

# Tax Setup

Last Modified on 04/28/2026 9:00 am PDT

**Pathway:** [Setup](#) > [Accounting](#) > [Tax](#)

**Tax Setup** identifies the taxes (City, State, Franchise, etc) that are applicable to accounts. Taxes added here are not individually assigned to accounts and sites, instead, they must be added to a [Tax Region](#) or a [Tax Class](#) for application.

**Tax Region** - A Tax Region is a location-based tax applied to a site based on its address. These typically include state and local taxes the site is subject to.

**Tax Class** - A Tax Class groups together taxes that can be applied to service codes, charge codes, and services, such as taxes on labor or equipment.

ID	NAME	TYPE	GL ACCOUNT	LEVEL	TAXABLE	ADMIN AREA	TAX AUTHORITY TYPE	TAX AUTHORITY CODE
1000	E TRAVIS COUNTY GA...	Percentage %	Sales Tax Payable	Franchise Fee	Yes			asdfasdfd
1001	BLANCO COUNTY	Percentage %	Sales Tax Payable	Tax	Yes			4016002
1002	BLANCO CO ESD 1	Percentage %	Sales Tax Payable	Tax	Yes			5016529
1003	BLANCO CO S LIB DIST	Percentage %	Sales Tax Payable	Tax	Yes			5016501
1004	BLANCO CO ESD 2	Percentage %	Sales Tax Payable	Tax	Yes			5016538
1005	BUDA CITY	Percentage %	Sales Tax Payable	Tax	Yes			2105031
1006	CALDWELL COUNTY	Percentage %	Sales Tax Payable	Tax	Yes			4028008
1007	CALDWELL HAYS ESD ...	Percentage %	Sales Tax Payable	Tax	Yes			5028507
1008	COMAL COUNTY	Percentage %	Sales Tax Payable	Tax	Yes			4046006
1009	COMAL CO ESD 7	Percentage %	Sales Tax Payable	Tax	Yes			5046587
1010	COMAL CO ESD 6	Percentage %	Sales Tax Payable	Tax	Yes			5046532
1011	COMAL ESD 3 CLLD	Percentage %	Sales Tax Payable	Tax	Yes			5046523
1012	COMAL CANYON LL ...	Percentage %	Sales Tax Payable	Tax	Yes			5046505
1013	COMAL CO ESD 4 CLLD	Percentage %	Sales Tax Payable	Tax	Yes			5046550
1014	DRIPPING SPRINGS CITY	Percentage %	Sales Tax Payable	Tax	Yes			2105040
1015	HAYS COUNTY	Percentage %	Sales Tax Payable	Tax	Yes			4105004
1016	DRIPPING SPGS LIB DIS	Percentage %	Sales Tax Payable	Tax	Yes			5105512
1017	FAYETTE COUNTY	Percentage %	Sales Tax Payable	Tax	Yes			4075000

