

Setting up a Customer as Tax Exempt

| Department | Version | Publish Date |
|---------------------|---------|--------------|
| Accounts Receivable | 1.0 | 06/17/2024 |

Purpose

This document details the process of setting up a tax-exempt customer in NetSuite.

| Access | Resources |
|--|---|
|  NetSuite |  Box Sign Overview |

Procedure

- For each applicable Customer Location Record, complete the following fields:
 - In **ZIP CODE FOR TAXATION**, enter "Exempt" and press **TAB**.

Primary Information

CUSTOM FORM *

Custom Customer Form

INACTIVE

INACTIVE AS OF

CUSTOMER ID

CUST24445:206 Campus on Lake Austin #52845

TYPE

COMPANY

INDIVIDUAL

STATUS *

CUSTOMER-Closed Won

ZIP CODE FOR TAXATION *

Exempt

PARENT

CUST24

COMPAN

Campu

CATEGO

WH-Co

COMME

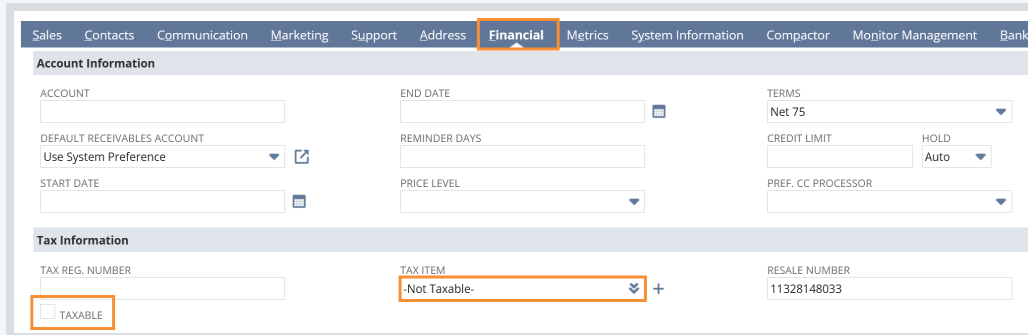
SPECIAL

PARENT

Compa

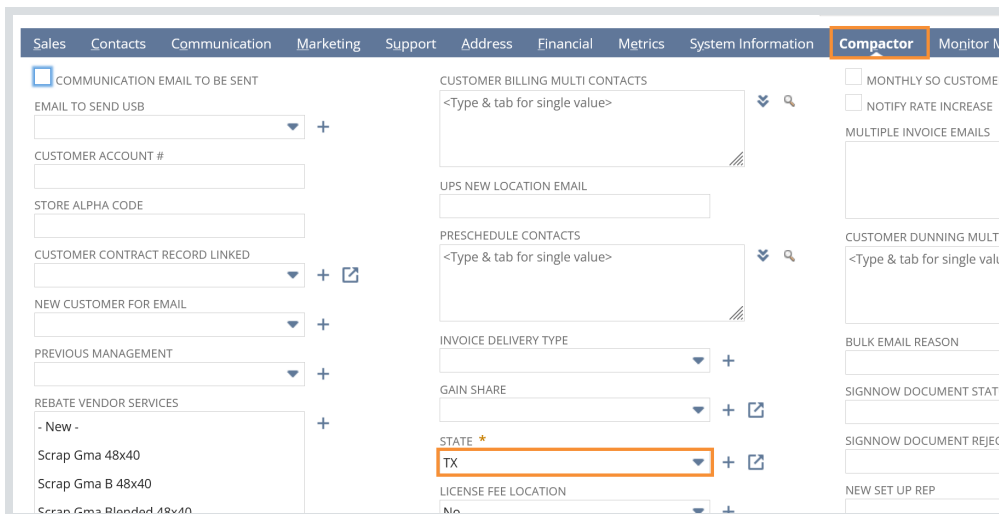
NOTE

After setting this value, the system updates the following automatically:

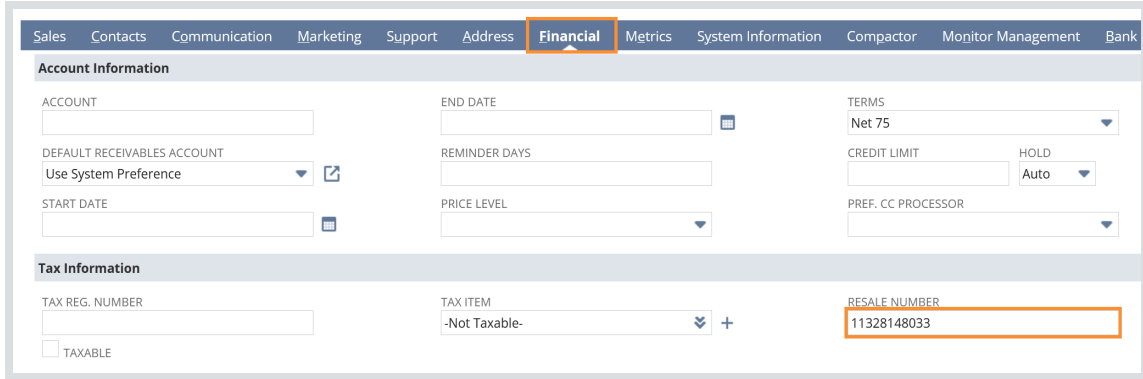


- **Financial** > **TAXABLE** checkbox is cleared.
- **Financial** > **TAX ITEM** is set to *-Not Taxable-*.

2. Choose the customer's state.



1. Go to the **Compactor** subtab.
2. For **STATE**, choose the applicable option.
3. (If applicable) enter the provided resale number.



Financial

Account Information

ACCOUNT: [Text Field] END DATE: [Text Field] TERMS: Net 75

DEFAULT RECEIVABLES ACCOUNT: Use System Preference REMINDER DAYS: [Text Field] CREDIT LIMIT: [Text Field] HOLD: Auto

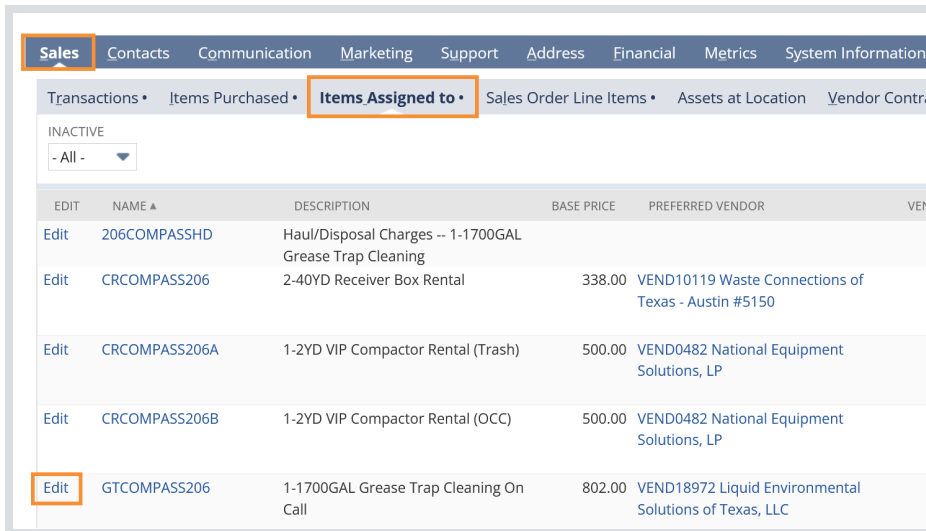
START DATE: [Text Field] PRICE LEVEL: [Text Field] PREF. CC PROCESSOR: [Text Field]

Tax Information

TAX REG. NUMBER: [Text Field] TAX ITEM: -Not Taxable- RESALE NUMBER: 11328148033

☐ TAXABLE

1. Go to the **Financial** subtab.
2. In **RESALE NUMBER**, enter the provided value.
4. Select **Save**.
2. For each applicable item, complete the following steps:
 1. Open the Item in edit mode.



