

How to make a customer tax exempt (AlarmBiller)

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Organizations such as churches are tax exempt. Follow these steps to make a customer tax exempt

1) Log into the customers page in question, click on the Site/Sys tab below and click on the Site in question you would like to make tax exempt

The screenshot displays the AlarmBiller software interface. At the top, there is a navigation menu with tabs for Customers, Invoices, Payments, RMR, Work Orders, Proposals, Calendar, GL, Reports, Setup, and Accounting. A notification banner at the top reads "Simba is my Bimba!!". Below this, the customer profile for "Simba Steckel - 9000" is shown, including contact information, status (Active), and financial summary. A comments section contains the text "I love Simba!!". At the bottom, the "Sites/Systems" tab is active, showing a table of sites with columns for Site #, Site Name, Address, City, and State.

Site #	Site Name	Address	City	State
2	Beach House	123 Dream St.	Hollywood	FL
3	FLJI House	456 Dream St.	Fiji	OH
1	Simba Steckel	1341 Weathervane Lane	Akron	OH

2) Click the edit button and in the Tax Exempt field type in the Tax Exempt number or you may simply indicate that this customer is tax exempt

ABC Company Erick Support Logout

Customers Customer Search: name - cust #

Customers Invoices Payments RMR Work Orders Proposals Calendar GL Reports Setup Accounting

Edit Site: Simba Steckel - 9000 Cancel Save

Site Info:

Use Customer Address

FIJI House
456 Dream St.
Address 2
Fiji Ohio 4410... Plus 4

Phone: (330) 208-3568 ext.
Email:

Site Info:

Site Number: 3
Sales Tax: new - 0.0000%
Tax Exempt: No taxes for me
Site Since: 1/25/2014
Inactive:
Inactive Date:

Service Info:

Warranty Start Date: 1/25/2014
Warranty Labor: 12 MONTHS
Warranty Part: 12 MONTHS
Service Level: T&M-EMEKA

Comments

250 characters remaining

3) When you create an invoice, the customer will not be charged tax (you will receive a blue alert "The site is tax exempt, tax will not be calculated")

The site is tax exempt, tax will not be calculated.

New Manual Invoice: Simba Steckel - 9000

Customer Save and Deliver Save

Invoice Number: 11676

PO Number:

Invoice Date: 6/28/2024

Due Date: 9/26/2024

Contact:

Customer Site: #3 FIJI House - 456 Dream St.

Sales Tax: ohio base - 5.7500%

Term: 90 Days

Salesperson: Brad Solomon

Delivery Method: Mail

Sales Package: Select a Sales Package:

Warehouse: Main Warehouse -...

COGS Account: 50000 - Materials

Items Total	Parts Total	Estimated Tax	Invoice Total
\$0.00	\$0.00	\$0.00	\$0.00

Invoice Items Invoice Parts Memo

Tax Exempt

+ Add Items Search By Site

S...	Item Code	Item Description	Qty	Rate	Ta...	Sales Tax	Amount	Item Cost	Total C...	Labor

0 items per page No items to display