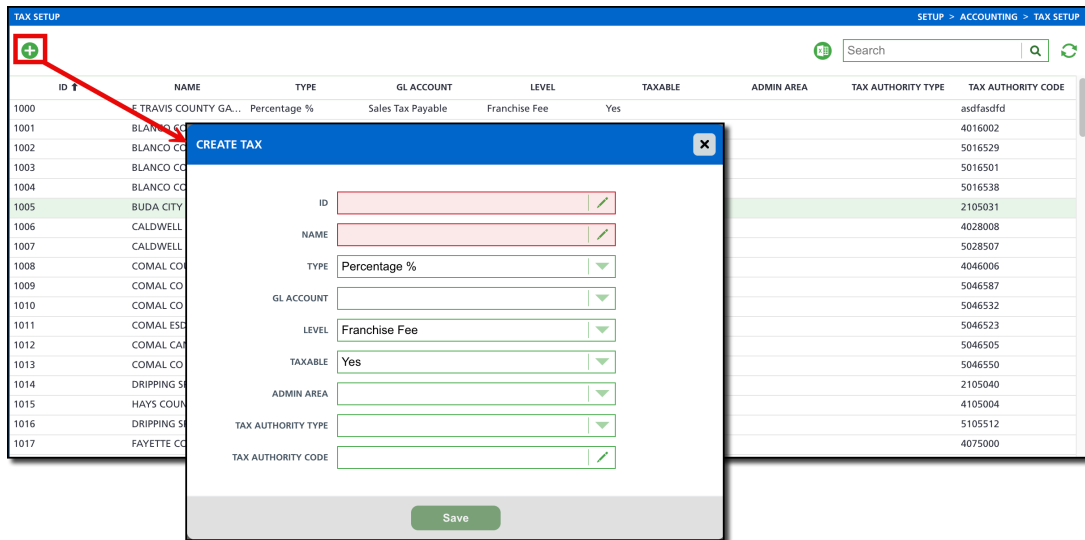
## Field Descriptions

Fields	Descriptions
<b>ID</b>	The unique ID for the Tax.
<b>Name</b>	The Name of the Tax.
<b>Type</b>	The tax type used for calculations during billing. Taxes can be a percentage, flat rate or per unit rate.
<b>GL Account</b>	The GL Account that the tax is tracked under. This is selected from a list of available GL accounts. For more information, check out <a href="#">GL Account Setup</a> and <a href="#">GL Segmentation Setup</a>
<b>Level</b>	The level the tax is identified with. <ul style="list-style-type: none"> <li>• Franchise Fee</li> <li>• Tax</li> <li>• Tax (on Tax)</li> </ul>
<b>Taxable</b>	Controls if the tax will be applied.

<b>Admin Area</b>	The state administration that this tax applies too.
<b>Tax Authority Type</b>	The geographic or administrative regions the tax is specific to.
<b>Tax Authority Code</b>	The code that is used by the Tax Region for tax verification purposes.

## Add/Edit a Tax

Follow the simple process outlined here to create a new tax or modify an existing one.



### To Add

1. Click the **green +** icon to open the *Create Tax* popup.
2. Enter the Required fields:
  - a. A unique ID to identify the tax.
  - b. A descriptive Name for the tax.
3. Check the Default values and change, if needed.
4. Complete additional fields based on your company's tax setup requirements.
5. Click **Save** when finished.

### To Edit

1. Double click on the Tax row to open the Update Tax editor.
2. Make changes, as needed. The system auto-saves as values are changed.

## Application of Use

Creating a Tax does not actually cause it to be applied to anything. Once created, the tax **must** be added to a tax region or tax class for it to be applied. This required next step is critical for taxes to be included when an account/site is billed.

### Tax Region

**Pathway:** *Setup > Accounting > Tax Region*

The **Tax Region Setup** screen defines geographic areas where specific tax sets apply. When a tax region is assigned to an account or site, the associated taxes are automatically applied during billing. A Tax Region

may have one or more applicable tax rates. These are applied in the lower grid and is where the Taxes set up in the Tax Setup screen come into play.

When adding a new Tax Rate, the tax options provided in the Tax field are those created in the Tax Setup screen. Detailed information including setup can be reviewed here: [Tax Region Setup](#).

The screenshot displays the 'TAX REGION SETUP' interface. At the top, there is a search bar and a refresh icon. Below is a table with columns for 'TAX REGION ID', 'NAME', and 'ACTIVE'. The table lists various tax regions, with 'CALDWELL CO ESD 2' (ID 1006) highlighted in yellow. Below the table is a 'Tax Rate' section with a '+' icon in a red box. A modal window titled 'ADD / EDIT TAX RATE' is open, showing a dropdown for 'TAX' with 'AUS-HAYS ESD 1-6A Tax - Percentage %' selected. The modal also shows 'EFFECTIVE DATE' and 'RATE' fields.

