Description

Overwrite Tax Rules

The "**Overwrite Tax Rules**" extension allows you to overwrite and configure tax rules in WHMCS in a highly flexible manner, without relying on the standard WHMCS tax rules. It offers the following key features:

1. Multiple Home Companies: You can configure separate parameters for each home company, including company name, country, tax ID/VAT number, tax name, tax rate, pay-to text, proforma invoice numbering, and invoice numbering. These home companies are used in tax rules and when creating client invoices, providing a convenient way to create multi-brands in the financial aspect of WHMCS.
2. Country Sets: These are groups of countries that participate in tax rule settings.
3. Tax Rules: These rules have parameters for filtering and applying to client invoices. You can specify the client's country or a set of countries to which the rule should apply, the client type (private client, company without VAT ID, company with VAT ID), the home company that will serve the client. You can also set an individual tax rate and tax name to be used on the invoice; otherwise, the parameters from the home country will be used.
4. Freeze Client and Home Company Data: The extension fully supports freezing client and home company data on invoices. This means that the data on the invoice will not change if the client modifies it in their profile. However, administrators have the ability to modify these data.
5. VIES VAT Number Validation: The extension includes built-in support for validating VAT numbers through VIES (VAT Information Exchange System) in the following scenarios: validation when registering a client, validation when editing a client, validation when creating an order, and manual validation.
6. Client Overview Widget: The admin area includes a widget that displays information about the client, such as client type, home company, tax rule number, VIES status (valid) and last validation date, and tax exemption.
7. Invoice Editing: When editing an invoice, a section is added that displays the current and frozen data of the client and home company.
8. PDF Invoice Customization: The extension provides a small integration code for adapting the PDF invoice template.

The "Overwrite Tax Rules" extension fulfills a wide range of invoicing and multi-brand needs that

are not achievable through standard WHMCS configuration. Furthermore, this extension is available for free compared to well-known competing modules.

Configuration

Add to top "invoicepdf.tpl"

```
# PUQ Customization - OverwriteTaxRules - Integration Code
if(file_exists(ROOTDIR . '/modules/addons/puq_customization/extensions/OverwriteTaxRules/lib/invoicepdf.php')){
    require_once(ROOTDIR . '/modules/addons/puq_customization/extensions/OverwriteTaxRules/lib/invoicepdf.php');
    foreach(puq_customization_overwrite_tax_rules_invoicepdf($tplvars) as $k=>$v) $$k = $v;
}
```

Enabled	YES	Enable or disable all custom functions.
Client VAT ID field	● Use standard VAT ID field	
	○ Use custom VAT ID field NIP	
Freeze Data	YES	Freeze customer and home company data on invoices.
Set Invoice Date on Payment	YES	Set the invoice date to the current date upon payment.
Set Invoice Due Date on Payment	YES	Set the invoice due date to the current date upon payment.

VIES VAT number validation	YES	Enable support for VIES VAT number verification, for B2B tax exemption. Enabling this option will change the default tax exemption option to none (not exempt) on all clients.
Validation when registering a client	YES	
Validation when edit a client	YES	
Validation when creating order	YES	

Save Changes

Home companies

Company name	PL-PUQ sp. z o.o.
	☑ Default
Country	PL - Poland
Your Tax ID/VAT Number	PL5252834345
Tax name	PL-VAT
Tax rate	23.000 % Supports up to 3 decimals

Numbering

☑ Proforma invoice numbering — Proforma invoice numbering format: PL-VAT-PRO-{NUMBER} Available Tags: {YEAR} {MONTH} {DAY} {NUMBER}

☑ Invoice numbering — Invoice numbering format: PL-VAT-FA-{NUMBER} Available Tags: {YEAR} {MONTH} {DAY} {NUMBER}

Next proforma invoice number: 7 — Proforma invoice auto reset numbering: Annually

Next invoice number: 1 — Invoice auto reset numbering: Annually

Pay to text
```
PL-PUQ sp. z o.o.
PL-VAT: 5252834345
PL-VAT-UE: PL5252834345
Adres: ul. Szczęsna 26,
02-454 Warszawa
```
This text is displayed on the invoice as the Pay To details

