



# Job Aid

## Option to Apply Overhead and Profit to Taxes Claims Connect

**Version 7.3**

Issue 1  
April 3<sup>rd</sup>, 2024

# Option to Apply Overhead and Profit to Taxes

This job aid will guide a User on the steps to apply overhead and profit to taxes at the claim level and/or at the estimate level in Claims Connect. This only applies to taxes that are not set to be applied to overhead and profit.

The following tasks are described in this document:

- Configuring the Option to Apply Overhead and Profit to taxes at the Claim level
- Configuring the Option to Apply Overhead and Profit to taxes at the Estimate level

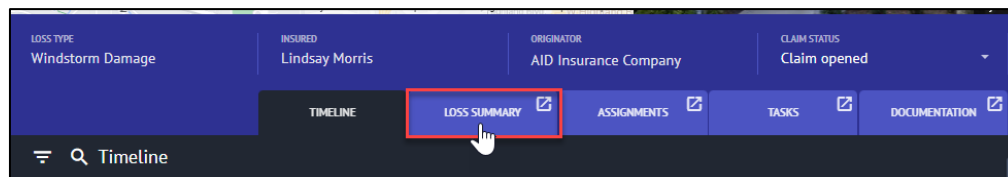
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**Note:** This document was created using a demo insurance company with generic settings. Keep in mind that your screens may appear slightly different. Please refer to your specific carrier guidelines for proper claim and estimate settings.

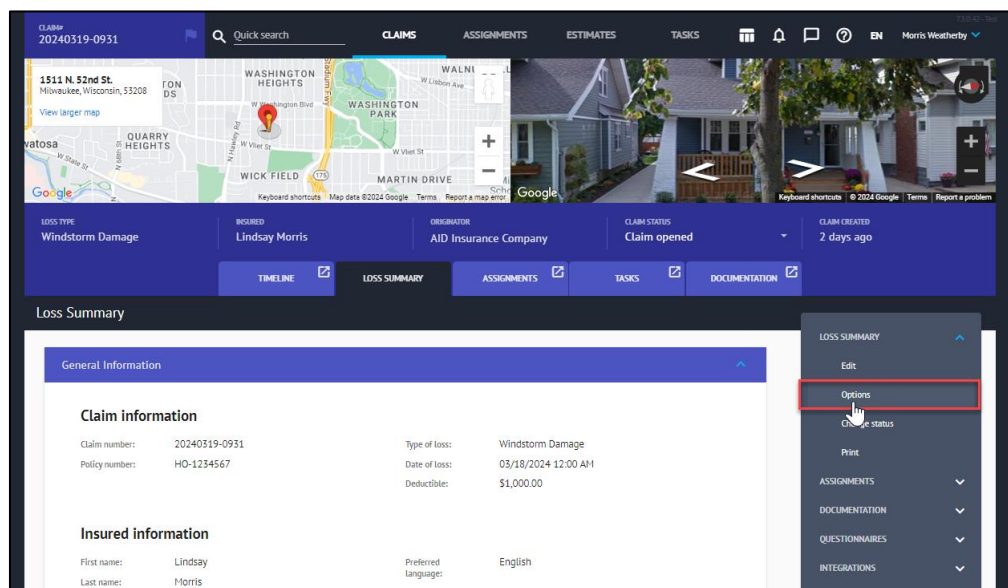
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## Configuring the option to Apply Overhead and Profit to Taxes at the Claim level

