Login to Aumentum: Manual> Figure 1 Aumentum Login	
User ID	
Password	

User ID :	ussername
Password :	••••
THOMSON REUTERS	
<b>AUMENTUM</b> <sup>®</sup>	
Version 10.00	
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## Search for a Business: Business Revenue> Business Maintenance: Aumentum manual Section 1

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

	IENTUM"							Jennif	er Pene Log Off	🔒 Data as of:	_	
Home	Asmt Admin	Тах	Cashiering	Records	Info Center	Business R	evenue	Reports and Interfaces	Configuration		-	
Searc	ch for a Busin	ess									Clear	Close
<b>*</b>												^
	Basic Search Info	ormation										
<b>.</b>	Business/Trade n	ame					Owner n	ame				
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Ø	Business account						Id type		Any		~	
ন্দ্র	Business class			Any		~	Id					
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(2)	Location number						Trust Tax	Acct number				
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	Search Results								Ту	Business Acc	ounts 🗸	
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## Common Actions Panel: Business Revenue> Business Maintenance: Aumentum manual> Introduction> Getting Started

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

Home	Asmt Admin	Tax	Cashiering	Records	Info Cent	er l	Business Rev	enue	Reports and Interface	s Config	uration		
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Comm	on Actions	ųΧ											
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								Incorpor	ation date				
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Notes: Business Revenue> Business Maintenance>Notes: Aumentum manual Section 24

AU											Jennifer I	Pene L	og Off 🔒	Data as of	: 8/3/2023	
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		Author:	jpene													
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													©20	)23 Thomson	Reuters   All rig	ghts reserved

# Maintain a Business Location: Add and Maintain Locations: Maintain a Business Screen> Add: Section 5.1

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

											Jennif	er Pene	Log Off 🔓
Home	Asmt Admin Tax	Cashiering	Records	Info Center	Busin	ess Revenue	Reports and	Interfaces	Configurat	ion			
Main	tain Business Loca	tion								Notes	Save	Finish	Cancel
*													
	Business name:	TEST ACCOUN	т5			Business accou	nt number:		000000	)5			
æ	Situs Address			Select	Edit	Trade Names							
Ø	27517 STROMBERG CT HAYWARD, CA 94545 00			55555	Luit	Trade Name	_	Prim	ary	_			Add
	HAYWARD, CA 94545 OC	100				SANDZIMIER	CREC E	Ø	-		L.	dit	Remove
ন্দ্র						SANDZIMIEK	GREGI						Keniove
	LIN:	0000005-00-00	00										
	Location number	0				Communicatio							
	Primary business type:	Various - Variou	us	Loc	ok Up	Туре	nis	Num	ber/Address				Add
	Date in operation	02/01/2011				Phone			5547353				Remove
	Date out-of-operation					E-mail Addres			om@sfqov.or				Remove
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	Discovery date												
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	Consolidated returns												

View License Summary Page: Business Revenu>Business Maintenance> Location Number> License Hyper link: Section 6

ome	Asmt Adr	min Tax	Cashiering	Records	Info Center	Business Revenue	Reports	and Interf	aces Confi	guration				
ew	License S	Summary									New	Returr		
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_	Trade name		DZIMIER GREG	F	Location Add	ress:	275:	17 STROME	BERG CT, HAY	VARD, CA 94545 0	0000	000		
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L P	Year 2023	License # 20131172011	Sup Status 0 Active		Type RG FEE 2023	Amt/Units A 80,000	Int/Pen	Fee	Type Total 54.00	License Total	Paid	Du		
			0				21.60	59.00		54.00	0.00	134.6		
		20231212553	0 Active		RG FEE 2023	A 80,000			54.00					
			0	ense Totals:			21.60	59.00 118.00	108.00	54.00 108.00	0.00 0.00	134.6 269.		

