

Tax Class

Last Modified on 04/28/2026 8:59 am PDT

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

Tax Class Setup

Tax Class is a collection of taxes assigned to specific service codes, charge codes and surcharges. Creating a tax class involves two steps, adding a tax class and assigning tax class items. Before creating a tax class, verify all taxes it will include have been added to the system in [Setup](#) > [Accounting](#) > [Tax](#).

The screenshot displays the 'TAX CLASS SETUP' interface. At the top, there is a breadcrumb trail: 'SETUP > ACCOUNTING > TAX CLASS SETUP'. Below this, there is a search bar with a magnifying glass icon and a refresh icon. The main content area is divided into two sections. The first section, titled 'TAX CLASS SETUP', contains a table with the following data:

ID	NAME
1000	Equipment
1001	Labor
1002	Fee
1003	County Tax Only
1004	City Tax Only 2

The second section, titled 'Tax Class Items', also features a search bar and a refresh icon. It contains a table with the following data:

ID	TAX NAME	
1000	E TRAVIS COUNTY GATEWAY LIB DIST	<input type="checkbox"/>
1001	BLANCO COUNTY	<input checked="" type="checkbox"/>
1002	BLANCO CO ESD 1	<input checked="" type="checkbox"/>
1003	BLANCO CO S LIB DIST	<input type="checkbox"/>
1004	BLANCO CO ESD 2	<input type="checkbox"/>
1005	BUDA CITY	<input checked="" type="checkbox"/>
1006	CALDWELL COUNTY	<input type="checkbox"/>

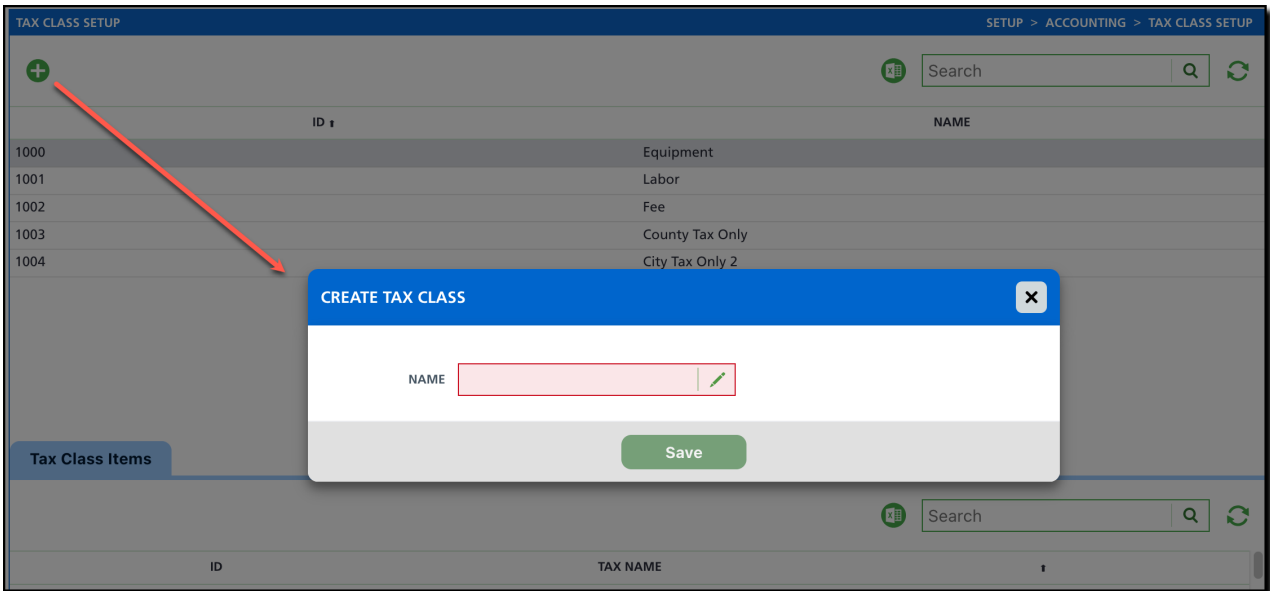
Permissions

The following permissions are required to view, add and edit tax class:

