# Using Tax Exemption

> The Tax Exemption feature allows administrators to apply specific exemption codes to user profiles, automatically waiving applicable taxes during the purchase of items such as permits, violations, and lockers. Its primary purpose is to ensure accurate billing for tax-exempt individuals or organizations and to simplify compliance with specific financial regulations. This article is intended for OperationsCommander (OPSCOM) administrators responsible for managing user profiles and accounting settings.

## Setup and Configuration

This feature does not require global system configuration but must be manually applied to eligible user profiles.

**Admin Side:** Administrators must locate the user profile and manually input the approved tax exemption code provided by the user or organization.

**User Side:** Users do not configure this setting themselves. Once a valid code is applied to their profile by an administrator, the system automatically waives taxes during their checkout process on the user portal.

## Using this Feature

Administrators can use the following instructions to apply tax exemption codes to a profile, verify their presence, and generate auditing reports.

## Adding or Updating a Tax Exemption Code

1. Locate the user you wish to modify using the administrative search tools.
2. Click the **Username** from the search results to access their *User Profile Overview*.
3. Click the **Edit** button on the Basic Profile Information bar, or click the **Profile** drop-down menu and choose **Edit Profile Information**.
4. Locate the **Tax Exemption Code** field on the Edit User Profile screen.
5. Enter or update the alphanumeric tax exemption code in this field.
6. Click the **Submit Profile Information** button.
7. Click the **Information Correct** button on the confirmation screen to save the changes to the user's profile.

## Verifying the Tax Exemption Code

The active tax exemption code is displayed directly in the Profile Overview window on the user's *User Profile Landing Page* for easy reference. This allows administrators to quickly verify its presence without having to enter edit mode.

> When a user with a valid tax exemption code on their profile proceeds to purchase items, applicable taxes will not appear as a line item on the payment or confirmation page. The system automatically waives these taxes at checkout.

## Generating the Tax Exemption Report

Administrators can generate a report to view all users with active tax exemption codes.

1. Hover over the main menu, click **Payments**, and choose **Tax Exemption Report**.
2. Review the generated list, which includes the user's First Name, Last Name, and Tax Exemption Code.
3. Use the available export or print functions to extract the report records for external auditing.

---

## Best Practices and Considerations

- **Ensure data accuracy: Ensure that tax exemption codes are accurately entered and validated against official documentation.** Verifying the exact code maintains financial compliance and prevents incorrect billing.
- **Establish internal verification protocols: Establish clear internal procedures for verifying a user's eligibility for tax exemption before entering a code on their profile.**
- **Audit records frequently: Regularly run and review the Tax Exemption Report for auditing purposes.** Routine checks ensure that all tax-exempt transactions happening on your platform are correctly accounted for and supported by your organization.
- **Communicate policies clearly: Clearly communicate your organization's tax exemption policies to eligible users.** Ensure they understand how to submit their proof of exemption to administrators so it can be added to their profile before they attempt to make a purchase.

---



Revision #6
Created 30 April 2024 08:30:19
Updated 14 July 2026 13:50:28