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Tax Exempt Customer



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2 years ago · Updated

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Follow these steps to designate a customer exempt from taxes:

1. Search the customer and bring up their account. Click on their name to open the account settings:

2. In the account settings select the Admin tab, then check the box next to "Tax Exemption."

The screenshot shows the SMRT Systems Admin interface. At the top is a navigation bar with tabs: Profile, Preferences, Statistics, Route, Pickup, Notes, Prices, Admin (highlighted with a red box), and System. Below the navigation bar, the 'Settings' section is visible. It includes dropdown menus for Account Type (Standard), Discount (Select discount), Group (None), and Agent (Drip N Dry Cleaners). A 'Tax Exemption' checkbox is highlighted with a red box and is currently unchecked. Below this is an 'Apply Upcharge' checkbox which is checked. At the bottom of the settings are a 'Customer Site' link and a 'Deactivate account' button. To the right of the settings is a 'Linked Accounts' section with a 'Customer ID' input field and an 'Add' button. A large blue 'Save' button with a disk icon is highlighted with a red box in the bottom right corner of the settings area.

3. Lastly, just make sure to click Save!



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