Save Changes   **Delete Company**

Add new Company

ID	Company name	Default	Tax id	Tax name Tax rate	Country	Proforma invoice numbering	Invoice numbering	Pay to text
1	PL-PUQ sp. z o.o.	☑	PL5252834345	PL-VAT 23.000%	PL - Poland	☑ Format: PL-VAT-PRO-{NUMBER} Next number: 7	☑ Format: PL-VAT-FA-{NUMBER} Next number: 1	PL-PUQ sp. z o.o. PL-VAT: 5252834345 PL-VAT-UE: PL5252834345 Adres: ul. Szczęsna 26, 02-454 Warszawa
2	DE-PUQ sp. z o.o.	☐	DE5252834345	DE-VAT 19.000%	DE - Germany	☑ Format: DE-PRO-{NUMBER}	☑ Format: DE-FA-{NUMBER}	DE-PUQ sp. z o.o. DE-NIP: 5252834345 DE-VAT-UE: PL5252834345

Countries set

Sidebar (top):
- Home
- Account Statement +
- Auto CC Management +
- Blocking ticket for guests +
- Cancel Fund Invoices +
- Client Data Archive +
- Client Grouping Rules +
- Clients Only Access +
- Credit Management +
- Disabler of standard elements +
- Fraud Check +
- GDPR Tools +
- Head/Footer Output +
- Maintenance Mode +
- Menu Manager +
- Overwrite Suspend/Termination +
- Overwrite Tax Rules -
- Configuration
- Home companies
- Countries set
- Tax rules
- Pages Manager +
- Prorated Next Due Date +
- Service Data Archive +
- Show Services IP, Username +
- Support Hours Widget +
- Suspend After +

License status: success
2024-01-04T18:40:42+01:00

PUQ cloud

« Minimise Sidebar

Add Countries Set

[Select EU countries] [Select non-EU countries] [Select CNG countries] [Select non-CNG countries]

Set name: eu

Countries

[AD] - Andorra	☑ [EE] - Estonia	☐ [LA] - Lao People's Democratic Republic	☐ [RE] - Reunion
☐ [AE] - United Arab Emirates	☐ [EG] - Egypt	☐ [LB] - Lebanon	☑ [RO] - Romania
☐ [AF] - Afghanistan	☐ [EH] - Western Sahara	☐ [LC] - Saint Lucia	☐ [RS] - Serbia
☐ [AG] - Antigua And Barbuda	☐ [ER] - Eritrea	☐ [LI] - Liechtenstein	☐ [RU] - Russian Federation
☐ [AI] - Anguilla	☑ [ES] - Spain	☐ [LK] - Sri Lanka	☐ [RW] - Rwanda
☐ [AL] - Albania	☐ [ET] - Ethiopia	☐ [LR] - Liberia	☐ [SA] - Saudi Arabia
☐ [AM] - Armenia	☑ [FI] - Finland	☐ [LS] - Lesotho	☐ [SB] - Solomon Islands
☐ [AN] - Netherlands Antilles	☐ [FJ] - Fiji	☑ [LT] - Lithuania	☐ [SC] - Seychelles
☐ [AO] - Angola	☐ [FK] - Falkland Islands (Malvinas)	☑ [LU] - Luxembourg	☐ [SD] - Sudan
☐ [AR] - Argentina	☐ [FM] - Micronesia, Federated States Of	☑ [LV] - Latvia	☑ [SE] - Sweden
☐ [AS] - American Samoa	☐ [FO] - Faroe Islands	☐ [LY] - Libyan Arab Jamahiriya	☐ [SG] - Singapore
☑ [AT] - Austria	☑ [FR] - France	☐ [MA] - Morocco	☐ [SH] - Saint Helena
☐ [AU] - Australia	☐ [GA] - Gabon	☐ [MC] - Monaco	☑ [SI] - Slovenia
☐ [AW] - Aruba	☐ [GB] - United Kingdom	☐ [MD] - Moldova	☐ [SJ] - Svalbard And Jan Mayen
☐ [AX] - Aland Islands	☐ [GD] - Grenada	☐ [ME] - Montenegro	☑ [SK] - Slovakia
☐ [AZ] - Azerbaijan	☐ [GE] - Georgia	☐ [MF] - Saint Martin	☐ [SL] - Sierra Leone
☐ [BA] - Bosnia And Herzegovina	☐ [GF] - French Guiana	☐ [MG] - Madagascar	☐ [SM] - San Marino
☐ [BB] - Barbados	☐ [GG] - Guernsey	☐ [MH] - Marshall Islands	☐ [SN] - Senegal
☐ [BD] - Bangladesh	☐ [GH] - Ghana	☐ [MK] - Macedonia	☐ [SO] - Somalia
☑ [BE] - Belgium	☐ [GI] - Gibraltar	☐ [ML] - Mali	☐ [SR] - Suriname
☐ [BF] - Burkina Faso	☐ [GL] - Greenland	☐ [MM] - Myanmar	☐ [SS] - South Sudan
☑ [BG] - Bulgaria	☐ [GM] - Gambia	☐ [MN] - Mongolia	☐ [ST] - Sao Tome And Principe
☐ [BH] - Bahrain	☐ [GN] - Guinea	☐ [MO] - Macao	☐ [SV] - El Salvador
☐ [BI] - Burundi	☐ [GP] - Guadeloupe	☐ [MP] - Northern Mariana Islands	☐ [SY] - Syrian Arab Republic
☐ [BJ] - Benin	☐ [GQ] - Equatorial Guinea	☐ [MQ] - Martinique	☐ [SZ] - Swaziland
☐ [BL] - Saint Barthelemy	☐ [GR] - Greece	☐ [MR] - Mauritania	☐ [TC] - Turks And Caicos Islands
☐ [BM] - Bermuda	☐ [GS] - South Georgia And Sandwich Isl.	☐ [MS] - Montserrat	☐ [TD] - Chad
☐ [BN] - Brunei Darussalam	☐ [GT] - Guatemala	☑ [MT] - Malta	☐ [TF] - French Southern Territories
☐ [BO] - Bolivia	☐ [GU] - Guam	☐ [MU] - Mauritius	☐ [TG] - Togo
☐ [BR] - Brazil	☐ [GW] - Guinea-Bissau	☐ [MV] - Maldives	☐ [TH] - Thailand
☐ [BS] - Bahamas	☐ [GY] - Guyana	☐ [MW] - Malawi	☐ [TJ] - Tajikistan
☐ [BT] - Bhutan	☐ [HK] - Hong Kong	☐ [MX] - Mexico	☐ [TK] - Tokelau
☐ [BW] - Botswana	☐ [HM] - Heard Island & Mcdonald Islands	☐ [MY] - Malaysia	☐ [TL] - Timor-Leste
☐ [BY] - Belarus	☑ [HR] - Croatia	☐ [MZ] - Mozambique	☐ [TM] - Turkmenistan
☐ [BZ] - Belize	☐ [HT] - Haiti	☐ [NA] - Namibia	☐ [TN] - Tunisia
☐ [CA] - Canada	☑ [HU] - Hungary	☐ [NC] - New Caledonia	☐ [TO] - Tonga
☐ [CC] - Cocos (Keeling) Islands	☐ [IC] - Canary Islands	☐ [NE] - Niger	☐ [TR] - Turkey
		☐ [NF] - Norfolk Island	☐ [TT] - Trinidad And Tobago

