

# SedonaSetup - AR - Tax Groups

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A Tax Group is linked to one or more Tax Tables and is assigned to a Customer's Site. By default, the tax-ability of items invoiced is **determined by the Tax Group assigned to the Site record**. The Tax Group defaulting into an Invoice or Credit Memo may be overridden on an individual basis if necessary.

There are four separate setup forms [tabs] in the Tax Group setup, each of which will be described below.

## Taxes Tab

First create the Taxing Group; enter up to 25 characters into the Taxing Group field, then press the tab key on your keyboard to move to the Description field. The Description will auto-fill with the same information entered into the Taxing Group field; you may modify this if desired.

Next link the appropriate Tax Table codes to the Taxing Group by checking the box to the left of each Tax Code (tax table) in the lower tier of the form. When finished, click the Apply button to save. Repeat these steps until all Tax Groups needed have been created.

The screenshot shows the 'Tax Groups' window with the 'Taxes' tab selected. The 'Tax Groups List' table is visible, and the 'Include Inactive' checkbox is unchecked. The 'Taxes' sub-form is active, showing the 'Taxing Group' and 'Description' fields both containing 'Daphne'. Below this is a table of tax codes with checkboxes for selection.

Tax Code	Description	Rate	
<input checked="" type="checkbox"/>	Alabama	9	
<input checked="" type="checkbox"/>	Madison County	Madison County	8.5
<input checked="" type="checkbox"/>	Daphne	Daphne	9.5
<input type="checkbox"/>	.87542	.87542	0
<input type="checkbox"/>	sat 5000	sat 5000	7.235
<input type="checkbox"/>	8.0	SC Darlington County	0
<input type="checkbox"/>	Al State	Al State	6.5
<input type="checkbox"/>	AT Zero in tax & non-tax	AT Zero in tax & non-tax	0
<input type="checkbox"/>	Canton City Tax	Canton City Tax	2

## US Geo Linking Tab

Using the US Geo Linking is optional, however, it makes the chore of selecting the correct Tax Group for a Site effortless. There is a bit of setup involved, but once put in place, the User should not have to decide which Tax Group to select when setting up a new Site.

The Tax Group Geo Linking form is designed to link a Tax Group to a method of how sales tax is determined and reported for the jurisdiction; this is referred to as the Geo Taxing Level.

Depending on the Geo Taxing Level assigned to each State in the Geographic setup table (State), fields will be displayed on the US Geo Linking form to validate information which is used to default the appropriate Tax Group when creating a Site. There are eight pre-defined Geo Taxing Levels from which you would select; these are:

- None
- State
- Postal Code Only
- County Only
- City Only
- County + Postal Code
- City + Postal Code

- City + County

When a new Site is created, depending Geo Taxing Level, once the Site Address information has been entered, the application will attempt to fill in the appropriate Tax Group and Cycle Tax Group into the Site setup form. If the application does not find a Tax Group with the matching criteria from the Site Address information, the Tax Groups will default to the company's default Tax Group (SedonaSetup/Data Entry Defaults CM).

### Example #1: City + County Geo Linking

The following is an example of how to use the Tax Group Geo Linking for **City + County**.

We will be working with the state of Alabama.

Alabama requires that sales tax is reported by County and each City within a given County. Since the lowest level of reporting is the City, this is how we should set up our Tax Groups.

The below Tax Group is for the City of Daphne.

The screenshot shows the 'Tax Groups' application window. At the top, there is a 'Tax Groups List' table with columns for Tax Group, Description, Group Rate, and Inactive. The 'Daphne' group is highlighted. Below this, there are tabs for 'Taxes', 'US Geo Linking', 'Group Rate Setup', and 'Product Lines'. The 'Taxes' tab is active, showing a 'Taxing Group' and 'Description' both set to 'Daphne'. Below this is a table of tax codes with checkboxes. The 'Alabama' checkbox is checked, and the 'Daphne' checkbox is also checked. At the bottom, there are 'Apply', 'New', and 'Delete' buttons.

