

User ID

Password

User ID:

Password:

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- Do not use:
- Business class
- Related Type
- Related PIN
- Roll Type
- Area
- Id type
- Id
- Document Number

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Home Asmt Admin Tax Cashiering Records Info Center Business Revenue Reports and Interfaces Configuration

Search for a Business Search New Clear Close

Basic Search Information

Business/Trade name	<input type="text"/>	Owner name	<input type="text"/>
Organization type	Any	Area	Any
Business account	<input type="text"/>	Id type	Any
Business class	Any	Id	<input type="text"/>
License number	<input type="text"/>	Document Number	<input type="text"/>
Location number	<input type="text"/>	Trust Tax Acct number	<input type="text"/>
Bill Type		Communication type	Any
Bill Number	<input type="text"/>	Communication number	<input type="text"/>
Related Type			
Related PIN	<input type="text"/>		
Roll Type	Any		

Address Information Address Types: Situs Address

Street number	0	Suffix	<input type="text"/>
Pre-directional		Street name	<input type="text"/>
Street types		Post-directional	
City	<input type="text"/>	State	
Postal code	<input type="text"/>		

Search Results Result Types: Business Accounts

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- Do not use
- Incorporation Date
- Non-Profit Type
- Non-Profit apply date
- Employee count
- website
- Revenue account number
- Primary bus type
- Class
- Tag

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Notes Save List Close

Maintain a Business

Common Actions

- Business Contacts
- Additional Business Information
- Business Fees
- Business Account Flags
- Decals and Stamps
- Business Detail
- Business Detail (new)

Audit in progress

Business name: TEST ACCOUNTS [Edit](#) Business account number: 0000005

*Organization type: Sole Proprietorship Revenue account number: 0455787

Owners				Locations			
Owner Name	% Ownership	Primary	Add	Number	Trade Name	Situs Address	
SANDZIMIER GREG F	100.00%	<input checked="" type="checkbox"/>	Edit Remove	000	SANDZIMIER GREG F	27517 STROMBERG CT HAYWARD, CA 94545 0000	License Tr
				001	INFINITUS DESIGNS	64 BELLE VUE AVE OAKLAND, CA 94611	License Tr

Trade Names	
Trade Name	Add
INFINITUS DESIGNS	Edit Remove
SANDZIMIER GREG F	Edit Remove

Id Numbers			
Type	Id Number	Primary	Add
Federal Identification Number	12-3456789	<input checked="" type="checkbox"/>	Edit Remove

Mailing Addresses			
Address	Type	Effective Dates	Add
PO BOX 1155 SAN FRANCISCO, CA 99999	<input type="text"/>	0101-1231	Edit Remove

Primary business type: Various - Various

Class: GENERAL

TAG: TAG

Date in business: 2/1/2011

Incorporation date:

Date out-of-business:

Reason:

Non-profit Type:

Non-profit apply date:

Status: Active

Employee count: 0

Web site:

Combined Filer:

Member of Filer:

Membership Begin Date:

Membership End Date:

<
>

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Notes View Print Close

Notes Apply Filter

Begin

End

Filter By Author

- Keywords
- Account Details
- Accounting Unit
- Audit
- Bankruptcy

Keyword matching method:

Notes Add Note

<input type="checkbox"/>	Note Info	Keywords	Note Text		
<input type="checkbox"/>	Effective Date: 8/2/2022				
<input type="checkbox"/>	Attached To: Business Acct		TEST	Edit	Delete
	Author: jpene				

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- Do not use
- Primary Business Type
- Unit Type
- Number of units
- Area
- Zoning
- TAG
- Consolidated returns

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Maintain Business Location
Notes Save Finish Cancel

Business name: **TEST ACCOUNTS** Business account number: **0000005**

Situs Address Select | [Edit](#)

27517 STROMBERG CT
HAYWARD, CA 94545 0000

LIN: 0000005-00-000

Location number:

Primary business type: Various - Various [Look Up](#)

Date in operation:

Date out-of-operation:

Reason:

Discovery date:

Unit type:

Number of units:

Area:

Zoning:

TAG:

Consolidated returns:

Trade Names

Trade Name	Primary		
SANDZIMIER, GREG F	<input checked="" type="checkbox"/>		Edit Remove

Communications

Type	Number/Address		
Phone	4155547353		Edit Remove
E-mail Address	tx.pm@sfgov.org		Edit Remove

Mailing Addresses

Address	Type	Effective Dates	
PO BOX 1155 SAN FRANCISCO, CA 99999	Default	0101-1231	Edit Remove

View License Summary New Return



Business name: TEST ACCOUNTS Business account: 0000005
 Trade name: SANDZIMIER GREG F Location Address: 27517 STROMBERG CT, HAYWARD, CA 94545 0000

Year License Status

										Business Types <input type="text" value="All"/>		
Year	License #	Sup	Status	Type	Amt/Units	Int/Pen	Fee	Type Total	License Total	Paid	Due	
2023	20131172011	0	Active	RG FEE 2023 A	80,000			54.00				
		0				21.60	59.00		54.00	0.00	134.60	
	20231212553	0	Active	RG FEE 2023 A	80,000			54.00				
		0				21.60	59.00		54.00	0.00	134.60	
License Totals:						43.20	118.00	108.00	108.00	0.00	269.20	

- Do not use
- Notes tab
- Pay tab
- Supplement drop down field
- Managed By
- Document number
- Issue count
- Issue date
- Audit date
- Print Renewal
- Print Delinquent Notice
- View Credits hyperlink
- View Fees hyperlink
- Override check box
- Detail check box
- Second Override check box

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Maintain Business License Notes Pay Correct New Save Return

Common Actions

- Set Up Business Types
- Roll Business License
- Manage License Flags
- Manage Tax Bill Flags
- View Correction History
- Transaction History
- Additional Business License Information
- Business Detail
- Business Detail (new)

Active Tasks

Home

Business name: TEST ACCOUNTS Business account: 0000005

Trade name: SANDZIMIER GREG F Location Address: 27517 STROMBERG CT, HAYWARD, CA 94545 0000

License Revenue Object Data and Navigation

Year: 2023 Origination date: 2/1/2011

License number: 20131172011 Bill number: 2123058188

Supplement: 0 Roll type: Business Tax Reg

*License Owner: SANDZIMIER GRE Reason: New License

Managed By:

Tax Bill Charge Totals

Billing date: 5/1/2022

Tax: 54.00

Credits: 0.00 [View Credits](#)

Fees: 59.00 [View Fees](#)

Penalty: 13.50 Override Detail

Interest: 8.10 Override

Payments: 0.00

Surplus: 0.00

Total due: 134.60

Current Year

Document Number: Issue date:

Issue count: 0 Audit date:

License status: Active Expiration date: 6/30/2023

[Print Renewal](#) [Print Delinquent Notice](#)

Business Types Included [Lookup](#) | [Bill](#) | [All](#)

Code	Type	Primary	Start Date	Status	Current Amt/Qty	Total Amt/Qty	Exempt Amt/Qty	Assess Type	Total Tax
RG FEE 2023 A	RG FEE 2023 A	True	2/1/2011	Active	80,000	80,000	0.00	Reported Actual	54.00

Requirements Business Type Requirements

Requirement	Expires	Approval Date	Status	By	State Cert Number	Additional Info	Add

Exemptions

Exemption	Modifier Type	BusType Code	Expires	Reqs Met	Entered Amount	Calc Amount

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- Need all except the following:
- Current
- Season Code
- Audit Date
- Consolidated returns
- Last period is total year recap
- Related PIN
- Trust tax account balance
- Last payment date
- Last payment amount

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Maintain Trust Tax Account
Notes Print Receipt Save List Finish

TT Account Created Online

Business name: TEST ACCOUNTS

Trade name: SANDZIMIER GREG F

Year:

Trust Tax Type: GR Tax and AOT Tax 2023

Rate: GR Tax

Start date:

Season code:

Status:

Business account: 0000005

Location Address: 27517 STROMBERG CT, HAYWARD, CA 94545 0000

Trust tax account: 10000427187

Filing Frequency: Annual Business Tax Ret

Out of business date:

Audit date:

Consolidated returns:

Last period is total year recap:

Related PIN:

Trust tax account balan \$168,615.00

Last payment date:

Last payment amount \$0.00

Current

Active	Per	Supp	Supp Reason	Asmt Type	Taxable Receipts	Total Tax	Fees	Penalty/Interest	Total	Paid	Due	Status
<input checked="" type="checkbox"/>	01	00	New Return	Reported Actual	\$0.00	\$56,205.00	\$0.00	\$0.00	\$56,205.00	\$0.00	\$56,205.00	Filed
<input checked="" type="checkbox"/>	02	00	New Return	Reported Actual	\$0.00	\$56,205.00	\$0.00	\$0.00	\$56,205.00	\$0.00	\$56,205.00	Filed
<input checked="" type="checkbox"/>	03	00	New Return	Reported Actual	\$0.00	\$56,205.00	\$0.00	\$0.00	\$56,205.00	\$0.00	\$56,205.00	Filed
<input checked="" type="checkbox"/>	04	00	New Return		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		Not Filed

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- Need all except the following:
- Active
- Supplement
- Tab +
- Reason
- Correction Reason
- Assessment type
- Status
- Previous payments
- Actual Column

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Notes Print Assessment Print Receipt Delete Save Work List Pay Post Correct Finish

Process Trust Tax Returns

Reported from Online

Business name: TEST ACCOUNTS Business account: 0000005

Trade name: SANDZIMIER GREG F Location Address: 27517 STROMBERG CT, HAYWARD, CA 94545 0000

Account: 10000427187

Year: 2023

Active:

Period: 1

Supplement: 0

Reason: New Return

Correction reason:

Type: GR Tax and ADT Tax 2023

Filing Frequency: Annual Business Tax Returns

Assessment type: Reported Actual

Status: Filed

File date: 3/3/2023

Bill number: 1622596600

Previous payments: 0.00

Return	Reported	Actual	Accept/Actual
Quarter 1 Installment	56,205.00	56,205.00	Override
Quarter 2 Installment	0.00	0.00	Override
Quarter 3 Installment	0.00	0.00	Override
San Francisco Gross Receipts Tax (not withstanding SBE)	0.00	0.00	Override
San Francisco Gross Receipts Tax - Tax Due	0.00	0.00	Override
Sum of Quarterly Installments	56,205.00	56,205.00	Override
Quarterly Installment Factor	1.00	1.00	Override
Additional Field (Placeholder)	0.00	0.00	Override
Gross Receipts Tax Due	56,205.00	56,205.00	Override
Fees			
Late Filing Penalty: Add \$100.00 if delinquent	0.00	0.00	Override
Administrative Fee: If filed or paid after due date add \$55	0.00	0.00	Override
Interest and Penalty			
Late Payment Penalty: 5% per month up to 20%, add 20% at month 4	0.00	0.00	Override
Interest: 1% of delinquent principal per month, accrues	0.00	0.00	Override
Substantial Underreporting Penalty	0.00	0.00	Override
Installment Penalty	0.00	0.00	Override
Summary			
Amount Due	56,205.00	56,205.00	Override

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Search for Payments/Surplus Search Close

Financial Transaction Type: Reapply

Payment/Surplus Search Criteria

Record type: **Payments**

PIN:

Tax year:

Paid by:

Check number:

Starting Business Date: Ending Business Date:

Receipt number: Receipt year:

Minimum amount: Maximum amount:

Bill number: Include Only if Current Taxes Owed:

Revenue source:

Surplus number:

Surplus-Subcode	Reason Code
<input type="checkbox"/> Advance Payment - Assessment Suit	<input type="checkbox"/> Error in data entry
<input type="checkbox"/> Advance Payment - Bankruptcy Escrow	<input type="checkbox"/> Paid wrong parcel
<input type="checkbox"/> Advance Payment - HX Tax Lien	<input type="checkbox"/> Entered with wrong date
<input type="checkbox"/> Advance Payment -	<input type="checkbox"/> Correction
	<input type="checkbox"/> Incorrect Bill
	<input type="checkbox"/> Paid in Error