## Maintain a Business License Page> Business Maintenance> Location Number> License Hyper link: Section 6

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

Home	Asmt Admin	Тах	Cashiering F	Records	Info (	Center	Bus	siness Re	evenue	Repo	ts and	Interfaces	Со	nfigurat	ion			
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c Comn	non Actions	<b> т х</b>																
	Jp Business Types																	
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	ige Tax Bill Flags																	
	Correction Histor saction History	У	License Reven	ue Object	Data a	nd Naviq	ation						Tax	Bill Cha	irge Tot	als		
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	mation	ense						date		2/1/2011			date	e		3/ 1/ 202	2	
Busin	ness Detail		License numbe	er [20	)13117:	2011	~	Bill num	ber:	212	30581	88	Tax	:		54.0	D	
Busin	ness Detail (new)		Supplement	0		~		Roll typ	e	Bu	siness	Tax Reg 🗸	Cre	dits:		0.0	o ¥	i <u>ew</u> redits
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Active	e Tasks	ųΧ											Sur	plus:		0.0	D	
Home	е		License status	Ac	tive			Expirati date	on	6/30/202	3		Tota	al due:		134.6	D	
			Print Renewa	Print I	Delinqu	ent Notio	ce											
			Business Type	s Included	-	-		_	_		-		-	-		Lookup	Bill	
			Code	Туре		Primary	Star		Status	Current Amt/Otv		Total Amt/Otv		Exempt Amt/Qty	,	Assess 7	Гуре	Total Tax
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			Exemptions															
			Exemption	Modifie	er Type		BusT	ype Cod	e	Expires	R	eqrs Met	Er	ntered A	mount		Cal	c Amount

## Maintain Trust Tax Account Obligation: View Trust Tax Account Summary > Click Trust Tax> Maintain Trust Tax Account: Section 12.1

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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lome	Asmt	Admin	Tax	Cashiering	Records	Info Center	Business R	evenue	Reports ar	nd Interfaces	Configur	ation				
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P																
-	PTT Acc	ount (	Created	Online												
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$\sim$	Trade na	me:	5	SANDZIMIER GR	EG F	Location A	ddress:		2	27517 STROM	1BERG CT, H	AYWARD,	CA 9454	45 0000		
1 1	Year			2023	-	Trust tax acco	ount 10	000427187			Trust tax acco	unt balan	\$168,61	5.00		
	Trust Tax Type GR Tax and AOT Tax 2023		ax 2023	Filing Frequency Annual Business T					Last payment							
	Rate GR Tax Start date		Out of busir date	less				Last payment	amount	\$0.00						
1 6	5tart date 1/1/2023															
1	1/1/2023					Audit date										
	Season c	ode	ſ		-	Consolidate										
	Status	ouc		Active	-	Last period	is total year	~								
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ī	_					Related Filt										
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	Active	Per	Supp	Supp Reason	Asmt Type	Taxab	le Receipts	Total Tax	Fees	Penalty/Int	terest	Total	Paid	Due	e Sta	atus
	$\checkmark$	01	00	New Return	Reported Act	ual	\$0.00	\$56,205.00	\$0.00		\$0.00 \$56,	205.00	\$0.00	\$56,205.00	) File	led
	$\bigtriangledown$	02	00	New Return	Reported Act	Jal	\$0.00	\$56,205.00	\$0.00		\$0.00 \$56,	205.00	\$0.00	\$56,205.00	) File	led
	$\checkmark$	03	00	New Return	Reported Act	ual	\$0.00	\$56,205.00	\$0.00		\$0.00 \$56,	205.00	\$0.00	\$56,205.00	) File	led
	$\checkmark$	04	00	New Return			\$0.00	\$0.00			\$0.00	:	\$0.00		No	ot File

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#### Process Trust Tax Returns: View Trust Tax Account Summary> Maintain Trust Tax Account: Click line item to the filing you want to view> Section 12.1

Need all except the following: Active Supplement Tab + Reason Correction Reason Assessment type Status Previous payments Actual Column AUMENTUM Jennifer Pene Log Off 🗧 Tax Cashiering Records Info Center Business Revenue Reports and Interfaces Configuration Asmt Admin Notes Print Assessment Print Receipt Delete Save Work List Pay Post Correct Finis 10 ď Reported from Online æ TEST ACCOUNTS Business account: 0000005 Business name: SANDZIMIER GREG F 27517 STROMBERG CT, HAYWARD, CA 94545 0000 Trade name: Location Address: a ഹ്മ 10000427187 Return Account:  $\sim$ Reported 2023 Actual Year: Quarter 1 Installment 56,205.00 56,205.00 Override 0 1 Active Quarter 2 Installment 0.00 0.00 Override ~ Period 1 Supplement 0 **∨** + Quarter 3 Installment 0.00 0.00 Override San Francisco Gross Receipts Tax (not withstanding SBE) New Return ~ Reason 0.00 0.00 Override Correction reason  $\sim$ San Francisco Gross Receipts Tax - Tax Due 0.00 0.00 Override Type: GR Tax and AOT Tax 2023 Sum of Quarterly Installments 56,205.00 Override 56,205.00 Override Filing Frequency: Annual Business Tax Returns Quarterly Installment Factor 1.00 1.00 Override Reported Actual Assessment type ~ Additional Field (Placeholder) 0.00 0.00 Override Status Filed  $\checkmark$ Gross Receipts Tax Due 56.205.00 Override 56.205.00 Override File date 3/3/2023 1622596600 Bill number: Previous payments: 0.00 Late Filing Penalty: Add \$100.00 if delinguent 0.00 Override 0.00 Override

