

# Tax Region Setup

Last Modified on 04/28/2026 9:04 am PDT

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

The **Tax Region Setup** screen defines geographic areas where specific tax sets apply to a site such as state and local county taxes. When a tax region is assigned to a 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 and will apply the tax region based on the customer's address.

The screenshot shows the 'TAX REGION SETUP' interface. At the top, there is a blue header with a plus icon on the left and a search bar on the right. Below the header is a table with columns for 'TAX REGION ID', 'NAME', and 'ACTIVE'. The table lists 13 tax regions, each with a unique ID, a name, and an 'ACTIVE' status of 'Yes'. To the right of each row is a red circular icon with a white person silhouette. Below the table is a blue button labeled 'Tax Rate'. Underneath the button is another table with columns for 'TAX', 'LEVEL', 'TYPE', 'RATE', and 'START DATE'. A plus icon is visible to the left of this second table.

| 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    |
| 1012          | FAYETTE COUNTY       | Yes    |
| 1013          | GONZALES COUNTY      | Yes    |

| TAX | LEVEL | TYPE | RATE | START DATE |
|-----|-------|------|------|------------|
|-----|-------|------|------|------------|

## Permissions

The following permissions are required to create tax regions:

| Permission ID | Permission Name    |
|---------------|--------------------|
| 22            | Setup \ Accounting |
| 435           | Tax Region Map     |

## Logic

The following logic applies to tax region use after regions have been established:

### Online Order and Quick Order Entry

- When assigning a tax region to a newly created site, the system will automatically assign a tax region based on the current geocoded map area.

## Prerequisites

Before creating a tax region, confirm taxes have already been established in [Setup > Accounting > Tax](#). Further information on Tax Setup can be reviewed here: [Tax Setup](#)

| TAX SETUP |                                  |              |                   |       |         |  |
|-----------|----------------------------------|--------------|-------------------|-------|---------|--|
| ID ↑      | NAME                             | TYPE         | GL ACCOUNT        | LEVEL | TAXABLE |  |
| 1000      | E TRAVIS COUNTY GATEWAY LIB DIST | Percentage % | Sales Tax Payable | Tax   | Yes     |  |
| 1001      | BLANCO COUNTY                    | Percentage % | Sales Tax Payable | Tax   | Yes     |  |
| 1002      | BLANCO CO ESD 1                  | Percentage % | Sales Tax Payable | Tax   | Yes     |  |
| 1003      | BLANCO CO 5 LIB DIST             | Percentage % | Sales Tax Payable | Tax   | Yes     |  |
| 1004      | BLANCO CO ESD 2                  | Percentage % | Sales Tax Payable | Tax   | Yes     |  |
| 1005      | BUDA CITY                        | Percentage % | Sales Tax Payable | Tax   | Yes     |  |
| 1006      | CALDWELL COUNTY                  | Percentage % | Sales Tax Payable | Tax   | Yes     |  |
| 1007      | CALDWELL HAYS ESD 1A             | Percentage % | Sales Tax Payable | Tax   | Yes     |  |
| 1008      | COMAL COUNTY                     | Percentage % | Sales Tax Payable | Tax   | Yes     |  |
| 1009      | COMAL CO ESD 7                   | Percentage % | Sales Tax Payable | Tax   | Yes     |  |
| 1010      | COMAL CO ESD 6                   | Percentage % | Sales Tax Payable | Tax   | Yes     |  |
| 1011      | COMAL ESD 3 CLLD                 | Percentage % | Sales Tax Payable | Tax   | Yes     |  |
| 1012      | COMAL CANYON LL DIST             | Percentage % | Sales Tax Payable | Tax   | Yes     |  |
| 1013      | COMAL CO ESD 4 CLLD              | Percentage % | Sales Tax Payable | Tax   | Yes     |  |
| 1014      | DRIPPING SPRINGS CITY            | Percentage % | Sales Tax Payable | Tax   | Yes     |  |
| 1015      | HAYS COUNTY                      | Percentage % | Sales Tax Payable | Tax   | Yes     |  |
| 1016      | DRIPPING SPGS LIB DIS            | Percentage % | Sales Tax Payable | Tax   | Yes     |  |

## Create a Tax Region

### Add Tax Region

To add a new tax region, click the green 'add' icon, enter a Tax Region ID and Name, and set Active to 'Yes' to make it available for use. After a tax region has been added, it will display on the screen in alphanumeric order by Tax Region ID.