Tax Group	Description	Group Rate	Inactive
Daphne	Daphne	N	N
Parrotte	Parrotte	N	N
FL - County Tax	FL - County Tax	N	N
Florida State Tax	Florida State Tax	N	N
MI	MI	N	N
MI-Exempt	MI-Exempt	N	N
MI-Oakland County	MI-Oakland County	N	N
MI Tax Exempt	MI Tax Exempt	N	N

Tax Code	Description	Rate
<input checked="" type="checkbox"/> Alabama	Alabama	2
<input checked="" type="checkbox"/> Baldwin County	Baldwin County	4
<input checked="" type="checkbox"/> Daphne	Daphne	9.5
<input type="checkbox"/> .87542	.87542	0
<input type="checkbox"/> 1st 5000	1st 5000	7.235
<input type="checkbox"/> 8.0	SC Darlington County	0
<input type="checkbox"/> AL State	AL State	6.5
<input type="checkbox"/> AT Zero in tax & non-tax	AT Zero in tax & non-tax	0
<input type="checkbox"/> Canton City Tax	Canton City Tax	2

After the Tax Group(s) have been set up, we need to assign a Geo Taxing Level on the State setup.

### State Setup

Within SedonaSetup, navigate to the Geographic Tables option, then click on the United States at the bottom of the list of countries.

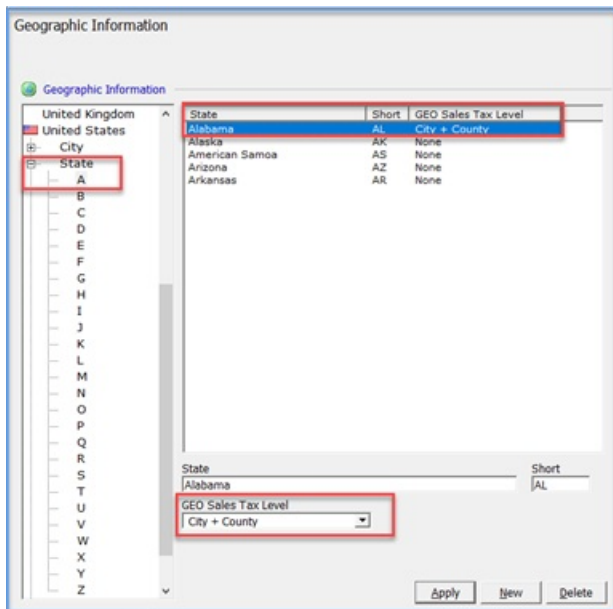
A tree of five options will be displayed; click on the State option.

Next click on the letter corresponding to the first letter of the State you want to work with.

In the example below we clicked on the letter A, which now displays a list of all States that begin with the letter A; we will select Alabama from the list.

In the lower tier of the form select the GEO Sales Tax Level from the drop-down list; we will be selecting **City + County**.

Click the Apply button when finished.

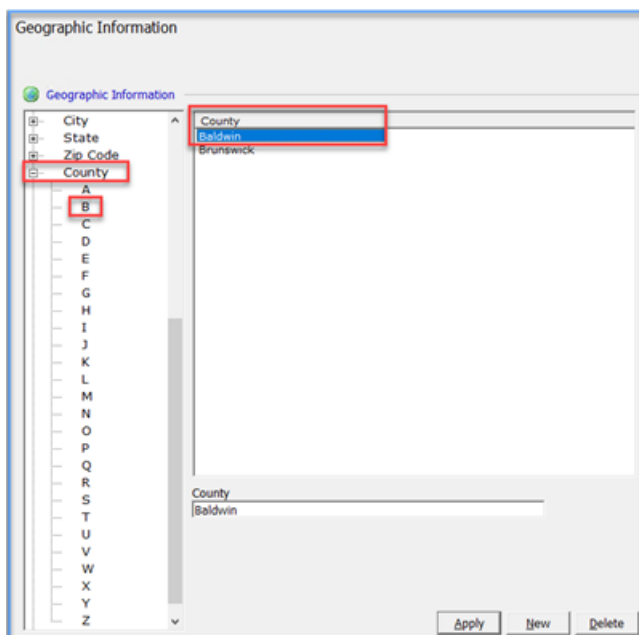


### County Setup

Since Alabama requires reporting of tax at the County and City level, we need to make certain all the Counties within Alabama where you do business are entered into the County setup table.

