

## Customer Filing Process

When your local municipality has added a filing to your property, you will see it the way it is displayed below. Click “File” to begin the process.

**Account Information**

**Account:** 1252

**Owner:** Jeff Lawson

**Contact:** Jeff Lawson

**Cell:**

**Phone:**

**Email:** [redacted]@gmail.com

**Information**

Use the Link button to connect your tax and business records to your customer account.

**Getting Started**

Link Existing Records

**Linked Records**

PIDN	Type	Status	Total	Credit	Location	Mailing Name
B6	<a href="#">File</a> Bus Lic	Active	0.00	0.00		Test Company Lic
U30	Utility	Active	0.00	0.00		Star Utility

Showing 1 to 2 of 2 entries

Clicking File will navigate you to the Filing Hub. This screen will display not only any outstanding filings, but also any filing history.

To enter your filing click “Start” as shown below.

[Go Back To Customer Landing Page](#)

**Filing Hub**

PIDN: B6  
Jeff Lawson

**Outstanding Filings**

If you wish to proceed with the filing click the "Start" link. If you wish to do an extension, click the "Extension" link. These links will only show if you have an outstanding filing.

Excel

Search:

Tax Year	Filing Code	Date Due	Type
2024	Bus Lic	<a href="#">Start</a> 02/06/2024	Standard <a href="#">Extension</a>

Showing 1 to 1 of 1 entries

**Filing History**

In order to view each filing's details click on the view/edit icon on the far right of each record.

Excel

Search:

Tax Year	Filing Code	Date Due	Type Of Filing	Extension Date	Status
No data available in table					

Showing 0 to 0 of 0 entries

This screen is where you will enter the filing line items. In our example the line item is “Lodge” but could be a different word depending on your municipality. You can also upload documents if needed by clicking Uploads then click within the box and upload the files.

To start this step click “Enter Line Item Info”.

Filing Line Items

Enter Line Item Info

Search:

Filing Order	Line Item	Gross Earned	Deductions	Taxable Adjustment	Taxable Basis	Calculated Total	Pre Payments	Estimated Payment	Penalty	Interest	Final Charge
0	AirBED	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0	Lodge	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Totals:			0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Showing 1 to 2 of 2 entries

Resulting Charges

filing related

No charges have been calculated for this filing yet. Finalize the line items by clicking on the 'Enter Line Item Info' button above.

Make a payment

Enter the data that corresponds to the line header. Remember, where our column says “Total Sales” yours could say something different like “Gross Earn”, “Gross”, etc.

Click into the 0.00 to enter data. When you are finished TAB through to enter your changes. You will see that your net amount will change if you enter any deductions, and the calculated total will automatically change.

In my example below I entered 10,000 into the Total Sales, and 1,000 in the deduction. The Net calculated automatically and my final charge was displayed in the last column.

You should fill out the total sales and the deduction fields.

Search:

Line Item	Description	Total Sales	Deduction	Net	Calculated Total	Pre Payments	Estimated Payment	Penalty	Interest	Final Charge
Lodge	Lodging Tax	10,000.00	1,000.00	9,000.00	450.00	0.00	0.00	0.00	0.00	.450
AirBED	Air bed	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Showing 1 to 2 of 2 entries

Save Changes

Finalize Filing

Process Zero Filing

If you need to step away from the process, or check your numbers and come back, click Save Changes and your work will be saved and not processed.

If you are doing a zero filing, click “Process Zero Filing”.

When you have finished entering your information, click “Finalize Filing”.

You will be taken back to the previous page where you will see the data you entered under the Filing Line Items bar. If the data is wrong, simply click Reset Filing and enter it correctly.

You will also see a resulting charge added to the bottom of the page. If you wish to make a payment from here, that option is given, but you can always find your way back here from your account dashboard.

Filing Line Items

Reset Filing

Search:

Filing Order	Line Item	Gross Earned	Deductions	Taxable Adjustment	Taxable Basis	Calculated Total	Pre Payments	Estimated Payment	Penalty	Interest	Final Charge
1	Lodge	10,000.00	1,000.00	0.00	9,000.00	450.00	0.00	0.00	0.00	0.00	450.00
2	AirBED	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Totals:			10,000.00	1,000.00	0.00	9,000.00	450.00	0.00	0.00	0.00	450.00

Showing 1 to 2 of 2 entries

Resulting Charges

filing related

Description	Status	Gross	Exclusions	Net	Adjustment	Normal	Discount	Penalty	Interest	Due	Payment	Check Number	Date Paid	Date Filed
Lodging Tax	Pending	9000.00	0.00	9000.00	0.00	450.00	0.00	0.00	450.00	0.00		01/01/0001	01/01/0001	

Make a payment