Tax rules

[Add new Tax Rule] [Add rules for EU countries]

ID	Order	Country	Home company	Private client	Company without VAT ID	Company with VAT ID	Individual TAX rate	Tax name	Tax rate
#28 (1)	↑ ↓	SE - Sweden	PL-PUQ sp. z o.o. [PL] - PL5252834345	☑	☑	☑	☑	MOMS	25.000%
#27 (2)	↑ ↓	ES - Spain	PL-PUQ sp. z o.o. [PL] - PL5252834345	☑	☑	☑	☑	IVA	21.000%
#26 (3)	↑ ↓	SI - Slovenia	PL-PUQ sp. z o.o. [PL] - PL5252834345	☑	☑	☑	☑	DDV	22.000%
#25 (4)	↑ ↓	SK - Slovakia	PL-PUQ sp. z o.o. [PL] - PL5252834345	☑	☑	☑	☑	DPH	20.000%
#24 (5)	↑ ↓	RO - Romania	PL-PUQ sp. z o.o. [PL] - PL5252834345	☑	☑	☑	☑	TVA	19.000%
#23 (6)	↑ ↓	PT - Portugal	PL-PUQ sp. z o.o. [PL] - PL5252834345	☑	☑	☑	☑	IVA	23.000%
#21 (7)	↑ ↓	NL - Netherlands	PL-PUQ sp. z o.o. [PL] - PL5252834345	☑	☑	☑	☑	BTW	21.000%
#20 (8)	↑ ↓	MT - Malta	PL-PUQ sp. z o.o. [PL] - PL5252834345	☑	☑	☑	☑	VAT	18.000%
#19 (9)	↑ ↓	LU - Luxembourg	PL-PUQ sp. z o.o. [PL] - PL5252834345	☑	☑	☑	☑	TVA	17.000%
#18 (10)	↑ ↓	LT - Lithuania	PL-PUQ sp. z o.o. [PL] - PL5252834345	☑	☑	☑	☑	PVM	21.000%
#17 (11)	↑ ↓	LV - Latvia	PL-PUQ sp. z o.o. [PL] - PL5252834345	☑	☑	☑	☑	PVN	21.000%
#16 (12)	↑ ↓	IT - Italy	PL-PUQ sp. z o.o. [PL] - PL5252834345	☑	☑	☑	☑	IVA	22.000%
#15 (13)	↑ ↓	IE - Ireland	PL-PUQ sp. z o.o. [PL] - PL5252834345	☑	☑	☑	☑	VAT	23.000%
#1 (14)	↑ ↓	PL - Poland	DE-PUQ sp. z o.o. [DE] - DE5252834345	☑	☑	☑	⊟	⊟	⊟
#14 (15)	↑ ↓	HU - Hungary	PL-PUQ sp. z o.o. [PL] - PL5252834345	☑	☑	☑	☑	ÁFA	27.000%
#13 (16)	↑ ↓	GR - Greece	PL-PUQ sp. z o.o. [PL] - PL5252834345	☑	☑	☑	☑	ΦΠΑ	24.000%
#12 (17)	↑ ↓	DE - Germany	PL-PUQ sp. z o.o. [PL] - PL5252834345	☑	☑	☑	☑	MwSt.	19.000%

