

# Tax Setup

Last Modified on 05/21/2024 12:58 pm EDT

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

## Tax

**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.

<b>Type</b>	Identifies how the tax is calculated in billing.
<b>GL Account</b>	Displays a list of available GL accounts. If a tax is related to a GL Account, select it here.
<b>Level</b>	Select 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>	Select the state administration that this tax applies too.
<b>Tax Authority Type</b>	Indicates the geographic or administrative regions the tax is specific to.
<b>Tax Authority Code</b>	Code that is used by the Tax Region for tax verification purposes.

### Add 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 setup procedures.
4. Click **Save** when finished.

## Tax Region

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

Tax Region Setup is used to identify the geographic area where a specific set of taxes apply. When the Tax Region is assigned to an account/site, the taxes it includes are applied to the account during billing.

The screenshot displays the 'TAX REGION SETUP' interface. At the top, there is a blue header with the title 'TAX REGION SETUP' and a breadcrumb path 'SETUP > ACCOUNTING > TAX REGION'. Below the header is a search bar and a refresh icon. The main area contains a table with the following columns: TAX REGION ID, NAME, MAP AREA, ERP LABEL, and ACTIVE. The table lists 12 existing tax regions. Overlaid on the table is a modal window titled 'ADD TAX REGION' with a question mark icon. The modal contains five input fields: TAX REGION ID (text), NAME (text), MAP AREA (dropdown), ERP LABEL (dropdown), and ACTIVE (dropdown). A 'SAVE' button is located at the bottom of the modal.

TAX REGION ID	NAME	MAP AREA	ERP LABEL	ACTIVE
1000	AUSTIN CITY-MTA-ETGW		12345	Yes
1001	BLANCO ESD 1 BSLD		12345	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

## 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.
Map Area	The geographic area of the tax region.
ERP Label	Label or ID for external ERP integration mapping.
Active	Controls if the tax region is available for selection in the Tax Region drop down field.

## Setup: Add Tax Region

1. Click the **green +** to to open the Add Tax Region tool
2. Complete the following required fields:
  - o Enter the **Tax Region ID**.
  - o Enter a **Name** for the Tax Region
  - o Select the **Active** status for the Tax Region.
3. Complete additional fields based on your company's setup procedures.
4. Click **Save** when finished.

## Tax Rate

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

The screenshot displays the 'Tax Rate' configuration page. At the top, there is a '+ Add' button. Below it is a table listing existing tax rates:

TAX	ERP LABEL	LEVEL	TYPE	RATE	START DATE	
TEXAS STATE		Tax	Percentage %	6.25%	01/01/23	⊖
COMAL COUNTY		Tax	Percentage %	0.5%	04/23/23	⊖
COMAL CANYON LL DIST		Tax	Percentage %	0.5%	01/01/23	⊖
COMAL CO ESD 4 CLLD		Tax	Percentage %	1%	01/01/23	⊖

An 'ADD / EDIT TAX RATE' modal is open, showing the following fields:

- TAX REGION: COMAL CO ESD 4 CLLD
- TAX: [Dropdown menu]
- ERP LABEL: [Text input]
- EFFECTIVE DATE: [Calendar icon]
- RATE: [Spinner]

A 'SAVE' button is located at the bottom of the modal.

## Add/Edit Tax Rate Field Descriptions

Fields	Descriptions
--------	--------------

<b>Tax Region</b>	Identifies the region the tax is for.
<b>Tax</b>	Identifies the tax assigned to the tax region.
<b>ERP Label</b>	Label or ID for external ERP integration mapping.
<b>Effective Date</b>	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.
<b>Rate</b>	Identifies the percentage the account/site is 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.
  3. Complete the following required fields: **These steps need to be updated as the fields changed.**
    - Select which **Tax** you would like to add to the Tax Region.
    - Select the ERP label if one applies.
    - Enter the **Start Date** the tax becomes applicable.
    - Enter the **Rate** accounts will be taxed at for the tax.
  4. Click **Save** when finished.
-