

# How To Enable the Tax Exempt Box

12/05/2024 8:43 am EST

## Issue:

User unable to mark the Tax Exempt box. The box to mark items as Tax Exempt are all grayed out in Jobs and Service Tickets.

The screenshot shows a software window titled "Ticket #10401" with a "Central Station" tab. The interface includes a navigation bar with icons for Service Ticket, Prevailing Wage, Appointments and Labor, Billing, Documents (0), Equipment and Parts, Journal, Notes (0), Other Items, Purchase Orders (0), Service History, Ticket Log, and Ticket Group. Below the navigation bar is a "Go To" field and a "Legal" warning icon. The main area displays customer information: Customer 48960, Secure U, Site AS Test, 123 Test Lane, Pleasant Lake, MI 49272, Eastern Time. It also shows creation details: Created 11/27/2024 10:46 AM, Created By asim, Status Open. Below this is a "Customer Equipment Detail" table with columns for Part, Description, Qty, Location, Local Zone, Date, Type, Desc, Serial-Lot, Date, and Remove. The bottom section is a "Service Ticket Parts" table with columns for Warehouse, Part, Description, Location, Qty, Unit Price, Total Price, Est Tax, Exempt, Costing, and Serial-Lo. A single row is visible with Part "24TP part name", Description "24TP Invoice De...", Qty "1", Unit Price "35.0000", Total Price "35.00", Est Tax "0.00", and Costing "Standard". The "Exempt" checkbox in this row is highlighted with a red box and is currently unchecked. At the bottom right, there are "New" and "Save" buttons.

Customer Equipment Detail										
Customer Equipment Detail					Installed			Removal		
Part	Description	Qty	Location	Local Zone	Date	Type	Desc	Serial-Lot	Date	Remove

  

Service Ticket Parts										
Warehouse	Part	Description	Location	Qty	Unit Price	Total Price	Est Tax	Exempt	Costing	Serial-Lo
	24TP part name	24TP Invoice De...		1	35.0000	35.00	0.00	<input type="checkbox"/>	Standard	

## Resolution:

Being unable to mark the Exempt box in Service Tickets and Jobs is due to permission.

In SedonaSetup:

- Go to User Groups
- Locate the User Group of the User having the issue
- Scroll to the SedonaSetup permissions, they are indicated with the abbreviation of SS
- Locate the permission labeled Edit Item Tax Exemption

Application Access | Report Access

Access	Module
<input type="checkbox"/> Taxing Group	SS
<input type="checkbox"/> Tax Table	SS
<input checked="" type="checkbox"/> Edit Item Tax Exemption	SS
<input type="checkbox"/> Currency	SS
<input type="checkbox"/> Terms	SS
<input type="checkbox"/> Type of Customer	SS
<input type="checkbox"/> User Defined Table 1	SS
<input type="checkbox"/> User Defined Table 2	SS
<input type="checkbox"/> User Defined Table 3	SS
<input checked="" type="checkbox"/> Application Preferences	SS
<input type="checkbox"/> Accounts Payable	SS
<input checked="" type="checkbox"/> Accounts Receivable	SS
<input type="checkbox"/> Central Station Tracking Defaults	SS

Print      Apply    New    Delete

Application Access | Report Access

Access	Module
<input type="checkbox"/> Tax Table	SS
<input checked="" type="checkbox"/> Edit Item Tax Exemption	SS
<input type="checkbox"/> Currency	SS
<input type="checkbox"/> Terms	SS

- Mark the Box and click Apply to save the change
- Have the user log out and log back into SedonaOffice
- Have the user go back into the Service Ticket or Job they are trying to mark the Tax Exempt box
- The box will be live and can be marked

Service Ticket Parts

Warehouse	Part	Description	Location	Qty	Unit Price	Total Price	Est Tax	Exempt	Costing	Serial-Lo
	24TP part name	24TP Invoice De...		1	35.0000	35.00	0.00	<input checked="" type="checkbox"/>	Standard	

New    Save