## Linking Tax Profiles to Company Records

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This guide explains how to link a tax profile to a company record. It is intended for general users.

You can link a specific <u>tax profile (https://aace6.knowledgeowl.com/help/overview-of-tax-profiles)</u> directly to a company record to ensure the correct tax will be charged on new orders:

- 1. Navigate from Main Menu > CRM & Sales > Companies.
- 2. Use the <u>Quick Search (https://aace5.knowledgeowl.com/help/using-the-quick-search-bar)</u> bar to locate the desired company.
- 3. Click the **Finance & Accounting** tab, then click **Edit**, and select the correct tax profile from the **Tax Profile** field.

Company D	recarls	Jaies	& Marketing	Customer			endor Details		e & Accounting	Notic	es 🔒 🛛 Task	Record Aco	ess Rest	
Tax Details				Customer Setup				pproved 🗙 📌	Vendor Setup		Approved 3			
Tax ID	W-9	W-9 Exp Date	Tax Profile >	Q	Billing 1 Net 30		Ship Rate Ty Fixed Price		Rate Value 33.33	Payment Terms Net 30	Free Ship	Туре	Т	hreshol
Exemption No		Cert Exp Date	AVA	AvaTax		d >	Fixed Price		Disc %	Default Template	for POs			
Exemplean No	0		CA Cali		a	ustomer	Discount		Q.	Dereur Terriphote	101 1 0/3			(
Payment Defaults USE				< State				Credit Hold	Vendor Finance					
Payment Method I		Disbursement Memo (e.g. Account #)		Finance Charge Credit Limit A 7,500.00		A/R Balance	Credit Balance	Finance Charge Credit		Limit A/P Balance Credit Balance				
ACH Setup					Payment Accounts  Type Last 4 Digits Exp Date Name on A					Office		referred		
bank name				Тур	c	0011			ccount	="	P		*	
Routing Number Account Number					0011				=*			Fr.		
Account Type		Class												
			Info											

## 4. Click Save.

Note: When team members enter an order, they can manually change the assigned tax profile.