

Tax Setup

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This article provides tax setup information and covers the following screens in Navusoft: Tax Setup, Tax Region, and Tax Rate.

Tax Setup

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/sites and must be added to a Tax Region for application.

ID ↑	NAME	TYPE	GL ACCOUNT	LEVEL	TAXABLE	ADMIN AREA	TAX AUTHORITY TYPE	TAX AUTHORITY CODE
1000	E TRAVIS COUNTY GATEWAY LIB...	Percentage %	Sales Tax Payable	Tax	Yes			5227579
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 1A	Percentage %	Sales Tax Payable	Tax	Yes			5028507
1008	COMAL COUN				Yes			4046006
1009	COMAL CO ESD				Yes			5046587
1010	COMAL CO ESD				Yes			5046532
1011	COMAL ESD 3				Yes			5046523
1012	COMAL CANYO				Yes			5046505
1013	COMAL CO ESD				Yes			5046550
1014	DRIPPING SPRIN	Percentage %			Yes			2105040
1015	HAYS COUNTY				Yes			4105004
1016	DRIPPING SPGS				Yes			5105512
1017	FAYETTE COUN				Yes			4075000
1018	GONZALES COU				Yes			4089004
1019	GONZALES CIT				Yes			2089022
1020	GUADALUPE C				Yes			4094007
1021	HAYS ESD 1-6A				Yes			5105601
1022	HAYS ESD 1-6A				Yes			5105629
1023	HAYS ESD 3				Yes			5105530
1024	HAYS ESD 4				Yes			5105638
1025	HAYS CO ESD 4				Yes			5105638
1026	AUS-HAYS ESD				Yes			5105629

Permission

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

Permission ID	Permission Name
22	Setup \ Accounting

Tax Setup Field Descriptions

Fields	Descriptions
ID	The ID of the Tax.
Name	The Name of the Tax.

Type	Identifies how the tax rate is calculated during billing. Taxes can be a percentage, flat rate or per unit rate.
GL Account	Displays a list of available GL accounts. If a tax should be tracked under a specific GL account, select it here.
Level	Select the level the tax is identified with. <ul style="list-style-type: none"> • Franchise Fee • Tax • Tax (on Tax)
Taxable	Controls if the tax will be applied.
Admin Area	Select the state administration that this tax applies too.
Tax Authority Type	Indicates the geographic or administrative regions the tax is specific to.
Tax Authority Code	Code that is used by the Tax Region for tax verification purposes.