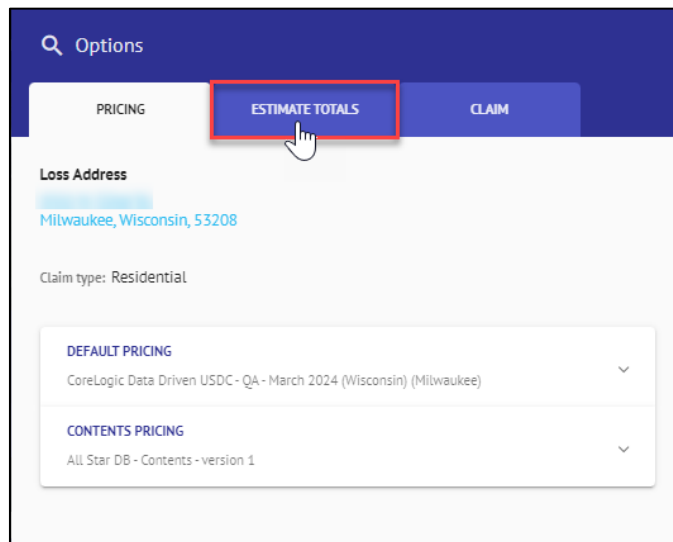
1. Within a claim, navigate to the **Loss Summary** page.



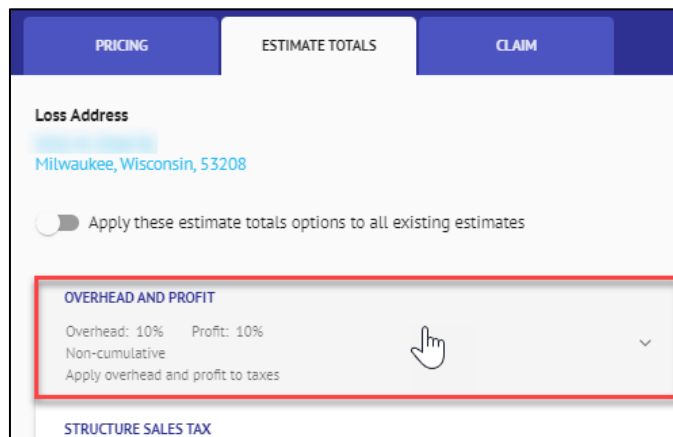
2. From the Loss Summary page, click **Options** from the Loss Summary section of the quick action menu.



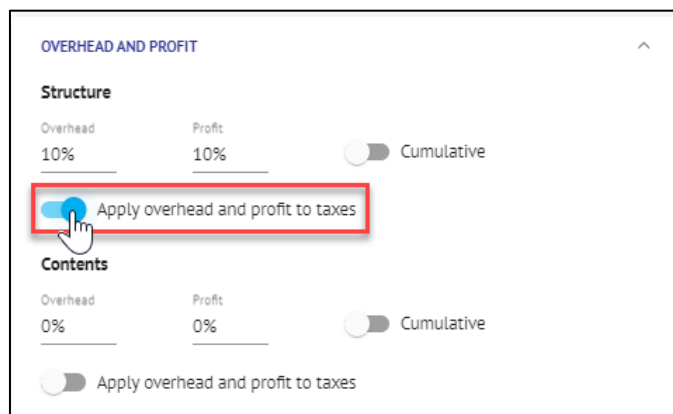
3. Select **Estimate Totals** to open the Estimate Totals tab from the Options blade.



4. Click anywhere on the **Overhead and Profit** drawer to expand it open.



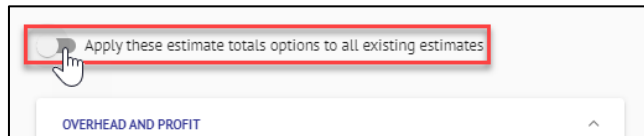
5. Toggle the switch to enable **Apply overhead and profit to taxes** for the claim.