Sort By: **Date**

Include exported refunds:

Advanced Search Criteria

Keep All

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Payment Search Results | Search Again | Previous | Next | Close

Search Results

<input type="checkbox"/>	Date	PIN	Name	Bill	Receipt	Receipt Year	Surplus Amount	Surplus Number	Surplus Subcode	Applied Amount
<input type="checkbox"/>	1/27/2023	10000010920	DUBAY JOYCE	1622573427	B23.4610	2023	\$0.00			\$1,000.00

Do not use

- Installment Dates tab
- AIN
- Geo Code
- Asmt year
- Roll caste
- Override Threshold for Write Offs
- TAG- TAG
- Class code
- Roll type
- Description
- Bill Type * RE Tax Bill
- Print Bill


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Home
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Adjust Charges
Write Off Balance
Write Off Charges
Installment Dates
Save
Cancel
Close

Bill Information

Bill number: 2023-2123058188 Owner: TEST ACCOUNTS

PIN: 20131172011 Situs: 27517 STROMBERG CT

AIN: 1942746 TAG: TAG - TAG

Acct: 0455787 Class code: 006 - 006 Business License

Geo code: Roll type: Business Tax Registration

Asmt year: 2023 Description:

Roll caste: Annual

Override Threshold for Write Offs

Change number Assign

Reason code Amendment

Comment

Action Adjust Tax

Bill Type *RE Tax Bill* | Print Bill

Amount

Allocation rule Tax Charge Correctic Apply

Charges						Good through date	8/7/2023
Type	Current Charges	Adjustment	Adjusted Charges	Amount Paid	Balance		
Tax	\$54.00			\$0.00	\$54.00		
Special Assessment	\$0.00			\$0.00	\$0.00		
Penalty	\$13.50			\$0.00	\$13.50		
Interest	\$8.10			\$0.00	\$8.10		
Fees	\$59.00			\$0.00	\$59.00		
Total	\$134.60			\$0.00	\$134.60		

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Ask IT what to keep

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View Functional Calendars New Save Close

Calendar	Functional Area	Calendar Type	Start Date	Year Mapping		
AA ABT Types	Assessment Administration	SF GR PY Quarterly	1/1	Start Date Year	Edit	Delete
AA Annual Business Tax Returns	Assessment Administration	ABT Returns Quarterly	1/1	Start Date Year	Edit	Delete
AA Annual Third Party	Assessment Administration	Annual Third Party	1/1	Start Date Year	Edit	Delete
AA Business License Supplement	Assessment Administration	Business License Supplemental	1/1	End Date Year + 1	Edit	Delete
AA Business Tax Receipts	Assessment Administration	Business License	7/1	End Date Year	Edit	Delete
AA CAN	Assessment Administration	Cannabis Apps & Permits	1/1	Start Date Year	Edit	Delete
AA FISH	Assessment Administration	Fishermans Wharf	1/1	Start Date Year	Edit	Delete
AA HHH	Assessment Administration	Healthy Housing Hotels	4/1	Start Date Year	Edit	Delete
AA New Business Tax Receipts	Assessment Administration	New Business License	7/1	End Date Year	Edit	Delete
AA Payroll Quarterly CY	Assessment Administration	SF Payroll Quarterly CY	1/1	Start Date Year	Edit	Delete
AA POS	Assessment Administration	Point of Sales	1/1	Start Date Year	Edit	Delete
AA QWC	Assessment Administration	QWC	1/1	Start Date Year	Edit	Delete
AA RCE Initial Year	Assessment Administration	SF RCE INITIAL YEAR	1/1	End Date Year	Edit	Delete
AA Regulatory Business License New	Assessment Administration	SF Regulatory Business License New	4/1	Start Date Year	Edit	Delete
AA Regulatory Business License Renewal	Assessment Administration	SF Regulatory Business License Renewal	4/1	End Date Year	Edit	Delete
AA Revenue Control Equipment	Assessment Administration	SF Revenue Control Equipment	1/1	Start Date Year	Edit	Delete

