

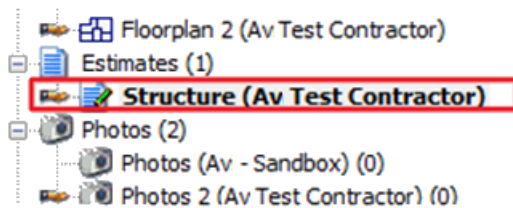
Job Aid - Applying Tax with O&P

There are situations where you will apply tax before or after overhead and profit in your claims. This can be determined by one checkbox inside your claim.

How to make an O&P tax selection

The option for taxing O&P can be located inside your estimate.

1. Select your estimate in the Claim Explorer.



2. Select the Totals page at the bottom of your estimate.



3. You will see here if any O&P is entered.

Add 0.00% overhead:

Add 0.00% profit:

Estimate Subtotal:

4. You can edit the O&P and its tax selections by clicking on either overhead and profit, the tax information, or the Configure Totals Page Layout.

ESTIMATE: Structure (Av Test Contractor)
In progress ▼

[Configure Totals Page Layout](#)

Total Materials:
Total Labor:
Total Equipment:
Total Market Conditions:
Subtotal:

HST 13.000% (applies to materials, labor, equipment and market conditions):
Subtotal:

Add 0.00% overhead:
Add 0.00% profit:
Estimate Subtotal:

5. You can edit the O&P here.

Estimate Totals Page Layout - Structure

Flat Deductible Coverages Depreciation Finalization
General Pricing Discounts Minimum Charges

Overhead and Profit

Overhead: 0.00
Profit: 0.00% ☐ Cumulative

Calculate on: ☒ Total Cost ☐ ACV

Taxes

Name	Rate	Mat	Lab	Equ	M.Cond	O&P
<input checked="" type="checkbox"/> HST	13.000%	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	0.000%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	0.000%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

6. You will find the option to apply O&P to the taxes here. There are two options for this box.
 - a. Un-Checked – Apply the tax on the claim, and then apply O&P.
 - b. Checked – Apply O&P to the claim, and then apply the taxes.

Estimate Totals Page Layout - Structure

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Overhead and Profit

Overhead: 0.00
Profit: 0.00% ☐ Cumulative

Calculate on: ☒ Total Cost ☐ ACV

Taxes

Name	Rate	Mat	Lab	Equ	M.Cond	O&P
<input checked="" type="checkbox"/> HST	13.000%	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	0.000%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	0.000%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>