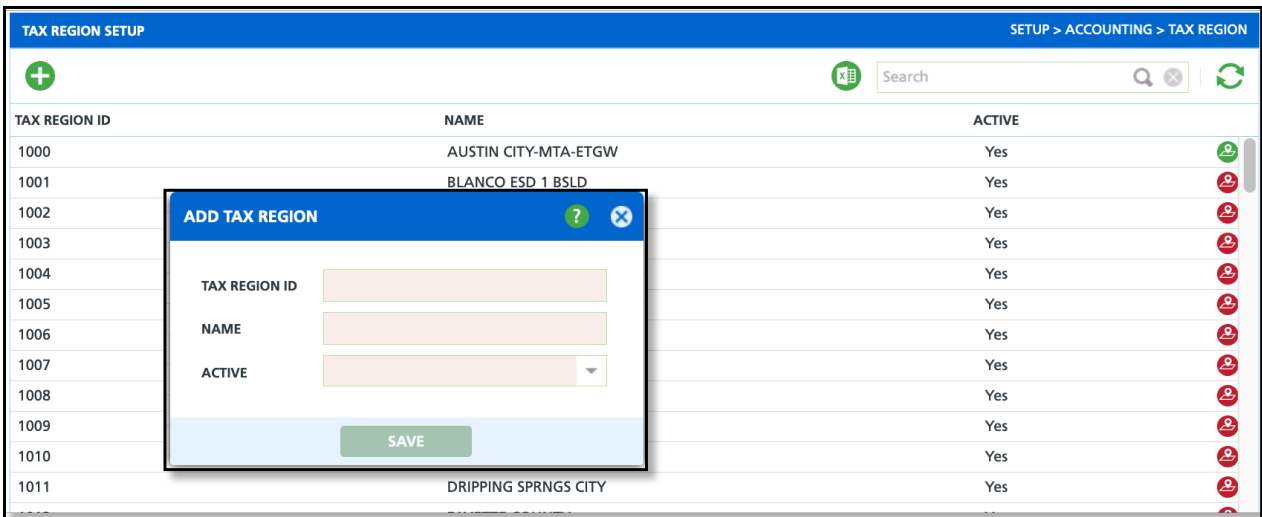
Add a Tax

1. Click the **green +** icon to open the Add Tax editor.
2. Complete the following required fields:
 - Enter an **ID** for the tax.
 - Enter a **Name** for the tax.
3. Complete additional fields based on your company's tax setup requirements.
4. Click **Save** when finished.

Tax Region

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

The Tax Region Setup feature 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. This screen also offers an optional setup for default tax regions, allowing you to define areas using an interactive perimeter mapping tool.



Add Tax Region Field Descriptions

Field	Descriptions
Tax Region ID	The Tax Region ID.
Name	The name of the Tax Region that displays in the Tax Region drop down when an account/site is added or edited.
Active	Controls if the tax region is available for selection in the Tax Region drop down field.
Map Area (Icon)	Establishes default tax regions that will be applied when a new account or site is created that falls within the mapped perimeter.

Setup: Add Tax Region

1. Click the **green +** to to open the Add Tax Region tool.
2. Enter the **Tax Region ID**.
3. Enter a **Name** for the Tax Region
4. Select the **Active** status for the Tax Region.
5. Click **Save** when finished.

Create Default Tax Region Settings (Map)

An optional setting enables the creation of default tax regions through an interactive map. These tax regions are automatically applied when a new account or site is created within the defined perimeter boundary.

Configuration

To configure, click the tax region icon to open the 'Map Area' popup window. Use the perimeter tool within the map to define boundaries around the tax region. Once a perimeter is set, the tax region icon will display in green. Multiple perimeters can be defined for a single tax region.

TAX REGION SETUP SETUP > ACCOUNTING > TAX REGION

Search

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		Yes
1004		Yes
1005		Yes
1006		Yes
1007		Yes
1008		Yes
1009		Yes
1010		Yes
1011		Yes
1012		Yes
1013		Yes
1014		Yes
1015		Yes
1016		Yes
1017		Yes

MAP AREA - TAX REGION: BLANCO ESD 1 BSLD

ZOOM TO SITES ZOOM TO MAP AREA HIDE SITES REMOVE SELECTED SHAPE

Map

Tax Rate

Pathway: Setup > Accounting > Tax Region > Tax Rate (tab)

After a Tax Region has been created, use the **Tax Rate** tab to add each tax it should include at a rate that applies.

TAX REGION SETUP SETUP > ACCOUNTING > TAX REGION

Search

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

Tax Rate

TAX	LEVEL	TYPE	RATE	START DATE
TEXAS STATE	Tax	Percentage %	6.25%	01/01/23
AUSTIN MTA			%	01/01/23
E TRAVIS COUNTY GATEWAY LIB D...			%	01/01/23

ADD / EDIT TAX RATE

TAX REGION: AUSTIN CITY-MTA-ETGW

TAX:

EFFECTIVE DATE:

RATE:

SAVE

Add/Edit Tax Rate Field Descriptions

Fields	Descriptions
Tax Region	Identifies the region the tax is for.
Tax	Identifies the tax assigned to the tax region.
Effective Date	Indicates the start date the tax is applicable. If an account is billed on a date that is before the taxes start date, the tax will not be applied.
Rate	Identifies the rate at which the account/site will be taxed.

Setup: Tax Rate

1. Select the Tax Region you would like to add a tax to.
2. Click the **green +** to open the Add/Edit Tax Rate Window.
 - o Select which **Tax** you would like to add to the Tax Region.
 - o Enter the **Start Date** the tax becomes applicable.
 - o Enter the **Rate** accounts will be taxed at for the tax.
3. Click **Save** when finished.