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Maintain Functional Calendar Save List Close

Name: Select functional year:

Functional area:

Calendar type: View Calendar

Start date:

Year mapping:

Period #1	Add Period Before	Add Period After	Delete
Period name: <input type="text" value="Default"/> Start date: 1/1			
End date: 12/31			
Event	Event Type	Date Formula	Add
2nd Penalty Start Date	2nd Penalty Start Date	3/1/Tax Year+1	Edit Delete
3rd Penalty Start Date	3rd Penalty Start Date	4/1/Tax Year+1	Edit Delete
4th Penalty Start Date	4th Penalty Start Date - Use for TT	5/1/Tax Year+1	Edit Delete
5th Penalty Start Date	5th Penalty Start Date	6/1/Tax Year+1	Edit Delete
Billing Date	Billing Date	1/1 in Tax Year	Edit Delete
Business Late File Penalty	Business Revenue Start Late File Date	1 days after DueDate	Edit Delete
Delinquent Date	Delinquent Date	1 days after DueDate	Edit Delete
DueDate	Due Date	1/31/Tax Year+1	Edit Delete
Interest Start Date	Interest Start Date	1 days after DueDate	Edit Delete
Penalty Start Date	Penalty Start Date	1 days after DueDate	Edit Delete

Ask IT what to keep

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Maintain Functional Calendar Save List Close

Name: Annual Third Party Select functional year: 2023

Functional area: Trust Tax

Calendar type: Annual Third Party View Calendar

Start date: 1/1

Year mapping: Start Date Year

Period #1	Add Period Before	Add Period After	Delete
Period name: Default	Start date: 1/1		
End date: 12/31			
Event	Event Type	Date Formula	Add
2nd Penalty Start Date	2nd Penalty Start Date	3/1/Tax Year+1	Edit Delete
3rd Penalty Start Date	3rd Penalty Start Date	4/1/Tax Year+1	Edit Delete
4th Penalty Start Date	4th Penalty Start Date - Use for TT	5/1/Tax Year+1	Edit Delete
5th Penalty Start Date	5th Penalty Start Date	6/1/Tax Year+1	Edit Delete
Billing Date	Billing Date	1/1 in Tax Year	Edit Delete
Business Late File Penalty	Business Revenue Start Late File Date	1 days after DueDate	Edit Delete
Delinquent Date	Delinquent Date	1 days after DueDate	Edit Delete
DueDate	Due Date	1/31/Tax Year+1	Edit Delete
Interest Start Date	Interest Start Date	1 days after DueDate	Edit Delete
Penalty Start Date	Penalty Start Date	1 days after DueDate	Edit Delete

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Home Asmt Admin Tax Cashiering Records Info Center Business Revenue Reports and Interfaces Configuration

Maintain Functional Calendar Save List Close

Name: Annual Third Party Select functional year: 2023

Functional area: Trust Tax

Calendar type: Annual Third Party View Calendar

Start date: 1/1

Year mapping: Start Date Year

Period #1	Add Period Before	Add Period After	Delete
Period name: Default	Start date: 1/1		
End date: 12/31			
Event	Event Type	Date Formula	Add
2nd Penalty Start Date	2nd Penalty Start Date	3/1/Tax Year+1	Edit Delete
3rd Penalty Start Date	3rd Penalty Start Date	4/1/Tax Year+1	Edit Delete
4th Penalty Start Date	4th Penalty Start Date - Use for TT	5/1/Tax Year+1	Edit Delete
5th Penalty Start Date	5th Penalty Start Date	6/1/Tax Year+1	Edit Delete
Billing Date	Billing Date	1/1 in Tax Year	Edit Delete
Business Late File Penalty	Business Revenue Start Late File Date	1 days after DueDate	Edit Delete
Delinquent Date	Delinquent Date	1 days after DueDate	Edit Delete
DueDate	Due Date	1/31/Tax Year+1	Edit Delete
Interest Start Date	Interest Start Date	1 days after DueDate	Edit Delete
Penalty Start Date	Penalty Start Date	1 days after DueDate	Edit Delete