

evolve Cheat Sheet

STEP ONE: Log In



STEP TWO: Click on "Financial Reporting"



evolve HOME **FINANCIAL REPORTING** BOOKINGS LISTINGS REQUESTS REFERRALS

Look Who's Coming to Visit, [REDACTED]

See what bookings you officially have on the calendar so you can prepare for five-star guest experiences.

BOOKINGS Upcoming Arrivals

All

[REDACTED]
02/20/23 to 02/27/23

[VIEW BOOKING CALENDAR](#)

My Stats

YTD

PAYMENTS
\$0

BOOKINGS
0

NIGHTS
0

AVG RATE
\$0

STEP THREE: Click on "Taxes"

evolve HOME FINANCIAL REPORTING BOOKINGS LISTINGS REQUESTS REFERRALS

Financial Reporting

Access the financial details of your bookings, including payouts and taxes collected, so it's easy to run any reports you need.

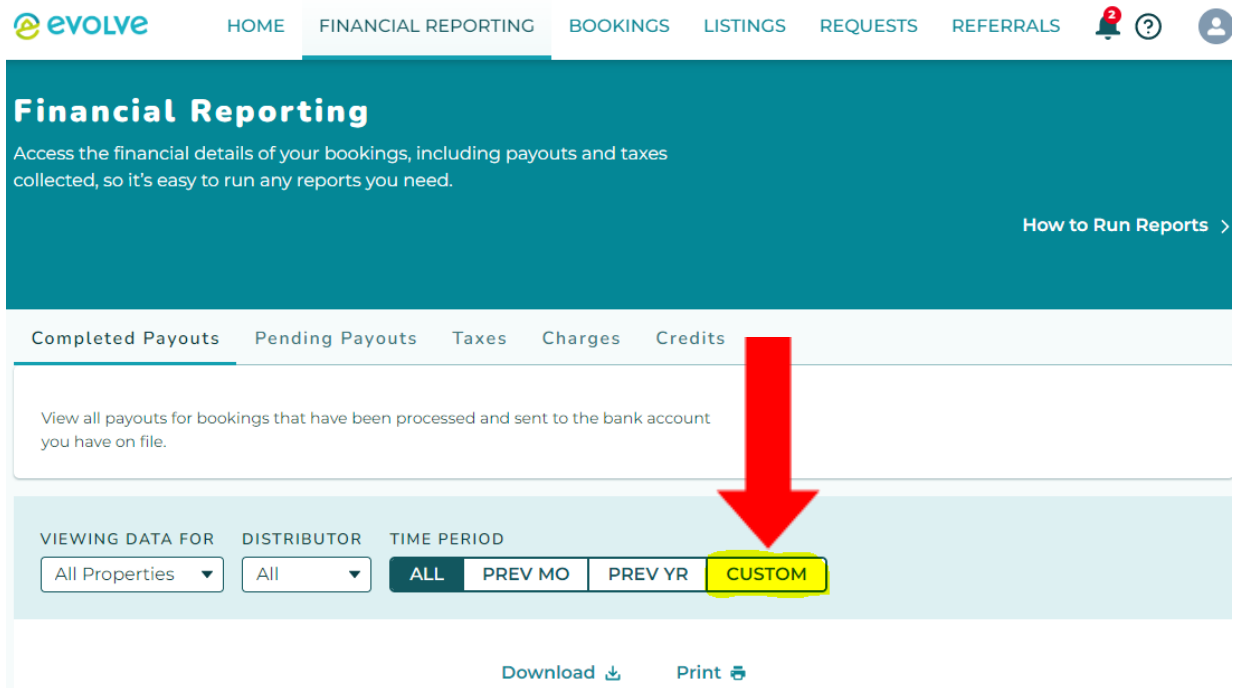
[How to Run Reports](#)

Completed Payouts Pending Payouts **Taxes** Charges Credits

View all payouts for bookings that have been processed and sent to the bank account you have on file.