Permission ID	Permission Name
22	Setup \ Accounting

Create Tax Class

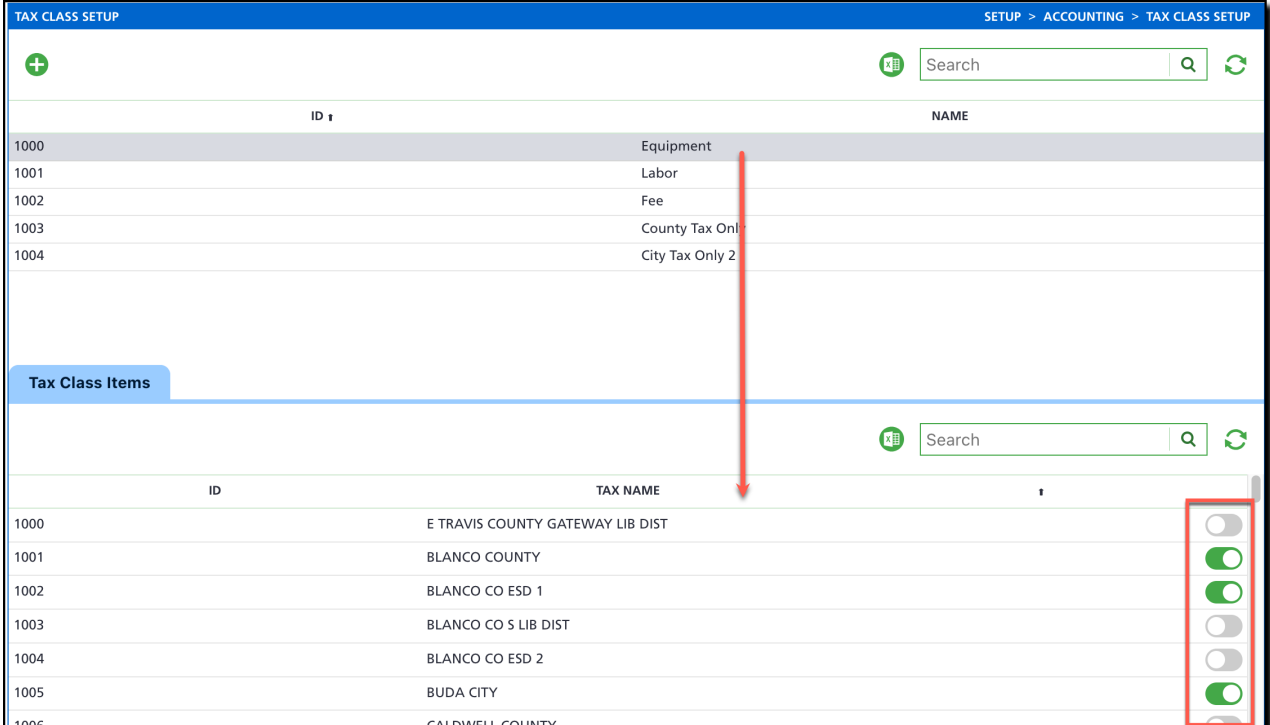
Simply put, a **Tax Class** is a container that groups together multiple taxes that can be applied to services. Once created, you can add taxes to the class and assign it to service codes, charge codes and surcharges.



1. Select the **green +** icon to display the Add Tax Class editor.
2. Enter the **Name** of the tax class.
3. Select **Save**.

Add Tax Class Items

Tax Class Items are the specific taxes created in *Setup > Accounting > Tax* that are assigned to a tax class, as shown here. A single tax item can be included in multiple Tax Classes.



1. Select the Tax Class from the upper grid to display a list of all available taxes in the **Tax Class Items** grid.
2. Use the toggle buttons to add or remove a Tax Class Item to a Tax Class.

Application of Use

The following areas are the locations a Tax Class can be applied for use.

Service Code Setup

UPDATE SERVICE CODE

Service Code | Surcharges

SERVICE CODE	FL10T	ACTIVE	Yes
NAME	10 Yard Trash Service	TRANSLATE 1	
LINE OF BUSINESS	Commercial	ENABLE ROUTING	Yes
EQUIPMENT TYPE	10 Yard FL (Ser)	REQUIRE FREQUENCY	Yes
MATERIAL TYPE	MSW	ENABLE DRIVER UPDATE	No
UOM	month	ENABLE ACCOUNT SIGNATURE	No
TAXABLE	Yes	CLASS	City Tax Only 2
GL ACCOUNT	Service Income:Comm	ENABLE DRIVER SIGNATURE	No
TEMPORARY SERVICE GL ACCOUNT		ENABLE RECURRING MINIMUM	No
PRORATION METHOD	Calendar Days - Start	ENABLE WORK ORDER MINIMUM	No
BILL WHILE ON CREDIT HOLD	No	ENABLE RENTAL FEE	No
IS AP TRANSACTION	No	ENABLE DEFAULT DESTINATION	No
		ENABLE NEGATIVE AMOUNT	No

Charge Code Setup

UPDATE CHARGE CODE

Charge Code | Surcharges | Default for Work Types

CHARGE CODE	FLBULK	ACTIVE	Yes
NAME	Bulk Pickup	TRANSLATE 1	
DOT DESCRIPTION		ENABLE NO CHARGE QUANTITY	No
LINE OF BUSINESS	Commercial	ENABLE NEGATIVE AMOUNT	No
EQUIPMENT TYPE		ENABLE MAX. WEIGHT CHARGE	No
MATERIAL TYPE	MSW	ESTIMATED AVERAGE WEIGHT	
RATE UOM	each	ENABLE MANUAL CHARGE	No
TAXABLE	Yes	CLASS	City Tax Only 2
GL ACCOUNT	Service Income:Comme	ENABLE MINIMUM	No
TEMPORARY SERVICE GL ACCOUNT		ENABLE VENDOR	No
TYPE	Service	ENABLE EST. CHARGE QUANTITY	No
WEIGHT CHARGE	No	PRICING MODEL	None
		BILL ZERO AMOUNT CHARGE	Yes

Surcharge Setup

ADD SURCHARGE ? ✕

NAME	<input type="text"/>	<input type="button" value="TRANSLATE"/>
SURCHARGE CLASS	<input type="text"/>	
TYPE	Percentage %	
GL ACCOUNT	<input type="text"/>	
TEMPORARY SERVICE GL ACCOUNT	<input type="text"/>	
TAXABLE	Yes	
TAX CLASS	<input type="text"/>	
EXCLUDE FROM REVENUE CALCULATION	City Tax Only 2	
FRANCHISE FEE	County Tax Only	
	Equipment	
	Fee	
	Labor	

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Related Articles

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