From the Geographic Tables tree, select the Counties option.

For this example we are going to select "B" and enter Baldwin County. Select Apply.



### Tax Group Setup

Now we will link the Tax Group to the same Geo Taxing Level as was selected for the State [in the Geographic setup table].

Navigate to Tax Groups in SedonaSetup and select the appropriate Tax Group. In this example we will select Daphne.

Select the US Geo Linking tab, and then select the Geo Taxing Level of **City + County** option.

This will open two new fields; County and City.

For this scenario, select Baldwin in the drop down for the County and enter Daphne for the City.

Click the Apply button when finished.

**Tax Groups**

Tax Groups List

Tax Group	Description	Group Rate	Inactive
Daphne	Daphne	N	N
Fairhope	Fairhope	N	N
FL - County Tax	FL - County Tax	N	N
Florida State Tax	Florida State Tax	N	N
MI	MI	N	N
MI-Exempt	MI-Exempt	N	N
MI-Oakland County	MI-Oakland County	N	N
MI-Texas County	MI-Texas County	N	N

Include Inactive

Taxes: **US Geo Linking** | Group Rate Setup | Product Lines

**Daphne-Daphne**

GEO Taxing Level: City + County

County: Baldwin

City: Daphne

Apply New Delete

Below we will see how this setup affects the populating of the Tax Group fields on the Site setup form.

When creating a new Customer or new Site for an existing Customer, the Site address auto-fills with the primary billing address of the Customer.

In this example, the Bill To address for this Customer is in Mobile, AL. Therefore, the Site auto-fills with the Mobile address and the Tax Groups associated with Mobile.

The Site Address needs to be changed to the City of Daphne and since the GEO Taxing Level for the City of Daphne is set to **City + County**, you will need to enter Daphne for the City and select Baldwin from the drop-down list in the County field. Select Save.

Once the Save button is clicked on the Edit Address form, the appropriate Tax Group will fill into the Tax Group and Cycle Tax Group fields. In this example: Daphne.

Select Save on the Site Edit Screen.

50832 New Site

Customer # 50832  
Name Kathleen Kelly  
Kathleen Kelly  
123 Daffodil Lane  
Mobile, AL 36609

Site | Custom Fields | Systems | Jobs | Contacts | Invoices | Service Tickets | Items

Site Name and Address  
 Residential  Commercial  
 Site Number 2  
 Site Name Kathleen Kelly  
 Add'l Name  
 Address... 234 Sunflower Lane  
 Daphne, AL 36526  
 Phone 1  
 Phone 2  
 Fax  
 Copy Site Address to Billing

Site Information  
 Branch Alabama  
 Cross Street  
 Map Code  
 Customer Since 5/1/2026

Tax Information  
 Tax Group Daphne  
 Alabama 2.0%  
 Baldwin County 4.0%  
 Daphne 9.5%  
 Cycle Tax Group Daphne  
 Alabama 2.0%  
 Baldwin County 4.0%  
 Daphne 9.5%  
 Tax Exempt #

Inactive Save Apply Close

## Example #2: County Only Geo Linking

The following is an example of how to use the Tax Group Geo Linking for **County Only**.

We will be working with the state of Georgia.

Since the level of reporting is **County Only**, the Tax Groups should be set up for each County you will be doing business in.

### State Setup

Navigate to the Geographic Tables option in SedonaSetup, then click on the United States at the bottom of the list of countries.