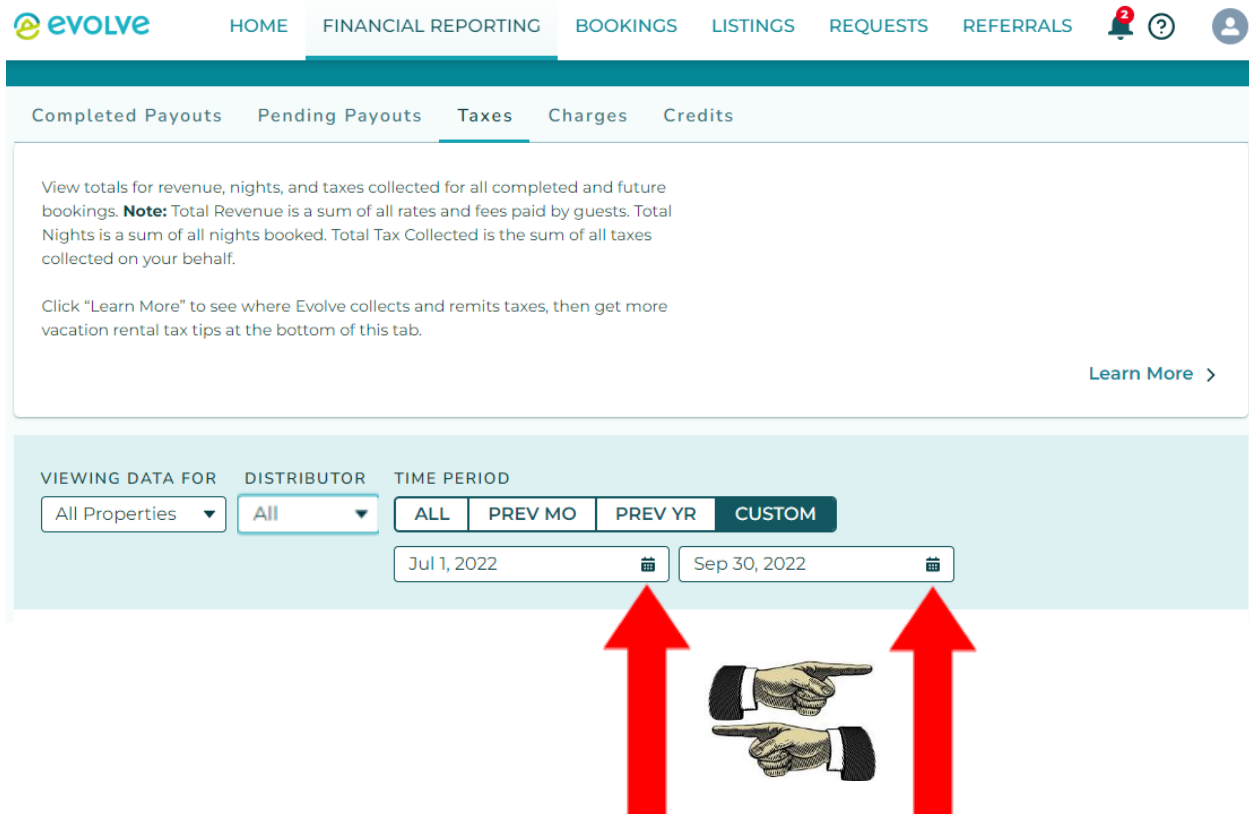
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STEP FOUR: Click on "Custom"



The screenshot shows the Evolve Financial Reporting dashboard. The navigation bar includes HOME, FINANCIAL REPORTING, BOOKINGS, LISTINGS, REQUESTS, and REFERRALS. The main heading is "Financial Reporting" with a sub-heading "Access the financial details of your bookings, including payouts and taxes collected, so it's easy to run any reports you need." Below this is a "How to Run Reports" link. The "Completed Payouts" tab is selected, showing a description: "View all payouts for bookings that have been processed and sent to the bank account you have on file." The filter section includes "VIEWING DATA FOR" (All Properties), "DISTRIBUTOR" (All), and "TIME PERIOD" (ALL, PREV MO, PREV YR, CUSTOM). The "CUSTOM" button is highlighted in yellow, with a large red arrow pointing to it. Below the filters are "Download" and "Print" buttons.

STEP FIVE: Enter the date range for the QTR you will be filing (this example is QTR 3)



The screenshot shows the Evolve Financial Reporting dashboard with the "Taxes" tab selected. The main heading is "Taxes" with a sub-heading: "View totals for revenue, nights, and taxes collected for all completed and future bookings. **Note:** Total Revenue is a sum of all rates and fees paid by guests. Total Nights is a sum of all nights booked. Total Tax Collected is the sum of all taxes collected on your behalf." Below this is a "Learn More" link. The filter section includes "VIEWING DATA FOR" (All Properties), "DISTRIBUTOR" (All), and "TIME PERIOD" (ALL, PREV MO, PREV YR, CUSTOM). The "CUSTOM" button is selected, and the date range "Jul 1, 2022" to "Sep 30, 2022" is entered. Two large red arrows point to the date input fields, and a hand icon points to the date range.