Administrative Fee: If filed or paid after due date add \$55

Late Payment Penalty: 5% per month up to 20%, add 20% at month 4

Interest: 1% of delinquent principal per month, accrues

Substantial Underreporting Penalty

Installment Penalty

Amount Due

0.00

0.00

0.00

0.00

0.00

56,205.00

Override

Override

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	Payment/Surplus Sear											
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	Tax year			1								
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Search for Payments/Surplus: Search Aumentum system for specific payments (via reallocate/reapply screens) 1. Navigate to Tax > Accounts Receivable > Manage Payments > Reapply > Search for Payments/Surplus, 2. Enter your search parameters. > Section 16

# SearchforPayments/Surplus: Tax> Accounts Receivable> Manage Payments> Section 16

Keep All

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				JOICE								

# Adjust Charges: Process Correction> Adjust Charges> Section 17.1.2

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

ne	Asmt Admin	Tax	Cashiering	Records	Info Center	В	usiness Revenue	Reports and I	nterfaces	Con	figuration	
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100	nterest			\$8.10					\$0.00			.10
Fe	ees			\$59.00					\$0.00		\$59	
T	otal		Ś	134.60					\$0.00		\$134	.60

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#### View Functional Calendars: Configuration > Localization > Functional Calendar> View: App Support Aumentum Manual Secton 10.8

## Ask IT what to keep

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	A Annual Business Tax eturns	Assessment Administration	ABT Returns Quarterly	1/1	Start Date Year	Edit Delete			
	A Annual Third Party	Assessment Administration	Annual Third Party	1/1	Start Date Year	Edit Delete			
	A Business License upplement	Assessment Administration	Business License Suppplemental	1/1	End Date Year + 1	Edit Delete			
17	A Business Tax Receipts	Assessment Administration	Business License	7/1	End Date Year	Edit Delete			
A	A CAN	Assessment Administration	Cannabis Apps & Permits	5 1/1	Start Date Year	Edit Delete			
A	A FISH	Assessment Administration	Fishermans Wharf	1/1	Start Date Year	Edit Delete			
A	АНН	Assessment Administration	Healthy Housing Hotels	4/1	Start Date Year	Edit Delete			
	A New Business Tax eceipts	Assessment Administration	New Business License	7/1	End Date Year	Edit Delete			
A	A Payroll Quarterly CY	Assessment Administration	SF Payroll Quarterly CY	1/1	Start Date Year	Edit Delete			
A	A POS	Assessment Administration	Point of Sales	1/1	Start Date Year	Edit Delete			
A	A QWC	Assessment Administration	QWC	1/1	Start Date Year	Edit Delete			
A	A RCE Initial Year	Assessment Administration	SF RCE INITIAL YEAR	1/1	End Date Year	Edit Delete			
	A Regulatory Business icense New	Assessment Administration	SF Regulatory Business License New	4/1	Start Date Year	Edit Delete			
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A	A Revenue Control quipment	Assessment Administration	SF Revenue Control Equipment	1/1	Start Date Year	Edit Delete			

Home	Asmt Admin	Tax	Cashiering	Records	Info Center	Business Revenue	Reports and Interfa	ces Configuration		
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#### Ask IT what to keep

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		-						e Log Off 🔒	- 0 /0 /0000 - F	<b></b>	
Home		Tax	Cashiering	Records	Info Center	Business Revenue	Reports a	nd Interfaces	Configuration		-
Main	tain Functiona	l Caler	ıdar						Save	List	
¢											
1	Name	Annu	al Third Party			Select functi year	onal 2023	3 ~			
F	Functional area	Trust	Tax	~							
	Calendar type	Annu	al Third Party	~		View Ca	lendar				
	Start date	1/1									
	Year mapping	Start	Date Year	~							
2	D 1 4 4										
2	Period #1				Add Period		iod After	Delete			
-	Period name [ End date: 12/	Default			Start di	ate: 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 I	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 Re	venue Start	Late File Date	1 days after DueDat	e Edit	Delete			
	Delinquent Date		Delinquent	Date		1 days after DueDat	e Edit	Delete			
	DueDate		Due Date			1/31/Tax Year+1	Edit	Delete			
	Interest Start Date	9	Interest Sta	rt Date		1 days after DueDat	e Edit	Delete			
	Penalty Start Date		Penalty Star	rt Date		1 days after DueDat	e Edit	Delete			