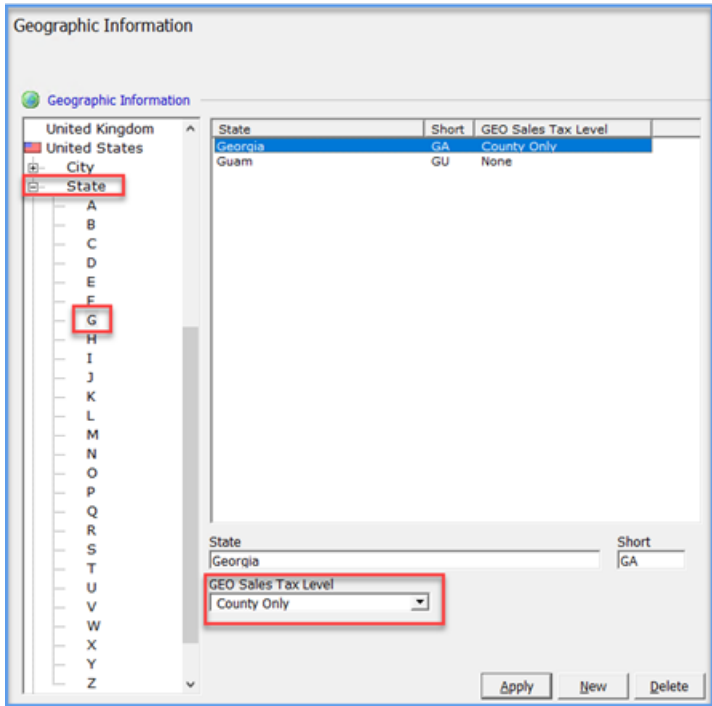
A tree of five options will be displayed; click on the State option.

Next click on the letter corresponding to the first letter of the State you want to work with.

In the example below we clicked on the letter G, which now displays a list of all States that begin with the letter G; we will select Georgia from the list.

In the lower tier of the form select the GEO Sales Tax Level from the drop-down list; we will be selecting **County Only**.

Click the Apply button when finished.

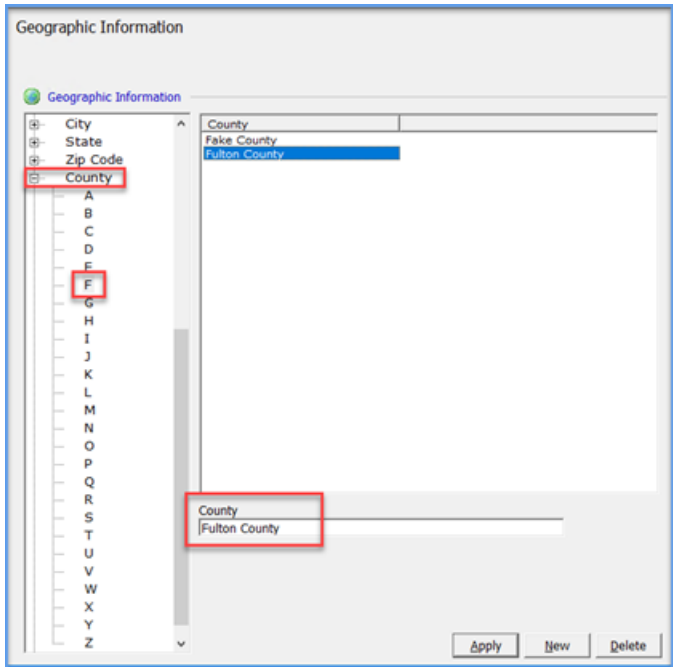


**County Setup**

Since Georgia requires reporting of tax at the County level, we need to make certain all the Counties within Georgia where you do business are entered into the County setup table.

From the Geographic Tables tree, select the Counties option.

For this example we are going to select "F" and enter Fulton County. Select Apply.



**Tax Group Setup**

Now we will link the Tax Group to the same Geo Taxing Level as was selected for the State [in the Geographic setup table].

Navigate to Tax Groups in SedonaSetup and select the appropriate Tax Group. In this example we will select Fulton County.

On the US Geo Linking tab, we will select the Geo Taxing Level of **County Only** option.

This will open two new fields; State and County.

Select Georgia from the State drop-down and select Fulton in the County drop-down.

Click the Apply button when finished.

