



ESP Quick Tip #25: Adding a Sales Tax Exempt Certificate to Company in CRM

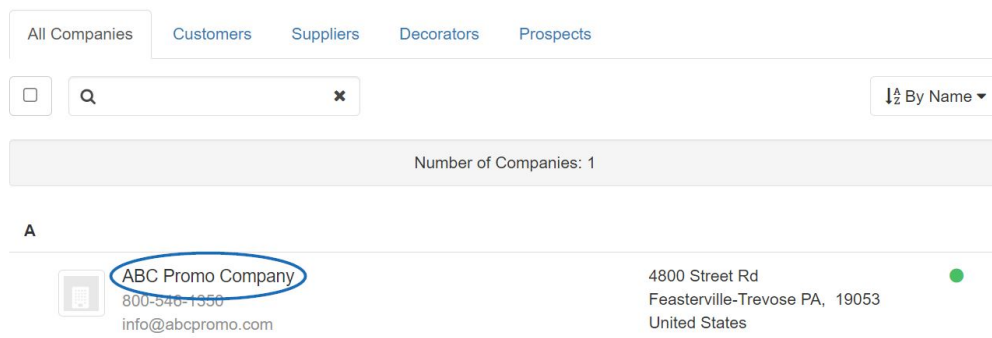
2021-12-16 - Jennifer M - ESP Quick Tips

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.



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.



2. Click on the Pencil on the top right.

CRM / Companies / ABC Promo Company



3. Click on the Billing Information link.

Tags

Enter or Choose Tag

Third Party System Name ID

Billing Information

Record Owner (Person responsible for this record)

ESP User (Me)

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.

[Billing Information](#)

| | | | |
|----------------------|--------------|----------|----------------------|
| Terms | Credit Limit | Discount | Pay With |
| <input type="text"/> | \$ 0.00 | 0.00 % | <input type="text"/> |

Sales Tax

- ☒ Tax Exempt (Taxes will not be automatically applied to orders)

Sales Tax Exemption Certificates

| Certificate * | State/Province | Reason | Effective Until |
|----------------------------|----------------|--------|-----------------|
| No tax certificates found. | | | |

[+ Add Tax Certificate](#)

Default Currency

USD - US Dollar


[Add Shipping Account](#)

5. Enter the appropriate information in the available boxes.

Sales Tax

- ☒ Tax Exempt (Taxes will not be automatically applied to orders)

Sales Tax Exemption Certificates

| Certificate * | State/Province | Reason | Effective Until |
|---------------|----------------|------------------------|--|
| NPO-123456 | PA | Nonprofit Organization | 04/30/2022   |

[+ Add Tax Certificate](#)

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