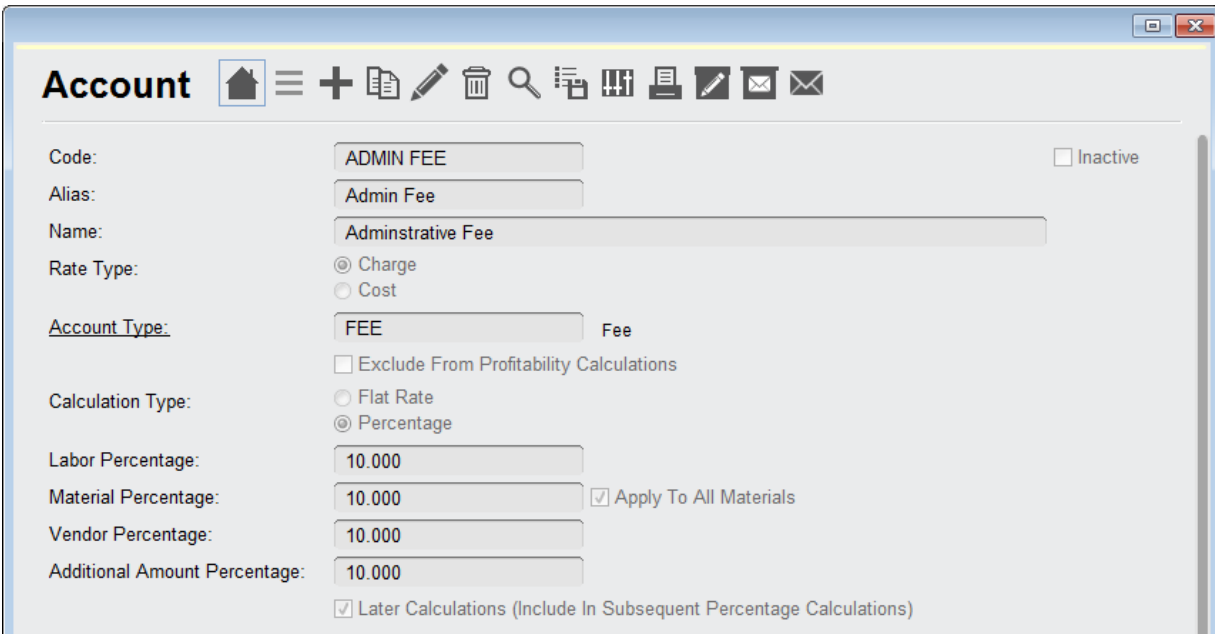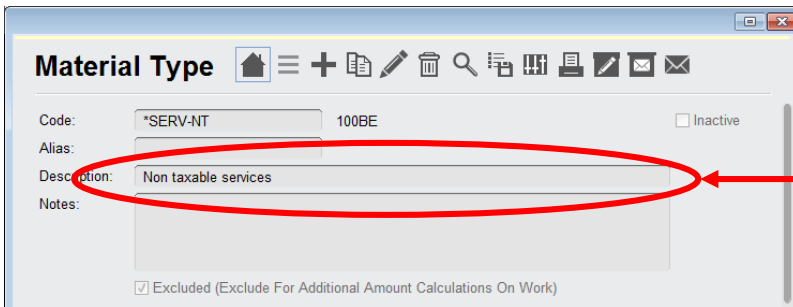AWAREMANAGER

1. In the Financial tab, click on Accounts.

2. 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 have additional amounts calculated.

Tenants
Groups or organizations your company serves

IMPORTANT: make sure you edit your Sales Tax Account before the next steps…updating the Client/Tenant tax rates. *The tax percentages will default properly **only if** you have edited the Sales Tax account.*
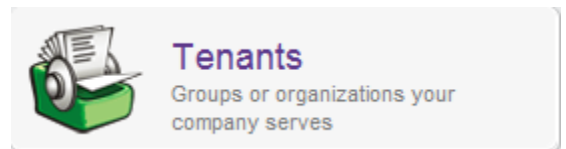
3. Next, in the Client/Tenant capsule denote any that are tax exempt by indicating (with a checkmark or "Y", depending on the field format) in the Custom Field **Tax Exempt**.
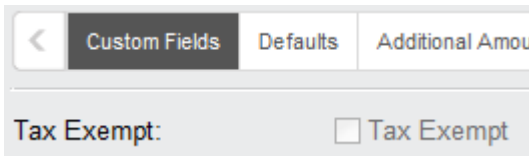
**REMINDER:** to quickly update the records… **use the List**
- Add the **Tax Exempt (Y)** column/field to the List by right-mouse clicking on a column title and selecting **Add Column**.

- You can update multiple records via the List by highlighting records and clicking the Key icon in the column. Hold the Control Key on your keyboard to highlight discontinuous records.
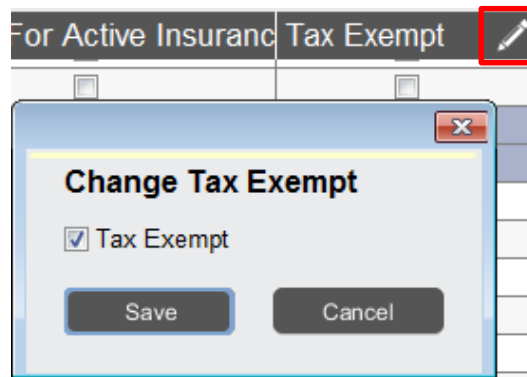
4. Next, hide any tenants that are tax exempt.

REMINDER: to hide Tax Exempt records
- Sort the list by the field Tax Exempt (Y) – *to sort left-click on the column title.*

- Highlighting all the Tax Exempt (Y) tenants.

- Click the flashlight icon to hide.
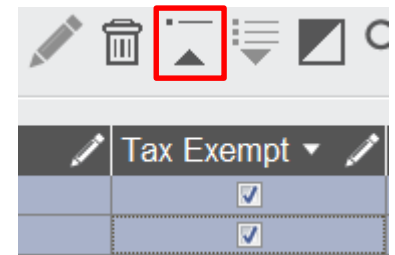
5. Next, link the proper sales tax to your <u>non tax exempt</u> tenants….

   o To do this, enter the tax account (STX in our example) in the **Additional Amounts** tab for one of your tenants, and 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.

Account	Description	Labor Percentage	Material Percentage	Vendor Percentage	Additional Amount Percentage
ADMIN FEE	Adminstrative Fee	10.000	10.000	10.000	10.000

6. 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).

Tenant List   Operations

Copy Additional Amounts
Generate Letters
Generate Emails

Code	Name ▲	Unit	Phone	Work Per
CRITICAL	Critical Care Resources	100-N BEAC-1...	617-565-8002	GALLEY.