



# Job Aid

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

**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 through the steps to apply overhead and profit to taxes at the claim level and/or at the estimate level in Mobile Claims. 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 from the Loss Summary screen, click **Configure claim options** from the General tab.

The screenshot displays the 'Claim Explorer' application window. On the left, a tree view shows the claim hierarchy, with 'Loss Summary' selected. The main area is divided into two panes. The left pane, titled 'CLAIM NO.: 20240319-0931', contains fields for 'Policy No.: HO-1234567', 'Type of loss: Windstorm Damage', 'Date of loss: 03/18/2024', 'Time of loss: 12:00 AM', 'Deductible: Fixed', 'Year built:', 'CAT No.:', 'Adjuster: Morris Weatherby (AID Ins.)', 'Phone:', and 'Email:'. Below these fields is a blue button labeled 'Configure claim options', which is highlighted by a red arrow. The right pane, titled 'INSURED', contains fields for 'Business name:', 'Title:', 'First name: Lindsay', 'Last name: Morris', '2nd First name:', '2nd Last name:', 'Address:', 'City: Milwaukee', 'Prov./State: Wisconsin', 'Postal/Zip code: 53208', 'Contact name:', 'Phone:', and 'Email:'. At the bottom of the window, a tab bar shows 'General' selected, with other tabs like 'Reports', 'Claim Type/Pricing', 'Policy', 'Map and Directions', and 'Custom Fields' visible.

2. From the General tab of the Default Estimate Totals Page Layout, go to the **Overhead and Profit** section.

Default Estimate Totals Page Layout

General Waste Minimum Charges Depreciation ☐ Apply to all existing estimates

**OVERHEAD AND PROFIT**

Structure		Contents	
Overhead:	10.00%	Overhead:	0.00%
Profit:	10.00%	Profit:	0.00%
Cumulative:	<input type="checkbox"/>	Cumulative:	<input type="checkbox"/>
Apply overhead and profit to taxes:	<input checked="" type="checkbox"/>	Apply overhead and profit to taxes:	<input type="checkbox"/>

**STRUCTURE SALES TAX** [Linkup Taxes by address](#)

US Residential - Repair Tax Table (Structure default) Uploaded: 11/11/2022 1:12 PM

Name	Rate	Mat	Lab	Equ	M.Cond	O&P
<input checked="" type="checkbox"/> Sales Tax	7.0000%	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	0.0000%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	0.0000%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	0.0000%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

☐ Cumulative taxes

**CONTENTS SALES TAX** ☐ Same as structure [Linkup Taxes by address](#)

3. Check the box next to **Apply overhead and profit to taxes**. This will apply the setting to all newly created estimates.

**OVERHEAD AND PROFIT**

Structure		Contents	
Overhead:	10.00%	Overhead:	0.00%
Profit:	10.00%	Profit:	0.00%
Cumulative:	<input type="checkbox"/>	Cumulative:	<input type="checkbox"/>
Apply overhead and profit to taxes:	<input checked="" type="checkbox"/>	Apply overhead and profit to taxes:	<input type="checkbox"/>

**Note:** It is possible that depending on company-configured default settings, this box may appear checked already upon opening. Unchecking the box will turn the setting off for the claim.

The column with Contents estimate options will only appear if a company has Contents Estimating enabled.

4. To apply this setting to all newly created and existing estimates, check the box next to **Apply to all existing estimates**.

