Using Tax Exemption

Tax Exemption Codes are supported in the OPS-COM system. If a user has a tax exemption code on their profile, taxes will not be charged when they purchase items such as permits, violations and lockers.

Quick Steps:

1. Search for and select the **User Profile**.
2. Under **Profile>Edit Profile Information**, add or update the **Tax Exemption Code** field on the **Edit User Profile** screen.
3. Click **Submit Profile Information** and then **Confirm Information Correct** buttons.
4. Verify the code is correct in the **Profile Overview** window.
5. Ensure tax-exempt transactions do not display taxes on the payment page.
6. Run and export the **Tax Exemption Report** from the **Payments** menu as needed.

Step by Step Instructions:

1. **Search for the User**:
   - Use the **Quick Search** or **User Search** functions to locate the user profile you want to edit.
2. **Edit the Profile**:
   - Open the **User Profile** and under **Edit Profile Information** locate the **Tax Exemption Code** field.
   - This field supports alphanumeric characters and is present on both new and existing profiles.
3. **View Tax Exemption Code**:
   - The **Tax Exemption Code** is displayed in the **Profile Overview **window for easy reference.
4. **Tax-Free Transactions**:
   - When purchasing a permit for a user with a tax exemption code, taxes will not appear as a line item on the payment or confirmation page.
5. **Tax Exemption Report**:
   - Generate the **Tax Exemption Report** from the **Payments** menu.
   - This report includes three fields: **First Name**, **Last Name**, and **Tax Exemption Code**.
   - You can copy or export the report records for further use.