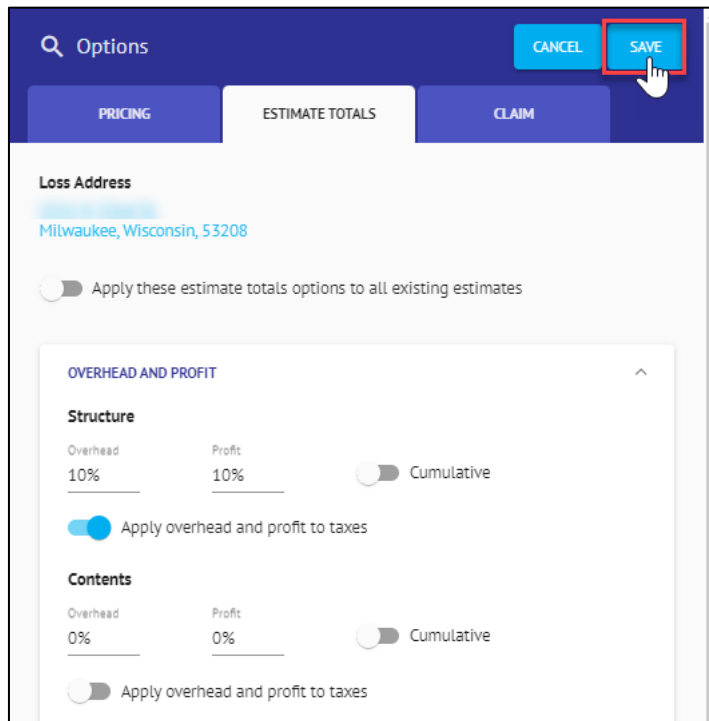
**Note:** It is possible that depending on company-configured default settings, this toggle may already be switched ON. Toggling the switch in this scenario will turn the setting off for the claim.

The Contents section will only appear if a company has Contents Estimating enabled.

6. To apply this setting to all newly created and existing estimates, toggle the **Apply these estimate totals options to all existing estimates** switch.

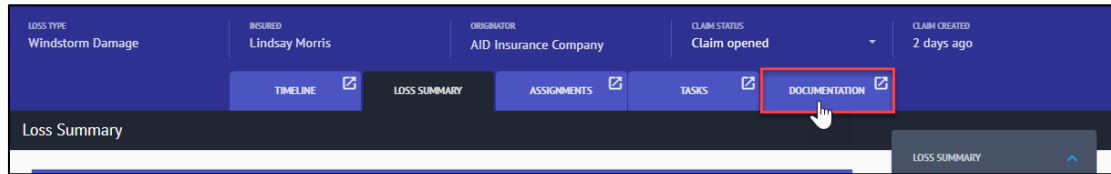


7. Click **Save** to close the blade and save the settings changes.

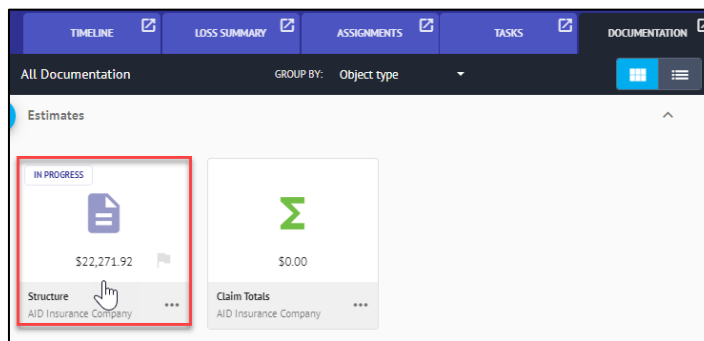


## Configuring the option to Apply Overhead and Profit to Taxes at the Estimate level

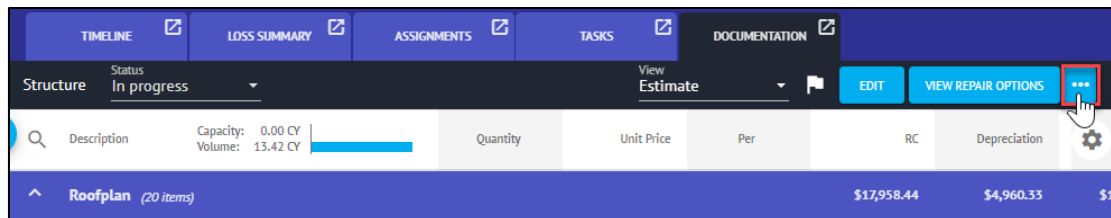
1. Navigate to the **Documentation** page.



