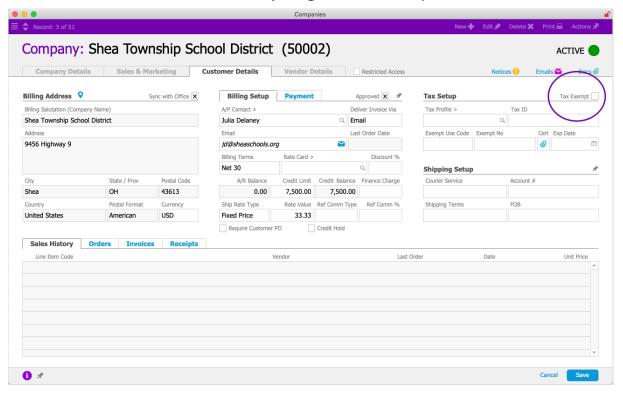
Flagging Companies as Tax Exempt

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Some of your customers may be tax exempt. The proper way to ensure a customer's orders are marked as tax exempt is to mark this flag at the Company record:

- 1. Navigate from Main Menu > CRM & Sales > Companies.
- 2. Use the Quick Search bar to locate the desired company.
- 3. At the detail view, mark the **Tax Exempt** flag in the Tax Setup section.



4. Click Save.

Marking this flag will initially set taxes to zero for every order this customer makes, regardless of other details. If a particular order for the customer does *not* qualify for this exemption (or if an order for a regular customer needs tax exemption), team members can manually clear or mark the Exempt flag in the totals section of the order record.

Because of <u>aACE's tax calculation methods</u> (https://aace5.knowledgeowl.com/help/understanding-tax-rate-calculations), flagging the company record is usually more effective than creating an 'exempt' tax profile.