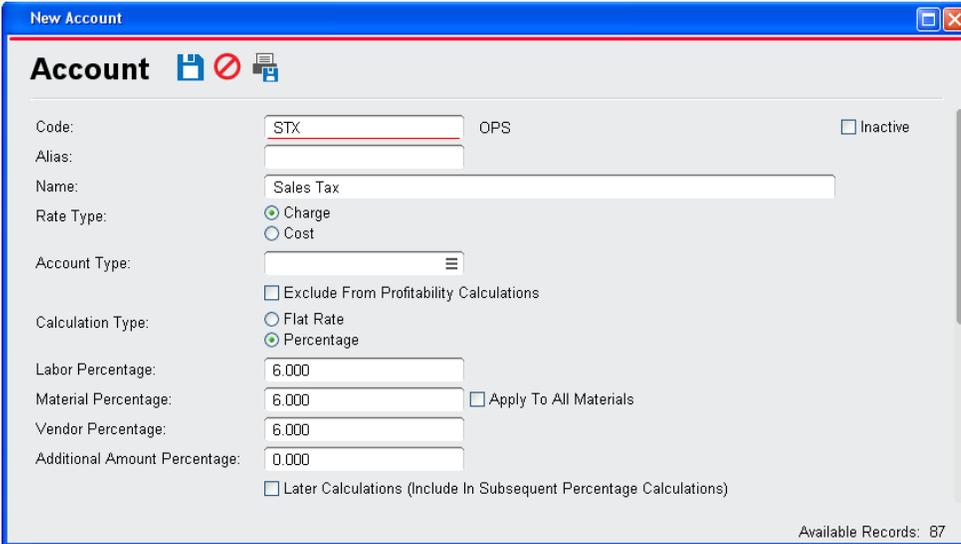


**Updating the Sales Tax/Admin Fees for your site and your Tenants**

1. In the Financial tab, click on Accounts, edit the existing Sales Tax record (or add in a new Account record by clicking on the plus icon). Include the appropriate percentages for your property.



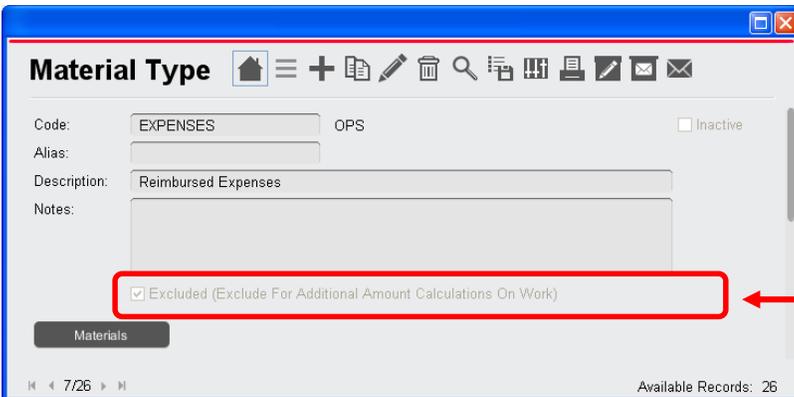
**Labor Percentage:** this percent will apply on Labor charges.

**Material Percentage:** this percentage will apply on Material charges for those materials that are linked to a taxable Material Type (i.e. the excluded check box in Material Type is NOT checked).

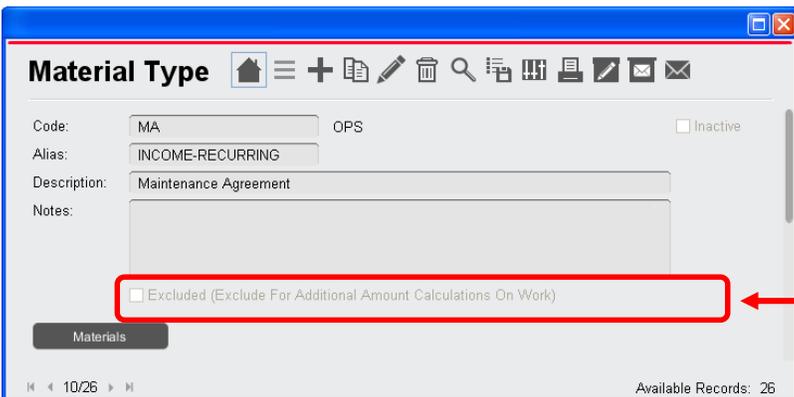
If you click the “Apply To All Materials” checkbox here ALL material charges regardless of the Material Type that the materials are linked to, will have the percentage applied.

**Vendor Percentage:** this percent will apply to all Vendor charges.

**Additional Amount Percentage:** this percent will apply on the total charges of your work order.



Materials linked to this Material Type will NOT be taxed.

