

Tax Verification

Last Modified on 02/22/2024 2:52 pm EST

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 VERIFICATION ACCOUNTS > TAX VERIFICATION

DIVISION: HOUSTON SERVICE REGION: PEARLAND MUNICIPAL

Verified (51) Not Verified (1492) Failed (3) Address Not Found (0) Errors (1)

VERIFY ALL

ID	NAME ↑	STATUS	ADDRESS	SALES REP	TAX REGION	VERIFICATION ↑
45170020	7 ELEVEN	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	US Bank	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 the 'Not Verified,' 'Failed,' 'Address Not Found' or 'Errors' tab.
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.

The screenshot displays the 'TAX VERIFICATION' screen. At the top, there are dropdown menus for 'DIVISION' (HOUSTON) and 'SERVICE REGION' (HOUSTON OPEN MARKET). Below these are buttons for 'Verified (10)', 'Not Verified (486)', 'Failed (2)', 'Address Not Found (0)', and 'Errors (0)'. A 'VERIFY ALL' button is also present. The main table lists sites with columns for ID, NAME, STATUS, ADDRESS, SALES REP, TAX REGION, and VERIFICATION. An 'EDIT SITE' modal window is open for site ID 48931091, showing fields for NAME, ADDRESS, CITY/STATE/POSTAL CODE, PHONE, and TAX REGION. The TAX REGION field is highlighted with a green checkmark, indicating it is verified. A red arrow points to the 'TAX REGION' field in the modal window.

ID	NAME	STATUS	ADDRESS	SALES REP	TAX REGION	VERIFICATION
48931091	222 4 CORTLANDT ST	Active	222 4 CORTLANDT ST HOUSTON, TX 77008-7060	Aliena Somers	HOUSTON CITY-HARRIS COUNTY HOUSTON MTA	Verified 10/10/2023
48931011	1111 CORTLANDT ST					Verified 04/20/2023
48960001	Anniva Smith					Verified 07/27/2023
48957001	McDonalds					Verified 07/14/2023
48957002	McDonalds2					Verified 07/14/2023
48972001	End Service.WO.Charges.Test					Verified 09/11/2023
48971001	JIRA_15618					Verified 09/08/2023

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 VERIFICATION ACCOUNTS > TAX VERIFICATION

DIVISION: HOUSTON SERVICE REGION: HOUSTON OPEN MARKET

Verified (10) **Not Verified (486)** Failed (2) Address Not Found (0) Errors (0)

VERIFY ALL

ID	NAME ↑	STATUS	ADDRESS	SALES REP	TAX REGION	VERIFICATION ↑
48931008	1111 CORTLANDT ST	Active	1111 CORTLANDT ST HOUSTON, TX 77008	Matthew Van Doren		Not Verified
48931007	2222 CORTLANDT ST	Active	2222 CORTLANDT ST	Matthew Van Doren		Not Verified
48931099	1111 CORTLANDT ST					Not Verified
48931069	3333 CORTLANDT ST					Not Verified
48931017	4444 CORTLANDT ST					Not Verified
48931019	5555 CORTLANDT ST					Not Verified
48931034	6666 CORTLANDT ST					Not Verified
48931018	7777 CORTLANDT ST					Not Verified

EDIT SITE

Basic Settings | Billing Settings | BIC Profile | Required Capabilities

NAME: 1111 CORTLANDT ST DIVISION: HOUSTON

NAME 2: SERVICE REGION: HOUSTON OPEN MARKET

ADDRESS LINE 1: 1111 CORTLANDT ST TAX REGION:

ADDRESS LINE 2: ORIGIN:

CITY/STATE/POSTAL CODE: HOUSTON TX 77008 SOURCE: Existing Customer

PHONE 1: (999) 999-9999 Office SALES REP:

PHONE 2: (999) 999-9999 ADDITIONAL SERVICE MINUTES:

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 information and manually verify its tax region.

TAX VERIFICATION ACCOUNTS > TAX VERIFICATION

DIVISION: HOUSTON SERVICE REGION: HOUSTON OPEN MARKET

Verified (12) Not Verified (485) **Failed (2)** Address Not Found (0) Errors (0)

VERIFY ALL

ID	NAME ↑	STATUS	ADDRESS	SALES REP	TAX REGION	VERIFICATION ↑
48931006	1234 CORTLANDT ST	Active	1234 CORTLANDT ST HOUSTON, TX 77008-7060 US	Aliena Somers	BEXAR SA MTA ESD 6	Failed Verification 10/10/2023
48976001	Unmatched Default Account	Active	123 Main St Houston, TX 77002-1037 Harris County US	House Account	ALAMO HEIGHTS CITY	Failed Verification 09/14/2023

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

DIVISION: QA WASTE SERVICE REGION: QA Waste OPEN MARKET

Verified (0) Not Verified (12) Failed (0) **Address Not Found (0)** Errors (0)

VERIFY ALL

ID	NAME ↑	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 VERIFICATION ACCOUNTS > TAX VERIFICATION

DIVISION: HOUSTON SERVICE REGION: LOS ANGELES

Verified (0) Not Verified (0) Failed (0) Address Not Found (0) **Errors (2)**

VERIFY ALL

ID	NAME ↑	STATUS	ADDRESS	SALES REP	TAX REGION	VERIFICATION ↑
43236001	PEAR ORCHARD HOLDING	Active	11112222 Fake Street PEARLAND, TX 77581-8922	John Briggs (Inactive)	ARANSAS PASS CITY-ARANSAS PASS DEV DIST-CRM CONT	Error encountered 10/17/2023
48979001	Proration Customer Test	Active	456 S Main St Houston, PA 15342-1832 Washington County	House Acct non System		Error encountered 10/03/2023

EDIT SITE

Basic Settings Billing Settings BIC Profile Required Capabilities

NAME: Proration Customer Test

NAME 2:

ADDRESS LINE 1: 456 S Main St

ADDRESS LINE 2:

CITY/STATE/POSTAL CODE: Houston PA 15342-1

PHONE 1: (999) 999-9999 Office

PHONE 2: (999) 999-9999

OLD ID:

PO#:

SIGNATURE REQUIRED: LEED REPORTABLE:

NOTE:

DIVISION: HOUSTON

SERVICE REGION: LOS ANGELES

TAX REGION: **?**

ORIGIN:

SOURCE:

SALES REP: House Acct non System

SITE CLASS:

GENERATOR: Not Applicable

EPA:

STATE ID:

ADDITIONAL SERVICE MINUTES:

Tax Failed Verification on 10/03/2023
Error encountered.