Client Profile

Ruslan Polovyi (TEST sp. z o. o.) - #1 ▼ | **Company with VAT ID** (PL) | Home company: **DE-PUQ sp. z o.o.** (DE) | **TAX:** Rule #1 (DE-VAT: 0%) | ⟳ **VIES Status: Valid** (2023-06-20 12:49:54) | **Exempt from tax: YES**

Invoice #DE-FA-33

🔒 View as Client   🖨 Print ▾   ⬇ Download ▾

| Summary | Add Payment | Options | Credit | Refund | Notes |

Client Name	Ruslan Polovyi (TEST sp. z o. o.) (View Invoices)
Invoice #	DE-FA-33
Invoice Date	2023/06/20
Due Date	2023/06/20
Total Due	$2.00
Balance	$-0.38

PAID
2023/06/20 13:31
Payment Method: **Bank Transfer**

Invoice Payment Confirmation ▼   Send Email

Attempt Capture   Mark Cancelled   Mark Unpaid

Company with VAT ID (PL) | Home company: **DE-PUQ sp. z o.o.** (DE) | **TAX:** Rule #1 (DE-VAT: 0%) | ⟳ **VIES Status: Valid** (2023-06-20 12:49:54) | **Exempt from tax: YES**

| Frozen Data **YES** | ✏ Edit | Proforma Number | DE-PRO-12 | Invoice Number | DE-FA-33 | **VIES Status: Valid** (2023-06-20 12:49:54) | **Exempt from tax: YES** |

Client

Name	Ruslan Polovyi
Company Name	TEST sp. z o. o.
TAX ID	PL█████████129
Address	████████████ 2 ████████, █████ Poland

Home company

Company Name	DE-PUQ sp. z o.o.
TAX ID	DE5252834345
Pay To Text	DE-PUQ sp. z o.o. DE-NIP: 5252834345 DE-VAT-UE: PL5252834345 Adres: ul. Szczęsna 26, 02-454 Warszawa

Invoice Items

	Description	Amount	Taxed	
☐	WireGuard Business-VPN 10 (20/08/2023 - 19/09/2023)	2.00	☑	⊖
			☐	⊕

- With Selected - ▼

	Sub Total:	$2.00
	Credit:	$0.00
	Total Due:	**$2.00**

Save Changes   Cancel Changes

Transactions

PAID

Invoice #DE-FA-33

Invoice Date: Tuesday, June 20th, 2023

Due Date: Tuesday, June 20th, 2023

Invoiced To
TEST sp. z o. o.
ATTN: Ruslan Polovyi

Poland
Tax ID: PL8252134129

NIP: 987652432

Description	Total
WireGuard Business-VPN 10 (20/08/2023 - 19/09/2023)	$2.00
Sub Total	**$2.00**
0% DE-VAT	**$0.00**
Credit	**$0.00**
Total	**$2.00**

Transactions

Transaction Date	Gateway	Transaction ID	Amount
Friday, December 1st, 2023	Bank Transfer		$2.38
		Balance	**$-0.38**

Revision #2
Created 20 June 2023 10:53:43 by Ruslan
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