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.

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4. Click Save.

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