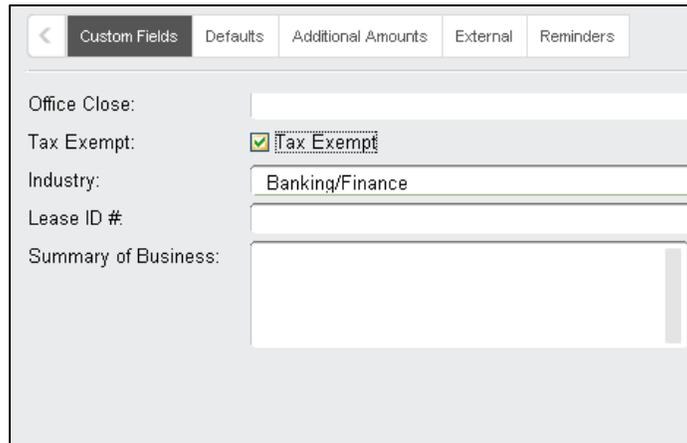


Materials linked to this Material Type will be taxed.

**IMPORTANT:** make sure you edit your Sales Tax Account before the next steps...updating the Tenant tax rates. *The tax percentages will default properly **only** if you have edited the Sales Tax account.*

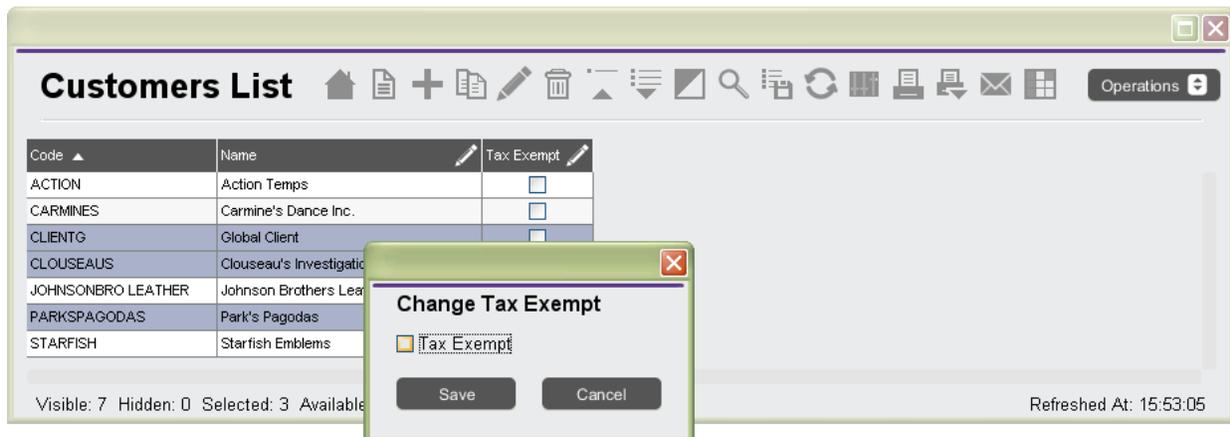


- Next, in the Tenant capsule denote any Tenants that are tax exempt by checking the Tax Exempt checkbox located in the Custom Fields tab of the Tenant record.



**REMINDER:** to quickly update the records, use the List.

- Add the Tax Exempt column/field to the List by right-mouse clicking on a column title and selecting Add Column.
- You can update multiple records via the List by highlighting records and clicking the Key icon in the column. Hold the Control Key (**Ctrl**) on your keyboard to highlight discontinuous records.



| Code               | Name                   | Tax Exempt               |
|--------------------|------------------------|--------------------------|
| ACTION             | Action Temps           | <input type="checkbox"/> |
| CARMINES           | Carmines Dance Inc.    | <input type="checkbox"/> |
| CLIENTG            | Global Client          | <input type="checkbox"/> |
| CLOUSEAUS          | Clouseau's Investigati | <input type="checkbox"/> |
| JOHNSONBRO LEATHER | Johnson Brothers Lea   | <input type="checkbox"/> |
| PARKSPAGODAS       | Park's Pagodas         | <input type="checkbox"/> |
| STARFISH           | Starfish Emblems       | <input type="checkbox"/> |

3. Next, hide any tenants that are tax exempt.

**REMINDER:** to hide Tax Exempt records:

- Sort the list by the field Tax Exempt – to sort, left-click on the column title.
- Highlighting all the Tax Exempt tenants.
- Click the Hide icon.



4. Next, link the proper sales tax to your non tax exempt tenants. To do this, enter the tax account (STX in our example) in the Additional Amounts tab for one of your tenants, save the change.

**Note:** if you use an Admin Fee in addition to Sales Tax OR in place of Sales Tax, follow the steps above; this process is the same. You need to see the Additional Amounts here as an accurate reflection of what you charge your tenant.

5. Then, use the Operation Copy Additional Amounts to copy the Account to all the other tenants in the list.

The operation will copy all Additional Amount detail lines (STX account in our example) into all the records in the list (it will not include the hidden records – tax exempt).