

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. The 'Tax Exempt #' field is highlighted with a red box and contains the text 'Example123'. Other fields include Customer # (49706), Customer Name (Miguel Gutierrez), Customer Status (ANR), Customer Type (Residential), Terms (Net 30), and Invoice Group (Oklahoma Tax).

Field	Value
Customer #	49706
Customer Name	Miguel Gutierrez
Additional Name	
Customer Status	ANR
Customer Type	Residential
Old Customer ID	
Terms	Net 30
Tax Exempt #	Example123
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	<input type="checkbox"/>
Part Pricing Level	None

Master Account Information

- Is Master Account
- Account Index: 0 (For Auto Numbering)
- Default New Sub-Accounts to Bill to Master Account

Invoice Printing

- Print Statements
- Print Site Info on Invoices
- Separate Cycle Invoice for Each Site
- Charge Late Fees

Critical Message

Expires On: []

Buttons: Save, Close