| TAX REGION SETUP |                      |
|------------------|----------------------|
| TAX REGION ID    | NAME                 |
| 1000             | AUSTIN CITY-MTA-ETGW |
| 1001             | BLANCO ESD 1 BSLD    |
| 1002             | BLANCO CO ESD 2 BSLD |
| 1003             |                      |
| 1004             |                      |
| 1005             |                      |
| 1006             |                      |
| 1007             |                      |
| 1008             |                      |
| 1009             |                      |
| 1010             |                      |
| 1011             |                      |
| 1012             | FAYETTE COUNTY       |

ADD TAX REGION
?
✕

TAX REGION ID

NAME

ACTIVE

### Geocode a Tax Region - Map Area

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. Multiple perimeters can be defined for a single tax region.

- **Green icon:** Indicates the service region includes a mapped boundary.
- **Red icon:** Indicates the service region has **no** mapped boundaries.

The screenshot shows the 'TAX REGION SETUP' interface. At the top, there's a search bar and a refresh icon. Below is a table with columns for 'TAX REGION ID', 'NAME', and 'ACTIVE'. The table lists several tax regions, including 'AUSTIN CITY-MTA-ETGW' and 'BLANCO ESD 1 BSLD'. A red arrow points to the 'ACTIVE' column for 'BLANCO ESD 1 BSLD', which has a red icon. Below the table is a map editor for 'BLANCO ESD 1 BSLD'. The map shows a city area with a black polygon drawn around a specific region. The map editor has buttons for 'ZOOM TO SITES', 'ZOOM TO MAP AREA', 'HIDE SITES', and 'REMOVE SELECTED SHAPE'. At the bottom of the map editor are 'IMPORT' and 'SAVE' buttons.

| TAX REGION ID | NAME                 | ACTIVE |
|---------------|----------------------|--------|
| 1000          | AUSTIN CITY-MTA-ETGW | Yes    |
| 1001          | BLANCO ESD 1 BSLD    | Yes    |
| 1002          |                      | 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    |
| 1018          |                      | Yes    |
| 1019          |                      | Yes    |

1. Click on the **perimeter icon** at the top of the map screen to turn your cursor into a perimeter mapping tool.
2. Draw a perimeter around the area by left-clicking to set each anchor point. The perimeter is complete when fully enclosed.
  - Continue this process if more than one geographic grouping exists for a tax region.
3. Click **Save** when finished and the Map Area popup editor will close. The map icon on the Tax Region Setup screen will now display green.

## Add Tax Rate

After a tax region is created, applicable taxes and their rates are added under the Tax Rate tab. Tax rates can be updated or removed as needed.

**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          |                      | Yes    |  |
| 1006          |                      | Yes    |  |
| 1007          |                      | Yes    |  |
| 1008          |                      | Yes    |  |
| 1009          |                      | Yes    |  |
| 1010          |                      | Yes    |  |
| 1011          |                      | Yes    |  |
| 1012          |                      | Yes    |  |
| 1013          |                      | Yes    |  |

**ADD / EDIT TAX RATE** ? X

TAX REGION: BLANCO CO ESD 2 BSLD

TAX:

EFFECTIVE DATE:

RATE:

**Tax Rate**

| TAX                  | LEVEL | TYPE         | RATE  | START DATE |  |
|----------------------|-------|--------------|-------|------------|--|
| TEXAS STATE          | Tax   | Percentage % | 6.25% | 01/01/23   |  |
| BLANCO COUNTY        | Tax   | Percentage % | 0.5%  | 01/01/23   |  |
| BLANCO CO S LIB DIST | Tax   | Percentage % | 0.5%  | 01/01/23   |  |
| BLANCO CO ESD 2      | Tax   | Percentage % | 1%    | 01/01/23   |  |

1. Select a Tax Region from the upper grid.
  - If this is a previously existing tax region, the taxes it includes display in the lower grid.
  - For a new tax region, the lower grid will remain empty until taxes are added.
2. In the lower grid, select the green 'add' icon to add a new tax rate. This will display the **Add / Edit Tax Rate** popup editor.
3. Select a tax from the **Tax** drop down.
4. Enter the **Effective Date** when the tax becomes applicable.
5. Enter a **Rate** for the tax.
  - This can be edited at a later time by clicking within the Rate column for the tax.
6. Click **Save** when finished.

## Related Articles

[Tax Setup](#)

[Tax Class](#)