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STEP SIX: As soon as the date range is entered **ALL** data will appear! See **Distributor** box with drop down arrow defaults to **ALL**. This shows all the companies Evolve uses to book short term rentals ” such as AirBnB, VRBO, Evolve, Flipkey, etc and combines them to provide the following.

1) Your Total Gross (Entered into box #2 on the MuniRev Report – visual example shown in second to last page of these instructions)

2) The total number of nights rented (Entered into box 1c on the MuniRev Report – visual example shown in second to last page of these instructions)

3) Total tax collected... this should be zero since AirBnB and Evolve are paying all taxes on your behalf. You will be reporting Total Gross so the County can calculate the amount of tax they should be paying on your behalf.

The screenshot shows the Evolve dashboard with the 'Taxes' tab selected. The 'VIEWING DATA FOR' section includes filters for 'All Properties', 'All' distributor, and 'CUSTOM' time period from 'Jul 1, 2022' to 'Sep 30, 2022'. Below the filters are 'Download' and 'Print' buttons. A summary table at the bottom lists 'TOTAL REVENUE' (\$17,277.80), 'TOTAL NIGHTS' (61), and 'TOTAL TAX COLLECTED' (\$0.00). Red arrows point to the 'All' distributor filter, the 'Download' button, and the 'TOTAL REVENUE' row. Red numbers 1, 2, and 3 are placed next to the revenue, nights, and tax rows respectively.

VIEWING DATA FOR	DISTRIBUTOR	TIME PERIOD
All Properties	All	ALL PREV MO PREV YR CUSTOM
		Jul 1, 2022 Sep 30, 2022

Download | Print

TOTAL REVENUE	AKA = TOTAL GROSS	1	\$17,277.80
TOTAL NIGHTS		2	61
TOTAL TAX COLLECTED		3	\$0.00

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IF you want more detail you can choose to use the “Download” link at any time and see the data broken down in excel.

The screenshot shows the Evolve Financial Reporting interface. At the top, there is a navigation bar with the Evolve logo and menu items: HOME, FINANCIAL REPORTING (highlighted), BOOKINGS, LISTINGS, REQUESTS, and REFERRALS. There are also notification and user icons. Below the navigation bar, there is a filter section with the following options:

- VIEWING DATA FOR: All Properties (dropdown)
- DISTRIBUTOR: All (dropdown)
- TIME PERIOD: ALL, PREV MO, PREV YR, CUSTOM (radio buttons)
- Date range: Jul 1, 2022 to Sep 30, 2022 (calendar icons)

Below the filter section, there is a red arrow pointing to a "Download" button with a download icon, which is circled in red. Next to it is a "Print" button with a printer icon. Below these buttons is a summary table:

TOTAL REVENUE	\$17,277.80
TOTAL NIGHTS	61
TOTAL TAX COLLECTED	\$0.00

If you need help you can click on the link “HOW TO RUN REPORTS” and review the information provided.

The screenshot shows the Evolve Financial Reporting interface. At the top, there is a navigation bar with the Evolve logo and menu items: HOME, FINANCIAL REPORTING (highlighted), BOOKINGS, LISTINGS, REQUESTS, and REFERRALS. There are also notification and user icons. Below the navigation bar, there is a teal banner with the text "Financial Reporting" and a sub-header "Access the financial details of your bookings, including payouts and taxes collected, so it's easy to run any reports you need." Below this banner, there is a green button with the text "How to Run Reports >". Below the banner, there is a sub-navigation bar with the following items: Completed Payouts, Pending Payouts, Taxes (highlighted), Charges, and Credits.

You can also use link below to access the information to the reports page.

<https://help.evolve.com/s/article/How-do-I-run-reports>

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How Do I Run Reports?

You can easily access reports on taxes, payouts, and bookings right from your Evolve [Owner Account](#). We've recently updated our reporting system to make it simpler and more intuitive for you.

Payout Reports and Tax Reports

Visit your Owner Account and click on the "Financial Reporting" tab. On this page, you will be able to choose between Completed Payouts, Future Payouts, and Taxes. Once you've picked a type of report (i.e.: "taxes"), filter by the time period or range of dates that you would like to see displayed.

Payouts: Both payouts sections display the guest name, dates of stay, reservation ID and the payout amount. Click the download or print button above this section should you need more detailed information.