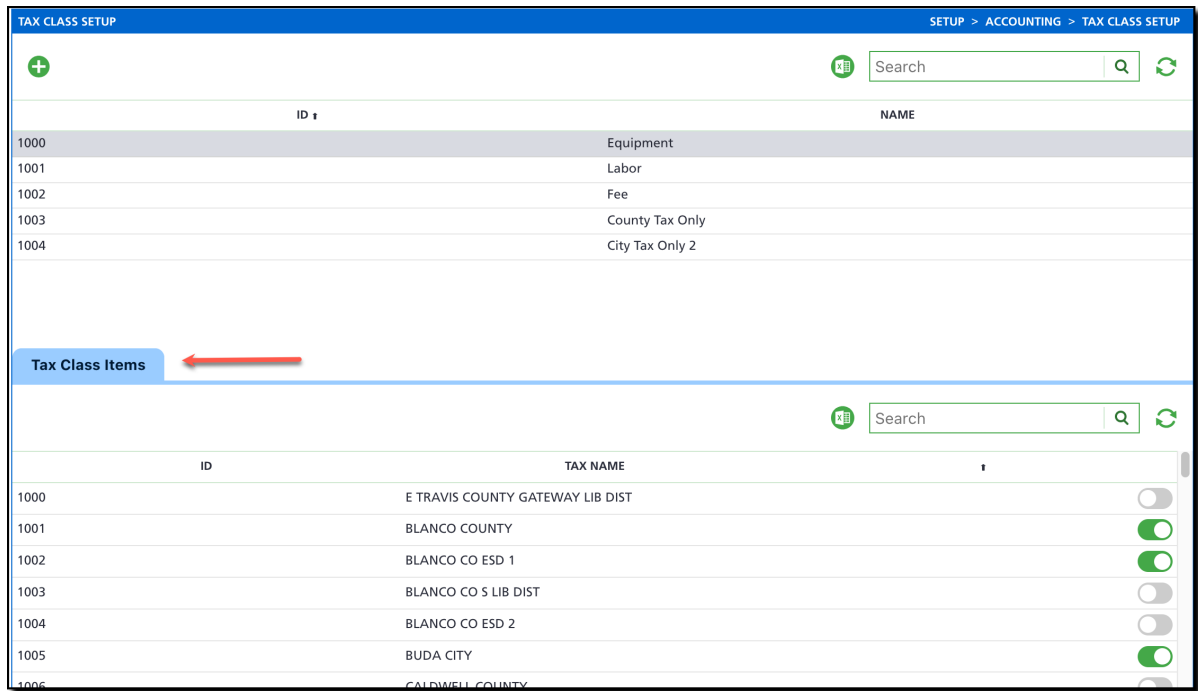
TAX REGION ID	NAME	ACTIVE
1000	AUSTIN CITY-MTA-ETGW	Yes
1001	BLANCO ESD 1 BSLD	Yes
1002	BLANCO CO ESD 2 BSLD	Yes
1003	COMAL CO ESD 7	Yes
1004	CALDWELL COUNTY	Yes
1005	CALDWELL CO ESD 1-A	Yes
1006	CALDWELL CO ESD 2	Yes
1007	CALDWELL-HAYS ESD 1A	Yes
1008	COMAL CO ESD 6	Yes
1009	AUS-COMAL ESD 3 CLLD	Yes
1010	COMAL CO ESD 4 CLLD	Yes
1011	DRIPPING SPRNGS CITY	Yes
1012	FAYETTE COUNTY	Yes
1013	GONZALES COUNTY	Yes

TAX	LEVEL	TYPE	RATE	START DATE
TEXAS STATE				01/01/23
CALDWELL COUNTY	Tax			01/01/23
CALDWELL CO ESD 2	Tax			01/01/23

## Tax Class

**Pathway:** Setup > Accounting > Tax Class

A **Tax Class** is a container that groups together multiple taxes that can be applied to services. Once created, you can add taxes to the class and assign it to service codes, charge codes and surcharges. Further information including setup can be reviewed here: [Tax Class](#).



## Permission

The following permission is required to view and edit in the Tax Setup screen:

Permission ID	Permission Name
22	Setup \ Accounting

## Database Query Mapping

**Pathway:** [Database > Database Query](#)

To explore how taxes are defined and applied, you should primarily query the *Tax Details* entity. Here is the breakdown of the specific entities and fields that will give you this visibility.

**Entity:** *Tax Details* - for auditing how taxes are calculated. It allows you to see the "why" behind the tax amounts on an invoice.

- **Tax Authority Type Name** the different "levels" of tax (e.g., State, County, City, or Special District)
- **Tax Name** the specific name of the tax
- **Taxablerevenue** the portion of the invoice that was subject to tax
- **Taxexempt** a flag that tells you if a specific line item or site was treated as non-taxable
- **Taxes** the actual dollar amount of tax calculated for that specific authority
- **Tax Authority Code** the specific ID used for reporting to government agencies

When using the *Tax Details* entity, you can join it to the Revenue entity (using `Invoiceid`) or *Accounts and Sites* (using `Accountid`) to see which specific services or customer types are driving your tax liabilities. This is the best way to audit if your "Commercial" vs "Residential" tax rules are being applied correctly.

**Entity:** *Accounts and Sites* - for customer tax setup and exemptions

- **Site Tax Region Name** the tax jurisdiction assigned to the physical service location
- **Site Tax Exempt Id** / **Site Tax Exempt Reason** the legal reason why a customer isn't paying taxes

## Related Articles

Tax Region Setup  
Tax Class Setup

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