID number

Customer purchases a DID number. What taxes can the customer expect on an invoice for purchasing and activating this number? The following examples list various taxes for three different locations. The revenue amount is \$1.

Location: Dallas, TX

Tax authority	Tax description	Revenue (\$)	Tax rate (%)	Fee rate (\$)	Percent taxable (%)	Tax amount (\$)
Federal	Federal Universal Service Fee	1.00	17.4	0	64.9	0.11
Federal	Federal Cost Recovery Charge	1.00	1.862	0	64.9	0.01
State	State Sales Tax	1.00	6.25	0	100	0.07
State	State Cost Recovery Fee	1.00	0	0	100	0
City	City Sales Tax	1.00	1.00	0	100	0.01
District	Dallas MTA	1.00	1.00	0	100	0.01
Total tax						0.21

Location: New York, NY

Tax authority	Tax description	Revenue (\$)	Tax rate (%)	Fee rate (\$)	Percent taxable (%)	Tax amount (\$)
Federal	FCC Universal Service Fund	1.00	17.4	0.01	64.9	0.11
Federal	Federal Cost Recovery Charge	1.00	1.862	0	64.9	0.01
State	State Sales Tax	1.00	4.00	0	100	0.05
State	NY State Excise Tax	1.00	2.5	0	100	0.03
City	County Sales Tax	1.00	4.5	0	100	0.06
City	Local Gross Receipts Tax	1.00	2.35	0	100	0.02
District	Metro Commuter Trans.	1.00	0.375	0	100	0.00

Tax authority	Tax description	Revenue (\$)	Tax rate (%)	Fee rate (\$)	Percent taxable (%)	Tax amount (\$)
	District					
District	NY MTA Surcharge on Excise Tax	1.00	0.595	0	100	0.01
Total tax						0.29

Location: San Francisco, CA

Tax authority	Tax description	Revenue (\$)	Tax rate (%)	Fee rate (\$)	Percent taxable (%)	Tax amount (\$)
Federal	Federal Universal Service Fund	1.00	17.4	0	64.9	0.11
Federal	Federal Cost Recovery Charge	1.00	1.862	0	64.9	0.01
State	CA Telecom Relay Systems Surcharge	1.00	0.50	0	35.1	0
State	CA Teleconnect Fund	1.00	1.08	0	35.1	0
State	CA High Cost Fund(A) Surcharge	1.00	0.35	0	35.1	0
State	CA Universal Lifeline Surcharge	1.00	4.75	0	35.1	0.02
Total tax						0.14

Scenario 4: Monthly recurring charges for a DID number

Customer purchases a DID number. What taxes can the customer expect on an invoice for monthly recurring charges for this number? The following examples list various taxes for three different locations. The revenue amount is \$1.

Location: Dallas, TX

Tax authority	Tax description	Revenue (\$)	Tax rate (%)	Fee rate (\$)	Percent taxable (%)	Tax amount (\$)
Federal	FCC Universal	1.00	17.4	0	64.9	0.11

Voice taxes (United States)

Tax authority	Tax description	Revenue (\$)	Tax rate (%)	Fee rate (\$)	Percent taxable (%)	Tax amount (\$)
	Service Fee					
Federal	Federal Cost Recovery Charge	1.00	1.862	0	64.9	0.01
State	State Sales Tax	1.00	6.25	0	100	0.17
State	9-1-1 Equalization Fee	1.00	0	0.06	100	0.06
State	State Cost Recovery Fee	1.00	0	0	100	0
City	City Sales Tax	1.00	1.00	0	100	0.03
City	Municipal Right of Way Fee	1.00	0	1.64	100	1.64
City	Dallas 9-1-1 Fee	1.00	0	0.62	100	0.62
District	Dallas MTA	1.00	1.00	0	100	0.03
	Total tax					2.67

Note: The total tax amount is comparatively high for commercial enterprises in Texas due to the fees.

Location: New York, NY

Tax authority	Tax description	Revenue (\$)	Tax rate (%)	Fee rate (\$)	Percent taxable (%)	Tax amount (\$)
Federal	Federal Universal Service Fund	1.00	17.4	0.01	64.9	0.11
Federal	Federal Cost Recovery Charge	1.00	1.862	0	64.9	0.01
State	State Sales Tax	1.00	4.00	0	100	0.05
State	NY State Excise Tax	1.00	2.5	0	100	0.03
City	County Sales Tax	1.00	4.5	0	100	0.06
City	Local Gross Receipts Tax	1.00	2.35	0	100	0.02
City	NYC E-911 Surcharge	1.00	0	1.00	100	1.00

Tax authority	Tax description	Revenue (\$)	Tax rate (%)	Fee rate (\$)	Percent taxable (%)	Tax amount (\$)
District	Metro Commuter Trans. District	1.00	0.375	0	100	0
District	NY MTA Surcharge on Excise Tax	1.00	0.595	0	100	0.01
Total tax						1.29

Location: San Francisco, CA

Tax authority	Tax description	Revenue (\$)	Tax rate (%)	Fee rate (\$)	Percent taxable (%)	Tax amount (\$)
Federal	FCC Universal Service Fund	1.00	17.4	0	64.9	0.11
Federal	Federal Cost Recovery Charge	1.00	1.862	0	64.9	0.01
State	CA Emer Tel. Users Surcharge	1.00	0.75	0	35.1	0
State	CA Telecom Relay Systems Surcharge	1.00	0.50	0	35.1	0
State	CA Teleconnect Fund	1.00	1.08	0	35.1	0
State	CA High Cost Fund(A) Surcharge	1.00	0.35	0	35.1	0
State	CA Universal Lifeline Surcharge	1.00	4.75	0	35.1	0.02
County	San Francisco Access Line Tax	1.00	0	3.27	100	3.27
Total tax						3.41