



# Editing Tax Rates and Service Fees

2019 - Spring Edition

## User Guide - Table of Contents

[Overview](#)

[Use Case\(s\)](#)

[Accessing the Tool](#)

[Tax Rates](#)

[Edit Tax Rates](#)

[Service Fees](#)

[Best Practices](#)

## Overview

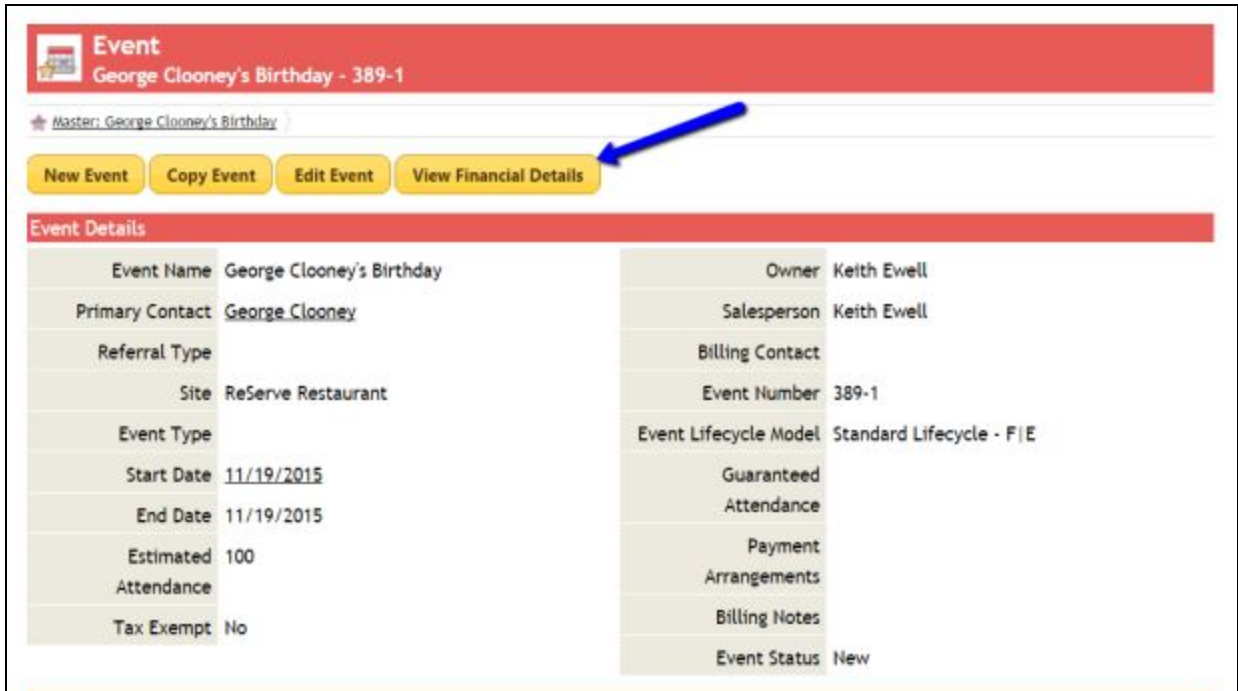
Do you sometimes find that you need to change up a tax rate or service charge for one event, but not make permanent changes to your tax rates or service fees? Or perhaps you forgot to flag an event as tax exempt? It's an easy fix when you go to your **View Financial Details** page within the Event.

## Use Case(s)

- Changing a tax rate or service charge for one event, but not make permanent changes to your tax rates or service fees.
- Forgetting to flag an event as Tax Exempt.

## Accessing the Tool

Access the **View Financial Details** page within the Event.




The screenshot displays the 'View Financial Details' page for an event. At the top, there is a red banner with the event name 'George Clooney's Birthday - 389-1'. Below this, there is a navigation bar with buttons for 'New Event', 'Copy Event', 'Edit Event', and 'View Financial Details'. A blue arrow points to the 'View Financial Details' button. The main content area is titled 'Event Details' and contains a table of event information.

