

Qué hay de nuevo > ESP Quick Tips > ESP Quick Tip #25: Adding a Sales Tax Exempt Certificate to Company in CRM

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2021-12-16 - Jennifer M - ESP Quick Tips

You are able to add a sales tax exemption certificate for a company in CRM. After logging into the ESP, click on the CRM tab.

esp	ESP Web	Websites Adr	nin	CRM	Orders	Email Marketing
Companies	Contacts E	mails Notes	Tasks	Appointments	Designs	

After locating the company for which you would like to add a sales tax exempt certificate, take the following steps:

1. Click on the Company's name to open the record.

All Companies	Customers	Suppliers	Decorators	Prospects			
Q		×					I ^A By Name ▼
			Number of	Companies: 1			
А							
AB 800 info	C Promo Compa -54 6-1350 @abcpromo.com				4800 Street Rd Feasterville-Trevose PA, United States	19053	•

2. Click on the Pencil on the top right.



3. Click on the Billing Information link.

Tags



4. Check the "Tax Exempt" box to ensure no tax is charged when creating orders for this company. Then, click on the Add Tax Certificate link.

Ierms	Credit Limit	t Discour	nt	Pay With	
	▼ \$ 0.00	0.00	%		
Sales Tax					
Tax Exempt (Taxes	s will not be automatic	cally applied to orders)			
Sales Tax Exemption	1 Certificates				
Certificate *	State/Province	Reason	Effec	ective Until	
		No tax certificates four	nd.		
+ Add Tax Certificate	,				
Default Currency					
	~				
USD - US Dollar					
Add Shipping Account	t				
inter the approp	oriate informati	ion in the available	boxes.		
Sales Tax					
euloo lux	s will not be automatic	cally applied to orders)			
 Tax Exempt (Taxes) 	5 WIII HOL DE automatic				
 Tax Exempt (Taxes Sales Tax Exemption 	n Certificates				
 Tax Exempt (Taxes Sales Tax Exemption Certificate * 	n Certificates State/Province	e Reason	Effec	tive Until	

6. Scroll down and click on the Save button at the bottom when you are finished.