**Tax Groups**

Tax Groups List

Tax Group	Description	Group Rate	Inactive
Daphne	Daphne	N	N
Fairhope	Fairhope	N	N
FL - County Tax	FL - County Tax	N	N
Florida State Tax	Florida State Tax	N	N
Fulton County	Fulton County	N	N
MI	MI	N	N
MI-Exempt	MI-Exempt	N	N
MI-Exempt County	MI-Exempt County	N	N

Include Inactive

Taxes: **US Geo Linking** | Group Rate Setup | Product Lines |

**Fulton County-Fulton County**

GEO Taxing Level: County Only

State: Georgia

County: Fulton County

Apply | New | Delete

Below we will see how this setup affects the populating of the Tax Group fields on the Site setup form.

In this example, the Bill To address for this Customer is in Mobile, AL. Therefore, the Site auto-fills with the Mobile address and the Tax Groups associated with Mobile.

**50832 New Site**

Customer # 50832  
Name Kathleen Kelly  
Kathleen Kelly  
123 Daffodil Lane  
Mobile, AL 36609

Site | Custom Fields | Systems | Jobs | Contacts | Invoices | Service Tickets | Items

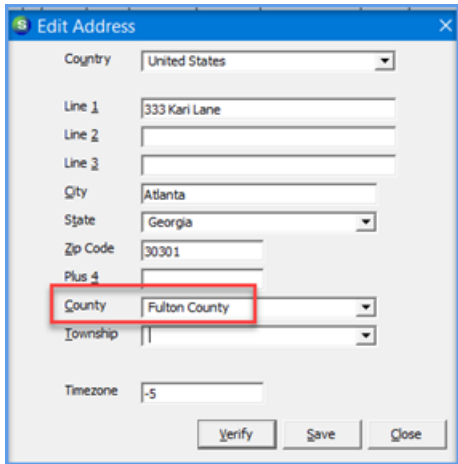
Site Name and Address: Residential | Commercial | Site Information: Branch Alabama

Site Number 2  
Site Name Kathleen Kelly  
Address... 123 Daffodil Lane, Mobile, AL 36609  
Phone 1  
Phone 2  
Fax  
 Copy Site Address to Billing

Tax Information: Tax Group Mobile  
Alabama 2.0%  
Mobile City 8.0%  
Mobile County 9.0%  
Cycle Tax Group Mobile  
Alabama 2.0%  
Mobile City 8.0%  
Mobile County 9.0%  
Tax Exempt #

Inactive | Save | Apply | Close

The Site Address needs to be changed to Atlanta, GA and since the GEO Taxing Level for Fulton County is set to **County Only**, you will need to select the Fulton County from the drop-down list in the County field. Select Save.



The screenshot shows a window titled "Edit Address" with the following fields and values:

- Country: United States
- Line 1: 333 Kari Lane
- Line 2: (empty)
- Line 3: (empty)
- City: Atlanta
- State: Georgia
- Zip Code: 30301
- Plus 4: (empty)
- County: Fulton County (highlighted with a red box)
- Township: (empty)
- Timezone: -5

Buttons at the bottom: Verify, Save, Close.

Once the Save button is clicked on the Edit Address form, the appropriate Tax Group will fill into the Tax Group and Cycle Tax Group fields. In this example: Fulton County. Select Save on the Site Edit Screen.

### Group Rate Setup Tab

This form is used by one specific SedonaOffice customer; do not use this option unless you have been instructed to do so by your SedonaOffice Trainer or a SedonaOffice Support Representative.

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### Product Lines Tab

This form would only be used if you want to use a specific Invoice Item for a specific Part Product Line when invoicing a Customer for Inventory Parts; this would be for any type of Invoice - Miscellaneous, Job, or Service.

**Before setting up any information in this form, consult with a SedonaOffice Support Representative to discuss the ramifications of using this option.**

To use this feature:

1. Click on the New button at the lower right of the Product Lines form.
2. Select a Product Line from the drop-down list.
3. Select the Invoice Item to be used from the drop-down list.
4. Type in a Description; text entered into this field will only print on one particular custom invoice.
5. Click the Apply button when finished.

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