Tax Verification

Last Modified on 07/01/2025 7:22 am PDT

Pathway: Accounts > Tax Verification



The Tax Verification screen is used to ensure that addresses and their associated tax regions are accurate. This process is essential to accurately calculate and apply appropriate taxes to service transactions.

TAX VERIFICA	TION					ACCOUNTS > TAX VERIFICATION
DIVISION HOUSTON	SERV V PEA	ICE REGION RLAND MUNICIPAL	v		Search	0.⊗ €
Verified (5	51) Not Verified (1492)	Failed (3)	Address Not Found (0) Errors (1)			
VERIFY #	ALL					
ID	NAME 🕇	STATUS	ADDRESS	SALES REP	TAX REGION	VERIFICATION 个
45170020	<u>7 ELEVEN</u>	Active	1234Magnolia Pkwy Pearland, TX 77584-2062 US	House Acct non System	PEARLAND CITY	Verified 04/25/2023
43709001	Dominium Apartments	Active	1111 OAK RD PEARLAND, TX 77584-8815 US	House Acct non System	PEARLAND CITY	Verified 10/10/2023
43418001	<u>US Bank</u>	Active	2222 PEARLAND PKWY PEARLAND, TX 77581-5100 US	House Acct non System	PEARLAND CITY	Verified 10/10/2023
47498001	Call A PLUMBER	Active	3333 Broadway Street Pearland, TX 77581-9301 US	Janet Bettcher	PEARLAND CITY	Verified 10/10/2023
45650001	24 HOUR FITNESS	Active	4444 Broadway St Pearland, TX 77584-7873 Brazoria County US	House Account	PEARLAND CITY	Verified 10/10/2023
43684001	5555 Partner, LLC	Active	5555 PEARLAND PKWY PEARLAND, TX 77581-5362 US	House Acct non System	PEARLAND CITY	Verified 10/10/2023
45465001	6666BROADWAY LLC	Active	6666Broadway St Pearland, TX 77581-4307 US	House Account	PEARLAND CITY	Verified 10/10/2023
43525001	88 PEARS LLC	Active	7777 BROADWAY ST PEARLAND, TX 77581-3746 US	House Acct non System	PEARLAND CITY	Verified 10/10/2023

Permissions

The following permissions are required to view the Tax Verification screen and make adjustments to the tax settings for a site.

Permission ID	Permission Name
5	View Account
6	View Site
137	Edit Site Taxing
281	Edit Account Billing Settings
282	Edit Site Billing Settings
444	Tax Verification

Verify a Site's Tax Region

Individual Site Verification

1. Select any of the tabs to view the sites it includes.

- 2. Click on the site you would like to review and verify. This will open the Edit Site popup editor.
- 3. Click on the drop down for the Tax Region field and select the region that applies.
- 4. Select Save when finished. Upon Save, the system will auto-refresh count totals for the affected tab(s).

Verify All

- 1. Select the 'Not Verified' tab.
- 2. Click on the 'Verify All' button. This will trigger a Confirmation popup.
- 3. Continue with the Validation by selecting "OK," or select "Cancel" to close the Confirmation and stop the verification process.

Tax Verification Screen Tabs

The section below reviews each of the tabs displayed on the Tax Verification screen.

Verified

The "Verified" tab displays a list of all sites for which the tax region has been confirmed. When you access the Edit Site screen, this confirmation is represented by a green check mark next to the Tax Region.

Not Verified

The "Not Verified" tab displays a list of all sites that do not have a verified tax region. This is indicated with a grayed-out check mark on the Edit Site screen. From the 'Not Verified' screen users can individually click through and verify each site, or select the 'Verify All' button and the system will run the verification process in the background.

