

# Tax Region Setup

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

The Tax Region Setup screen defines geographic areas where specific tax sets apply. When a tax region is assigned to an account or 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.

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
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## 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.

The screenshot shows the 'TAX REGION SETUP' interface. At the top, there is a blue header with a green plus icon. Below it is a table with columns 'TAX REGION ID' and 'NAME'. The table lists several existing tax regions, including 'AUSTIN CITY-MTA-ETGW', 'BLANCO ESD 1 BSLD', 'BLANCO CO ESD 2 BSLD', and 'FAYETTE COUNTY'. A modal window titled 'ADD TAX REGION' is open in the foreground, featuring three input fields: 'TAX REGION ID', 'NAME', and 'ACTIVE' (a dropdown menu). A green 'SAVE' button is located at the bottom of the modal. A red arrow points from the green plus icon in the header to the modal window.

### 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 is 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 green icon. Below the table is a map area editor for 'BLANCO ESD 1 BSLD'. The map shows a city map of Houston with a black perimeter drawn around a specific area. 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**

TAX REGION: BLANCO CO ESD 2 BSLD

TAX:

EFFECTIVE DATE:

RATE:

**SAVE**

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](#)