Tax Reports: In your taxes reports, you'll be able to see the name of the guest, reservation ID, dates of the stay your total revenue, and the tax we collected. If you need more detailed information like **gross total**, Evolve management fee, or third-party booking fee amount, please click the **download** or print button.

EXAMPLE: [MUNIREV'S / GOVos](#) DESCHUTES COUNTY SHORT TERM RENTAL REPORTING FORM

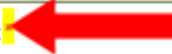
This form uses all the data provided in the snapshots throughout the cheat sheet. You can reference the material in the snapshots to see where items are entered on the reporting form.

STEP SEVEN: Filing out the reporting form (if a box has an asterisk in it you can click on it for more detailed explanation of what needs to be entered – see labeled arrow below).

- **1a** number of units rented (example 1 home)
- **1b** number of available room nights to rent (example 92 nights available)
- **1c** number of room nights actually rented (example 61 nights rented)
- **2** Total Gross (example 17,277.80)
- **3f** Deductions - Go to 3f and enter the "Total Gross" from line "2" and type "Evolve" in the description box
- Once you tab out of box 3f line # "12" on your report should be zero. If it is not you may have entered some data incorrectly. All taxes have already been paid on your behalf, you are just reporting the data so we know how much tax should have paid on your behalf.

see example following this page

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Transient Room Tax Reporting Form		
1a	Number of Taxable Homes/Units Available to Rent  Asterisk	1.00
1b	Number of Available Room Nights (click for details) *	92.00
1c	Number of Room Nights Rented (click for details) *	61.00
2	Total Gross Rent (click for details) *	17277.80
3a	Less Rents and fees for stays over 30 successive calendar days	0.00
3b	Less Recreation Fees for use of Destination Resort Facilities (click for details)	0.00
3c	Less Airbnb Platform Rentals (click for details)	0.00
3d	Less VRBO Platform Rentals (click for details)	0.00
3e	Less Expedia Platform Rentals (click for details)	0.00
3f	Less Other 3rd Party Intermediary Please list: (click for details)	17277.80
3g	Less Other. Please list:	0.00
4	Total Allowable Deductions	17277.80
5	Taxable Rent	0.00
6	Tax Due (Multiplies Line 5 by 8%)	0.00
7	Less Collection Reimbursement Fee (Multiply Line 6 by 5%)	0.00
8	Net Tax Due	0.00
9	Penalty (10% of line 8 plus 15% of line 8 if additional 30 days past due)	0.00
10	Interest (1/2 of 1% of line 8 per month)	0.00
11	Total Penalty and Interest (Line 9 + Line 10)	0.00
12	Total Amount of Tax Due (Line 8 + Line 11)	0.00

AFTER SUBMITTING THIS FORM with the orange submit button below, ALL FILERS must continue through the shopping cart to obtain a receipt, including Zero Filers.

ZERO RETURN: You must complete a zero dollar filing. Submit your form below, moving through the cart to complete the zero transaction.

Once a form has been properly completed, a receipt will be issued and the form will no longer appear as an open task in the Business Center.

STEP EIGHT: At the bottom of the form you will sign your name, title (Owner), and click on the orange "Submit" button.

I CERTIFY UNDER PENALTY OF PERJURY THAT THE ABOVE INFORMATION IS TRUE AND CORRECT TO THE BEST OF MY KNOWLEDGE.

Name (as electronic signature) **

Title **

Date **

Save and Return to Business Center

Submit

Cheat Sheet

STEP NINE: You are filing a “Zero Cost Checkout” simply click the orange “Payment Method” button (You are paying “ZERO DOLLARS”).



Business Center
Deschutes County > Business Center > Shopping Cart


✔ Form Received.
✔ Proceed with Checkout.

Cart Items

NOTE - If you have a **Zero Amount Due**, you **MUST** click the **Payment Method** button below to proceed to the **Zero Cost Checkout** to properly complete your form.

Transient Room Tax (remove)	due 1/16/23	\$ 0.00
Total (US Dollars)		\$ 0.00

Back to Business Center Payment Method



STEP TEN: The final step is to click on the orange “Complete Transaction” button and this will finalize your report. This will take you back to the main Business Center page (you can click on the Deschutes County Logo at any time to return to the homepage). Your completed filing is on the right hand side under “Actions”. **YOU ARE DONE!** 😊



Business Center
Deschutes County > Business Center > Shopping Cart > Payment Method

Payment Method

Bank Account.

Zero Cost Checkout

You are checking out with no amount due.

To continue with this process, click the "Complete Transaction" button below.

Back to Business Center Back to Cart Complete Transaction

