

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.

Account Imactive on Labor charges. Code: STX ops Alias: Imactive Material Percentage: this percentage will apply on Material charges for those materials that are linked to a taxable Name: Sales Tax material charges for those materials that are linked to a taxable
Code: STX OPS Inactive Material Percentage: this percentage with apply on Material charges for those materials that are linked to a taxable Name: Sales Tax materials that are linked to a taxable
Alias: Name: Sales Tax Rate Type: O Charge
Name: Sales Tax materials that are linked to a taxable
Rate Type: O Charge
O Cost Material Type (i.e. the excluded check bo
Account Type: In Material Type is NOT checked).
Calculation Type: O Flat Rate O Percentage If you click the "Apply To All Materials"
Labor Percentage: 6.000 checkbox here ALL material charges
Material Percentage: 6.000 Apply To All Materials regardless of the Material Type that the
Vendor Percentage: 6.000
Additional Amount Percentage: 0.000
Later Calculations (Include In Subsequent Percentage Calculations)
Available Records: 87 Vendor Percentage: this percent will
apply to all Vendor charges.
Additional Amount Percentage: this
Material Type $\blacksquare = + \blacksquare \nearrow \boxdot \land \blacksquare \land \blacksquare \blacksquare \blacksquare \blacksquare \blacksquare \blacksquare \blacksquare \blacksquare$
Alias:
Description: Reimbursed Expenses
Notes:
Excluded (Exclude For Additional Amount Calculations On Work)
this Material Type will
NOT be taxed.
M 🔹 7/26 » M Available Records: 26
Material Type 📄 🛨 🖻 🖍 🛱 🖽 📇 🖬 🖉 🔤 💌
Code: MA OPS Inactive
Alias: INCOME-RECURRING
Description: Maintenance Agreement
Notes:
Excluded (Exclude For Additional Amount Calculations On Work)
Material Type will be taxed.
N 4 10/26 N N Available Records: 26



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.*



2. 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.

Custom Fields	Defaults	Additional Amounts	External	Reminders	
Office Close:					
Tax Exempt:		Tax Exempt			
Industry:	В	anking/Finance			
Lease ID #					
Summary of Busine	ess:				

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.

Customer	s List 🔺	▯+๒╱๓ๅ╤◩९६०▥▮₽∞◨।	Operations ᅌ
Code 🔺	Name	🖍 Tax Exempt 🥕	
ACTION	Action Temps		
CARMINES	Carmine's Dance Inc.		
CLIENTG	Global Client		
CLOUSEAUS	Clouseau's Investigatio		
JOHNSONBRO LEATHER	Johnson Brothers Lea	Change Tex Exempt	
PARKSPAGODAS	Park's Pagodas	Change Tax Exempt	
STARFISH	Starfish Emblems	Tax Exempt	
Visible: 7 Hidden: 0 S	Selected: 3 Available	Save Cancel Refresh	ed At: 15:53:05



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.

Custome	rs List 🌰 🗎 🕂 🛙	
Code	Name 🧳	Tax Exempt 🔻
CLIENTG	Global Client	
PARKSPAGODAS	Park's Pagodas	
CLOUSEAUS	Clouseau's Investigations	
JOHNSONBRO LEATHER	Johnson Brothers Leather Goods	
STARFISH	Starfish Emblems	
CARMINES	Carmine's Dance Inc.	
ACTION	Action Temps	

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).