Event Name	George Clooney's Birthday	Owner	Keith Ewell
Primary Contact	George Clooney	Salesperson	Keith Ewell
Referral Type		Billing Contact	
Site	ReServe Restaurant	Event Number	389-1
Event Type		Event Lifecycle Model	Standard Lifecycle - FIE
Start Date	11/19/2015	Guaranteed Attendance	
End Date	11/19/2015	Payment Arrangements	
Estimated Attendance	100	Billing Notes	
Tax Exempt	No	Event Status	New

## Tax Rates

Scroll down to the red banner that labeled **Tax Rates**. Click the button that says **Edit Rates** beneath the Tax Rates banner.

Tax Rates					
<b>Edit Rates</b> 					
Tax Exempt <input type="checkbox"/> No					
Revenue Center Tax Rates				Sales Tax	Liquor Tax
Food				8.5000 %	0.0000 %
Beverage: Alcoholic				8.5500 %	0.0000 %
Beverage: Non Alcoholic				8.5500 %	0.0000 %
Equipment				8.5000 %	0.0000 %
Labor				8.5000 %	0.0000 %
Room Rental				8.5000 %	0.0000 %
Rentals				0.0000 %	0.0000 %
Parking				0.0000 %	0.0000 %
Florals				0.0000 %	0.0000 %
Linens				0.0000 %	0.0000 %
Security				0.0000 %	0.0000 %
Golf				0.0000 %	0.0000 %
Miscellaneous				0.0000 %	0.0000 %
Additional Gratuity				0.0000 %	0.0000 %
Food Equipment				0.0000 %	0.0000 %
Service Fee Tax Rates	Fee Is Taxable	Use Rev Ctr Rates	Use Fee Tax Rates	Sales Tax	Liquor Tax
Service Charge	Yes	Yes	No	N/A	N/A
Non-Member Service	No	No	No	N/A	N/A

If the event should be tax exempt, you will simply flag the tax exempt box, **save** and all taxes will be removed.

## Edit Tax Rates

To edit the tax rates, find the revenue center you want to change and enter in a percentage amount.

Existing percentage amounts can be removed by replacing them with 0.0000%. Tax rates that should be applied to the service charges can also be edited while editing tax rates.

**Tax Exempt**

Tax Exempt

**Revenue Center Tax Rates**

Revenue Center	Sales Tax	Liquor Tax
Food	8.5000 %	0.0000 %
Beverage: Alcoholic	0.0000 %	8.5500 %
Beverage: Non Alcoholic	8.5500 %	0.0000 %
Equipment	8.5000 %	0.0000 %
Labor	8.5000 %	0.0000 %
Room Rental	0.0000 %	0.0000 %
Rentals	0.0000 %	0.0000 %
Parking	0.0000 %	0.0000 %
Florals	0.0000 %	0.0000 %
Linens	0.0000 %	0.0000 %
Security	0.0000 %	0.0000 %
Golf	0.0000 %	0.0000 %
Miscellaneous	0.0000 %	0.0000 %
Additional Gratuity	0.0000 %	0.0000 %
Food Equipment	0.0000 %	0.0000 %

**Service Fee Tax Rates**

Service Fee Name	Fee Is Taxable	Use Rev Ctr Rates	Use Fee Tax Rates	Sales Tax	Liquor Tax
Service Charge	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	N/A	N/A
Non-Member Service Charge	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A
Member Service Charge	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A
Gratuity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A

Save
Cancel

## Service Fees

Service Charge rates can be edited after the event has been created. Scroll further down the page and click on **Edit Rates**.

**Service Fee Rates**

Edit Rates

Service Fee Rates	Rate (%)
Gratuity	0.0000 %
Service Charge	20.0000 %

To edit the service fee rates, find the fee you want to change and enter in a **percentage amount**. You can also remove an existing percentage amount by replacing it with 0.0000.

**Edit Service Fee Rates**  
George Clooney's Birthday - 389-1

**Service Fee Rates**

Service Fee Rates	Rate (%)
Gratuity	0.0000 %
Service Charge	18.0000 %

**Please Note:** Keep in mind that editing the tax rates and service fee rates of an event only applies to that individual event and does NOT edit the rates of the entire organization.

## Best Practices

- Editing the tax rates and service fee rates of an event only applies to that individual event and does NOT edit the rates of the entire organization.