



Issuing Tax-Exempt Status

The Tax-Exempt POS (Point of Sale) button is locked to only allow Shift Leads and above access to issue tax-Exempt status to a customer. This functionality is only to be used when a customer has a valid tax-Exempt number and certificate to show as proof.

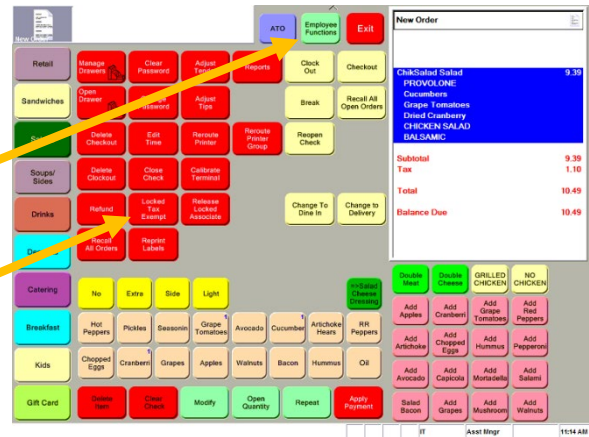
Proof of Tax-Exempt

Before following the steps to unlock the tax-Exempt POS button, you must get valid proof that a customer is tax-Exempt.

⇒ Obtain a copy of the Tax-Exempt Certificate or 501c(3) letter, make a copy and keep it on file for future use.

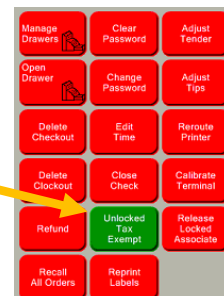
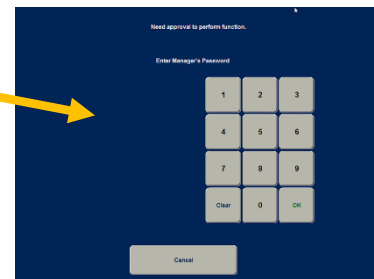
Locate the Tax-Exempt POS Button

1. Once an order has been rung into the POS, you will select the employee functions button located at the top of the screen.
2. The Locked Tax-Exempt button will be located in the red section



Unlocking the Tax-Exempt POS Button

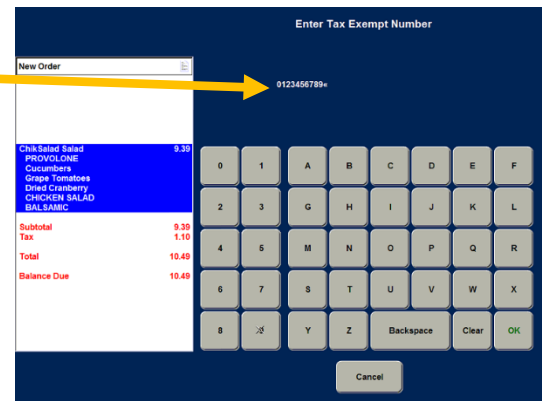
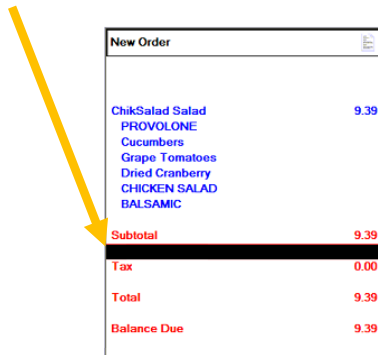
1. Once you have selected the Locked Tax-Exempt button, the POS will ask for Manager approval. Using Manager mag card, swipe to give access.
- ⇒ Only an employee who has Manager access can approve Tax-Exempt status for orders with proper documentation from the customer.
2. Once the manager mag card has been swiped, it will unlock the tax-Exempt button and the button will read Unlocked Tax-Exempt in green. Select Unlocked Tax-Exempt button.



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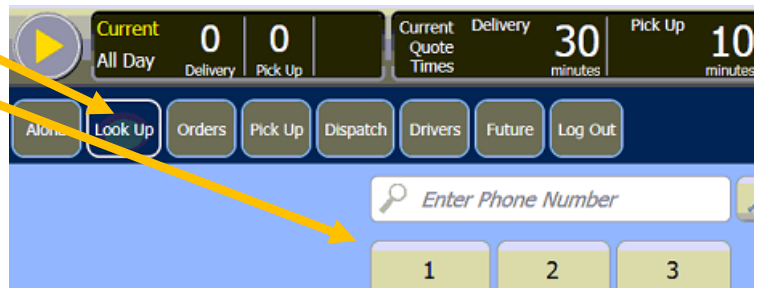
Unlocking the Tax-Exempt POS Button (continued)

3. A screen will open up where you will need to enter the Tax-Exempt ID Number from the Certificate/Document and then press OK.
 ⇒ Tax-Exempt numbers vary by state. These can include both letters and numbers.
4. Cross out the tax line, as it is not actually applied to the order or total.



Saving a Tax-Exempt ID Number to a Customer Profile

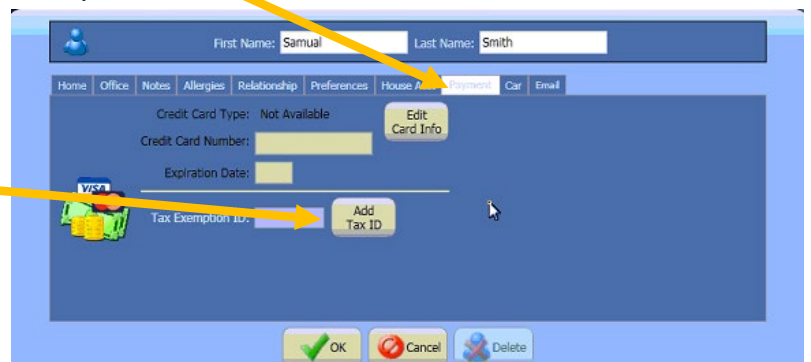
1. In the ATO screen, select the Look Up button.
2. Type in the customer's phone number or name.



3. In the lower right hand corner, you will either add the customer's information into ATO or select the Customer Details button to update existing information.



4. Once customer's information is entered, select the Payment Tab.
5. To access the Tax-Exempt ID spot, you will have to get Manager approval via their mag card as shown above in Unlocking the Tax-Exempt POS Button.



- Once Manager approval has been granted, you will type in the Tax-Exempt ID Number from the customer's Certificate of Tax-Exempt or 501c(3) letter.


First Name: Last Name:

Home Office Notes Allergies Relationship Preferences House Acct **Payments** Car Email

Credit Card Type: Not Available

Credit Card Number:

Expiration Date:

 Tax Exemption ID:

- Press OK to save the Tax-Exempt ID Number for that customer.