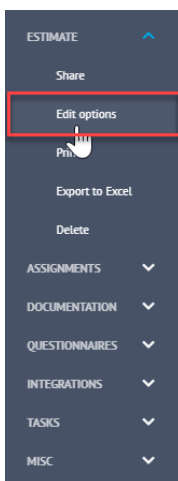
2. Select the estimate to open by clicking anywhere on the estimate card.



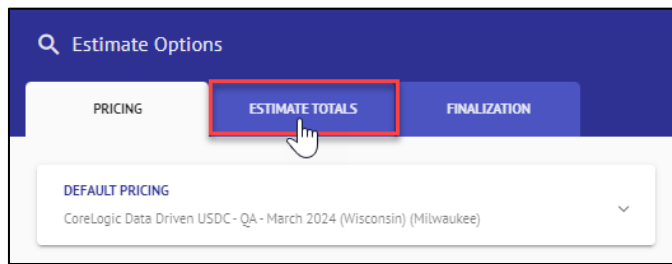
3. Once the estimate is open, click the **Ellipsis** button in the top right.



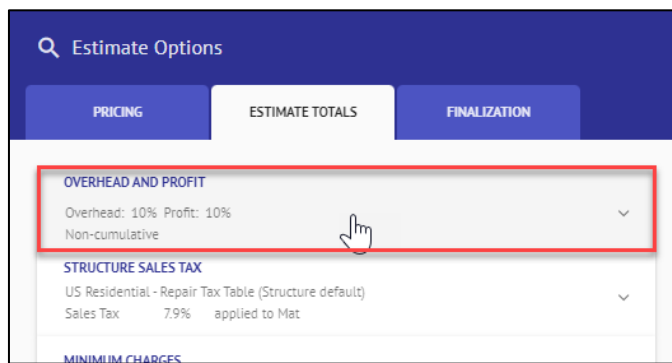
4. Select **Edit Options** from the ellipsis menu.



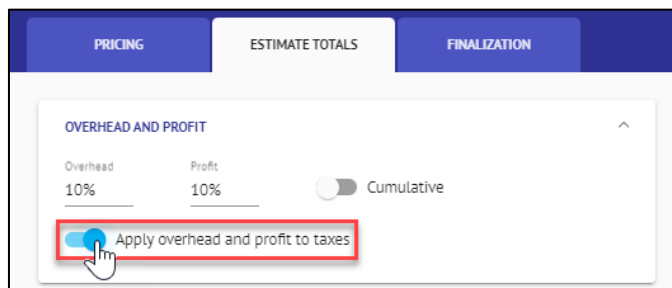
5. From the Estimate Options, open the **Estimate Totals** tab.



6. Click anywhere on the **Overhead and Profit** drawer to expand it open.



7. Toggle the switch to enable **Apply overhead and profit to taxes** for the estimate.



**Note:** It is possible that depending on company-configured default settings, this toggle may already be switched ON. Toggling the switch in this scenario will turn the setting off for the estimate.

8. Click **Save** to close the blade and save the changes to the settings.

The screenshot shows a software interface for 'Estimate Options'. At the top, there is a search icon and the title 'Estimate Options'. To the right of the title are two buttons: 'CANCEL' and 'SAVE'. The 'SAVE' button is highlighted with a red rectangle and a mouse cursor is clicking on it. Below the title bar, there are three tabs: 'PRICING', 'ESTIMATE TOTALS', and 'FINALIZATION'. The 'ESTIMATE TOTALS' tab is currently selected. Under this tab, there is a section titled 'OVERHEAD AND PROFIT' with a collapse icon (an upward arrow) to its right. Inside this section, there are two input fields: 'Overhead' with a value of '10%' and 'Profit' with a value of '10%'. To the right of these fields is a toggle switch labeled 'Cumulative', which is currently turned off. Below the input fields, there is a blue toggle switch labeled 'Apply overhead and profit to taxes', which is currently turned on. At the bottom of the 'ESTIMATE TOTALS' section, there is a link labeled 'STRUCTURE SALES TAX'.



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