

How to Create a Tax-Exempt Customer

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When a customer is Tax-exempt, there is a field in the New Customer setup to populate and activate the tax exception.

- The field Tax Exempt is used to enter the customer's tax-exempt number.
- Sedona Office will accept any character in this field, and it will activate tax exception.
- Sedona Office does not validate this tax-exempt number

The screenshot shows the 'Customer Setup 49706' window. At the top, the customer's name 'Miguel Gutierrez' and address '8904 Kiowa Dr, Greenville, TX 75402 - 2813' are displayed. Below this, the 'Setup Information' tab is active. The 'Tax Exempt #' field is highlighted with a red box and contains the text 'Example 123'. Other fields include 'Customer Status' (ANR), 'Customer Type' (Residential), 'Terms' (Net 30), 'Blanket P.O.' (empty), 'P.O. Expire Date' (empty), 'Customer Since' (10/11/2022), 'Chain Account' (empty), 'Customer Group' (MI), 'Customer Group 2' (empty), 'Branch' (MI), 'Invoice Group' (Oklahoma Tax), 'No Collections' (unchecked), and 'Part Pricing Level' (None). The 'Master Account Information' section includes 'Is Master Account' (checked), 'Account Index' (0), and 'Default New Sub-Accounts to Bill to Master Account' (checked). The 'Invoice Printing' section includes 'Print Statements' (checked), 'Print Site Info on Invoices' (checked), 'Separate Cycle Invoice for Each Site' (checked), and 'Charge Late Fees' (checked). The 'Critical Message' section has an 'Expires On' field (empty). The 'Save' and 'Close' buttons are at the bottom right.

Field	Value
Customer #	49706
Customer Name	Miguel Gutierrez
Additional Name	
Customer Status	ANR
Customer Type	Residential
Old Customer ID	
Terms	Net 30
Tax Exempt #	Example 123
EIN	
OK to Increase	
Salesperson	TestUser
Commission Pctg	0.00
Registration Code	80F470
Blanket P.O.	
P.O. Expire Date	
Customer Since	10/11/2022
Chain Account	
Customer Group	MI
Customer Group 2	
Branch	MI
Invoice Group	Oklahoma Tax
No Collections	☐
Part Pricing Level	None
Is Master Account	☒
Account Index	0 (For Auto Numbering)
Default New Sub-Accounts to Bill to Master Account	☒
Print Statements	☒
Print Site Info on Invoices	☒
Separate Cycle Invoice for Each Site	☒
Charge Late Fees	☒
Expires On	