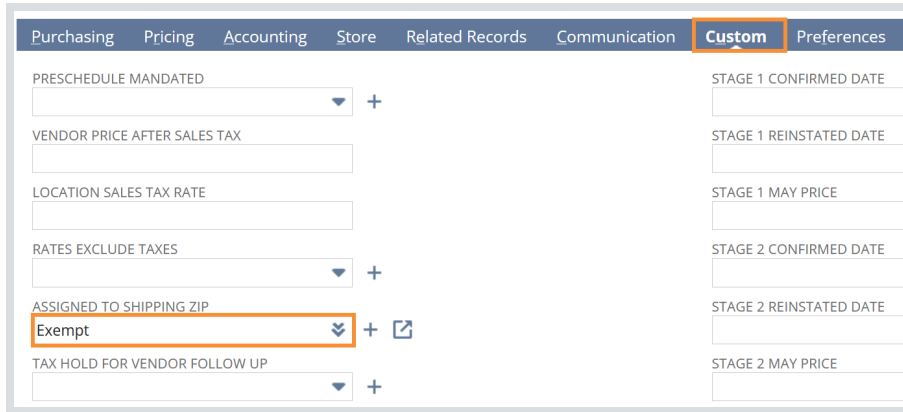
Sales | **Items Assigned to**

Transactions • Items Purchased • **Items Assigned to** • Sales Order Line Items • Assets at Location • Vendor Contra

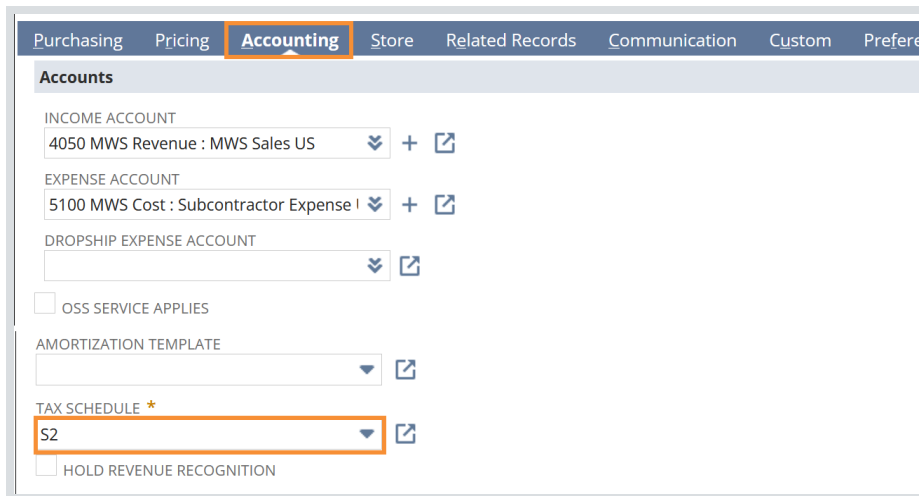
INACTIVE: - All -

| EDIT | NAME | DESCRIPTION | BASE PRICE | PREFERRED VENDOR | VEN |
|----------------------|---------------|---|------------|--|-----|
| Edit | 206COMPASSHD | Haul/Disposal Charges -- 1-1700GAL Grease Trap Cleaning | | | |
| Edit | CRCOMPASS206 | 2-40YD Receiver Box Rental | 338.00 | VEND10119 Waste Connections of Texas - Austin #5150 | |
| Edit | CRCOMPASS206A | 1-2YD VIP Compactor Rental (Trash) | 500.00 | VEND0482 National Equipment Solutions, LP | |
| Edit | CRCOMPASS206B | 1-2YD VIP Compactor Rental (OCC) | 500.00 | VEND0482 National Equipment Solutions, LP | |
| Edit | GTCOMPASS206 | 1-1700GAL Grease Trap Cleaning On Call | 802.00 | VEND18972 Liquid Environmental Solutions of Texas, LLC | |

1. On the Customer Record, go to **Sales > Items Assigned to**.
2. Select **Edit** on the Item to update.
2. Update the **ASSIGNED TO SHIPPING ZIP** to *Exempt*.



1. Go to the **Custom** subtab.
2. In **ASSIGNED TO SHIPPING ZIP**, enter "Exempt" and press **TAB**.
3. Update the **TAX SCHEDULE** to S2.



4. Go to the **Accounting** subtab.
5. For **TAX SCHEDULE**, choose S2.
3. Upload the customer-provided Resale Certificate to the Customer Record's *Box Content* subtab.

See [Box Sign Overview](#).

Revisions

| Date | Summary of Changes | Author |
|----------|--------------------|--------------|
| 6/3/2024 | Initial document. | Jared Peeler |

| Date | Summary of Changes | Author |
|------|--------------------|--------|
|------|--------------------|--------|

Reviews

| Date | Reviewer |
|----------|---------------|
| 6/3/2024 | Cooper Murphy |