TAX VERIFICA	TION							ACCOUNTS > TAX VERIF	ICATION
DIVISION		SERVICE REGION							
HOUSTON		HOUSTON OPEN	MARKET -				Search	Q, (
Verified (1	0) Not Verified (4	86) Failed (2)	Address Not Fo	und (0)	Errors (0)				
VERIFY A	ALL								
ID	NAME 🕇	STAT	JS ADDRESS		SALES REP	TAX REGION	N	VERIFICATION 🕇	
48931008	1111 CORTLANDT ST	Acti	/e 1111 COR HOUSTON	TLANDT ST N, TX 77008	Matthew \	/an Doren		Not Verified	
48931007	2222 CORTLANDT ST	Acti	/e 2222 COR	TLANDT ST	Matthew	/an Doren		Not Verified	
48931099	1111 CORTLANDT ST	EDIT SITE Basic Settings Bill	na Settinas BIC Profile	Required C	apabilities		? ⊗	Not Verified	
48931069	3333 CORTLANDT ST	<u>,</u>						Not Verified	
49021017		NAME	1111 CORTLANDT ST		DIVISION	HOUSTON	*	Net Verified	
48931017	4444 CORTLANDT ST	NAME 2			SERVICE REGION	HOUSTON OPEN MARKET	· ·	Not vermed	
48931019	5555 CORTLANDT ST	ADDRESS LINE1 🖖	1111 CORTLANDT ST				• 0	Not Verified	
49021024		ADDRESS LINE 2	HOUSTON	TY = 77008	SOURCE	Existing Customer	- ©	Not Varified	
48951034	0000 CONTLANDI SI	PHONE 1	(999) 999-9999	Office v	SALES REP		•	Not vermed	
48931018	7777 CORTLANDT ST	PHONE 2	▼ (999) 999-9999		ADDITIONAL SERVICE MINUTES			Not Verified	
		OLD ID	MATT-44261				-		
		NOTE							
		WARNING ON OPEN							

Failed

If verification fails, the site will display in the 'Failed' tab. The total count of sites that have not succeeded in verifying their tax region will be shown in parentheses. Choose a site from the list to review and update the

Address Not Found

The "Address Not Found" tab shows sites with unlocatable addresses. Select a site from the list to review, update the information, and manually verify its tax region.

TAX	VERIFICATION								ACCOUNTS > TAX VERIFICATION
QA	DIVISION QAWASTE		SERVICE REGION QA Waste OPEN I	MARKET	•			Sea	arch Q 💿 🕃
Ve	rified (0)	Not Verified (12)	Failed (0)	Address N	lot Found (0)	Errors (0)			
V	/ERIFY ALL					-			
ID	NAM	E↑		STATUS	ADDRESS		SALES REP	TAX REGION	VERIFICATION 🕇

Errors

Sites will populate under the Errors tab for system encountered errors during the verification process. Select the site to open the Edit Site screen and manually verify the Tax Region.

TAX VERIFICA	ATION							ACCOUNTS >	TAX VERIFICATIO
DIVISION HOUSTON Verified (VERIFY)	0) Not V	SERVICE REG LOS ANGEL /erified (0) Failed (0	ION LES O) Address Not Four	nd (0) Er	rors (2)		[Search	Q 🛞 🕯
ID	NAME 🕇		STATUS	ADDRESS		SALES REP	TAX REGION	VERIFICATION	†
43236001	PEAR ORCH	ARD HOLDING	Active	11112222 Fa PEARLAND,	ake Street TX 77581-8922	John Briggs (Inactive)	ARANSAS PASS CITY- PASS DEV DIST-CRM	ARANSAS Error encoun CONT 10/17/2023	tered
48979001	Proration C	ustomer Test	Active	456 S Main S Houston, PA Washington	5t 15342-1832 County	House Acct non Syste	m	Error encoun 10/03/2023	tered
		EDIT SITE	Ţ	1			2 😣		
		Basic Settings Billin	ng Settings BIC Profile	Required C	apabilities	HOUSTON			
		NAME 2	Proration Customer Test				*		
		ADDRESS LINE 1	456 S Main St				- ©		
		ADDRESS LINE 2				x Failed Verification on 10/03/2023	- 0		
		CITY/STATE/POSTAL CODE	Houston P	A = 15342-1	SOURCE	ror encountered.	- 0		
		PHONE 1	• (999) 999-9999	Office 📼	SALES REP	House Acct non System	Ŧ		
		PHONE 2	▼ (999) 999-9999	-	SITE CLASS		- ©		
		OLD ID			GENERATOR	Not Applicable	- ©		
		PO#	LEED REPORTABLE]	STATE ID ADDITIONAL SERVICE MINUTE	:5			
		NOTE							