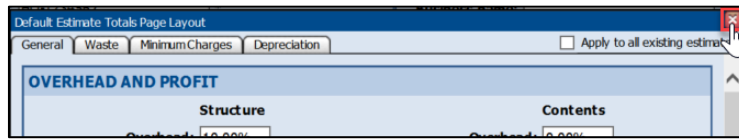
Default Estimate Totals Page Layout

General Waste Minimum Charges Depreciation ☒ Apply to all existing estimates

**OVERHEAD AND PROFIT**

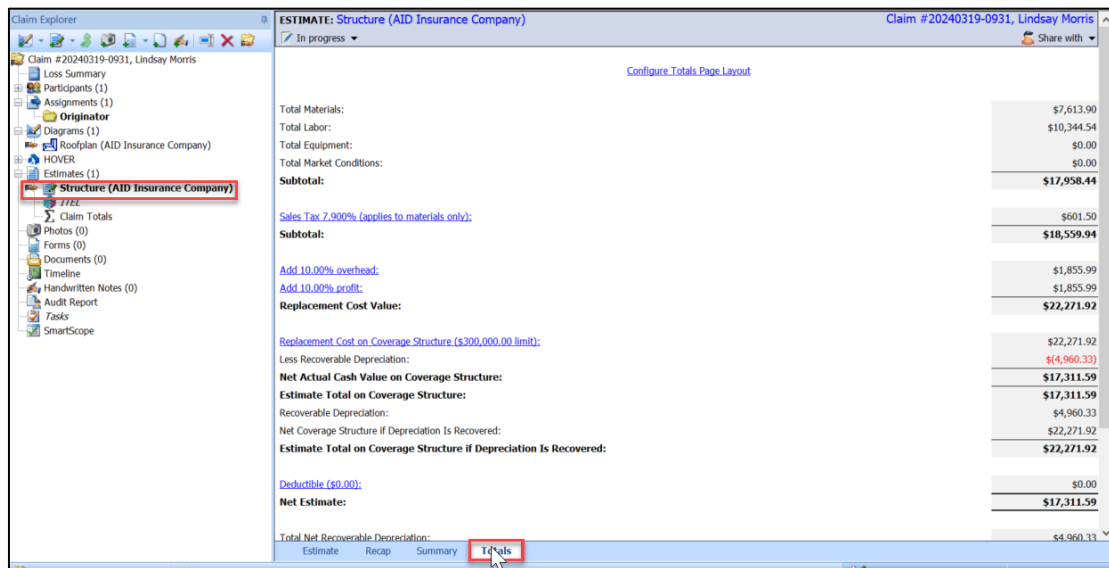
Structure		Contents	
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5. Click the red **X** to close the box and save the settings changes.



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

1. Navigate to the Estimate **Totals** page.



2. Click on **Configure Totals Page Layout**.



- From the General tab of the Totals Page Layout dialog box, go to the **Overhead and Profit** section.

Estimate Totals Page Layout - Structure

Deductibles: General (selected), Pricing, Depreciation: Discounts, Minimum Charges, Finalization: Coverages

**Overhead and Profit**

Overhead: 10.00%  
Profit: 10.00%  
☐ Cumulative  
☐ Apply overhead and profit to taxes

**Structure Sales Tax** [Lookup taxes by address](#)

US Residential - Repair Tax Table (Structure default)  
Uploaded: 11/11/2022 1:12 PM

Name	Rate	Mat	Lab	Equ	M.Cond	O&P
<input checked="" type="checkbox"/> Sales Tax	7.900%	<input checked="" 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"/>
<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"/>

☐ Cumulative Taxes

OK Cancel

- Check the box next to **Apply overhead and profit to taxes** to turn this setting on.

General (selected), Pricing, Discounts, Minimum Charges, Coverages

**Overhead and Profit**

Overhead: 10.00%  
Profit: 10.00%  
☐ Cumulative  
☒ Apply overhead and profit to taxes

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**Note:** It is possible that depending on company-configured default settings, this box may appear checked already upon opening. Unchecking the box will turn the setting off for the estimate.

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5. Click **OK** to save the updated settings.

Estimate Totals Page Layout - Structure

Deductibles      Depreciation      Finalization  
General    Pricing    Discounts    Minimum Charges    Coverages

**Overhead and Profit**

Overhead: 10.00%    ☐ Cumulative  
Profit: 10.00%  
☒ Apply overhead and profit to taxes

**Structure Sales Tax**    [Lookup taxes by address](#)

US Residential - Repair Tax Table (Structure default)  
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Name	Rate	Mat	Lab	Equ	M.Cond	O&P
<input checked="" type="checkbox"/> Sales Tax	7.900%	<input checked="" 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"/>
<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"/>

☐ Cumulative Taxes

OK    Cancel



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