## Flagging Companies as Tax Exempt

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This guide explains how to exempt a company from taxes. It is intended for general users.

Some of your customers may be tax exempt. To ensure a customer's orders are tax exempt, enter the required information on the Company record:

- 1. Navigate from Main Menu > CRM & Sales > Companies.
- 2. Use the <u>Quick Search bar (https://aace6.knowledgeowl.com/help/using-the-quick-search-bar)</u> to locate the desired company.
- 3. On the Finance & Accounting tab, in the Tax Details section, enter the needed info.

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## 4. Click Save.

Tax exempt companies should be linked to a tax exempt profile. The tax exempt profile should be empty (i.e. no values set in Tax Setup, Default Rates, or Exceptions fields).