

Create and manage Tax Rules

PUQcloud Panel

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This guide shows you how to set up and maintain **Tax Rules** for different countries and regions in the **PUQcloud Panel**. Use these rules to automatically apply the correct taxes on invoices based on the client type and location.

Overview

- **Where: Menu** → **Finance** → **Tax Rules**
- **What you can do:** Create rules, generate presets for Canada/EU, edit, delete, and change the order of rules.
- **Who can do it:** Administrators with access to the Finance area.

How matching works

The system reads rules **from top to bottom**. The **first matching rule** is applied. Keep your most specific rules (e.g., province/state) **above** more general ones.

Before You Start

1. Make sure you have at least one **Home Company** configured (Settings → Finance → Home Companies).
2. Know your target **tax rates** (GST/HST/PST/VAT, etc.).
3. Decide which **client types** the rule should apply to:
 - **Private Client** (individual)
 - **Company Without TAX ID**
 - **Company With TAX ID**

Always verify rates with your accountant or the official tax authority.

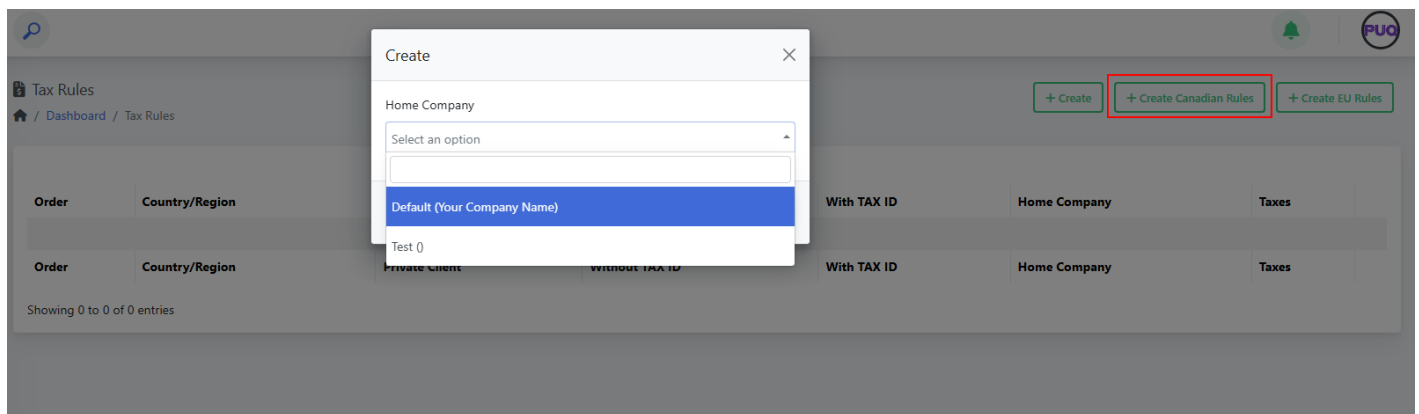
Quick Start: Generate Preset Rules

You can auto-create a starting set of rules and then fine-tune them.

Create Canadian Rules

1. Go to **Finance** → **Tax Rules**.
2. Click **Create Canadian Rules**.
3. Select your **Home Company** and **Save**.
4. Review the generated rules and adjust rates as needed.

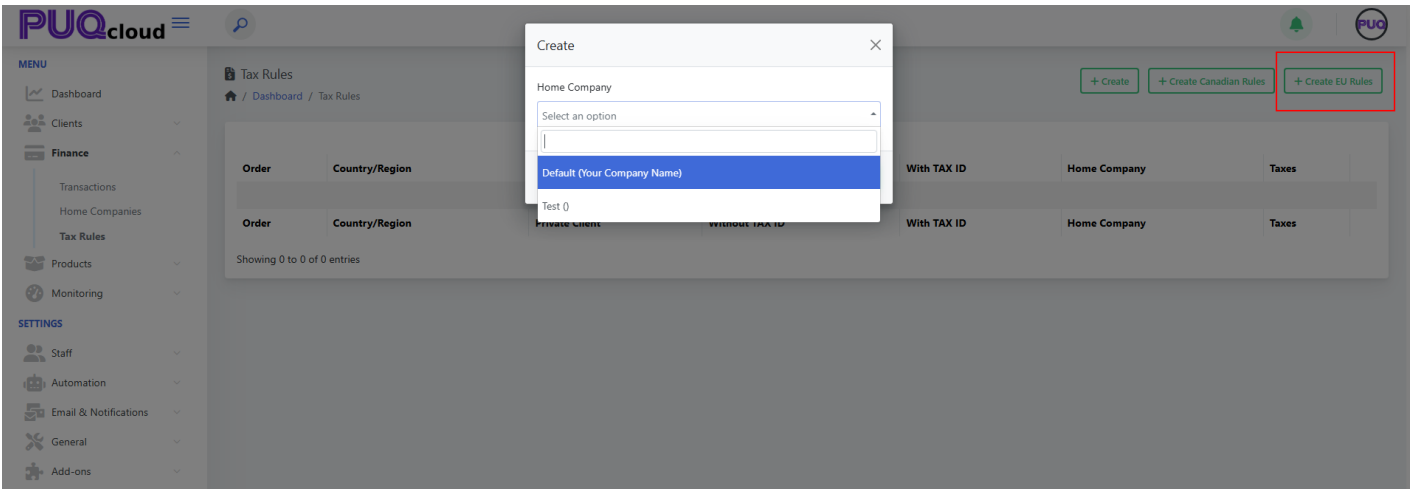
(Screenshot reference: "Create Canadian Rules" modal)



Create EU Rules

1. Go to **Finance** → **Tax Rules**.
2. Click **Create EU Rules**.
3. Select your **Home Company** and **Save**.
4. Review the generated rules and adjust rates as needed.

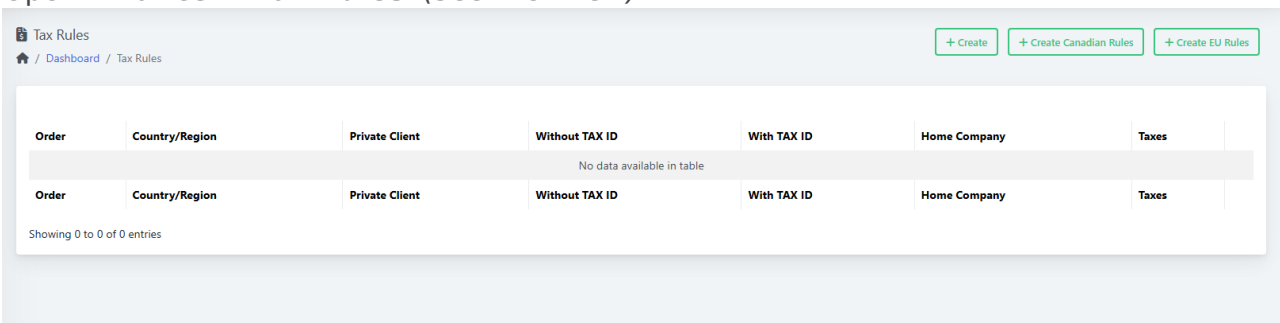
(Screenshot reference: "Create EU Rules" modal)



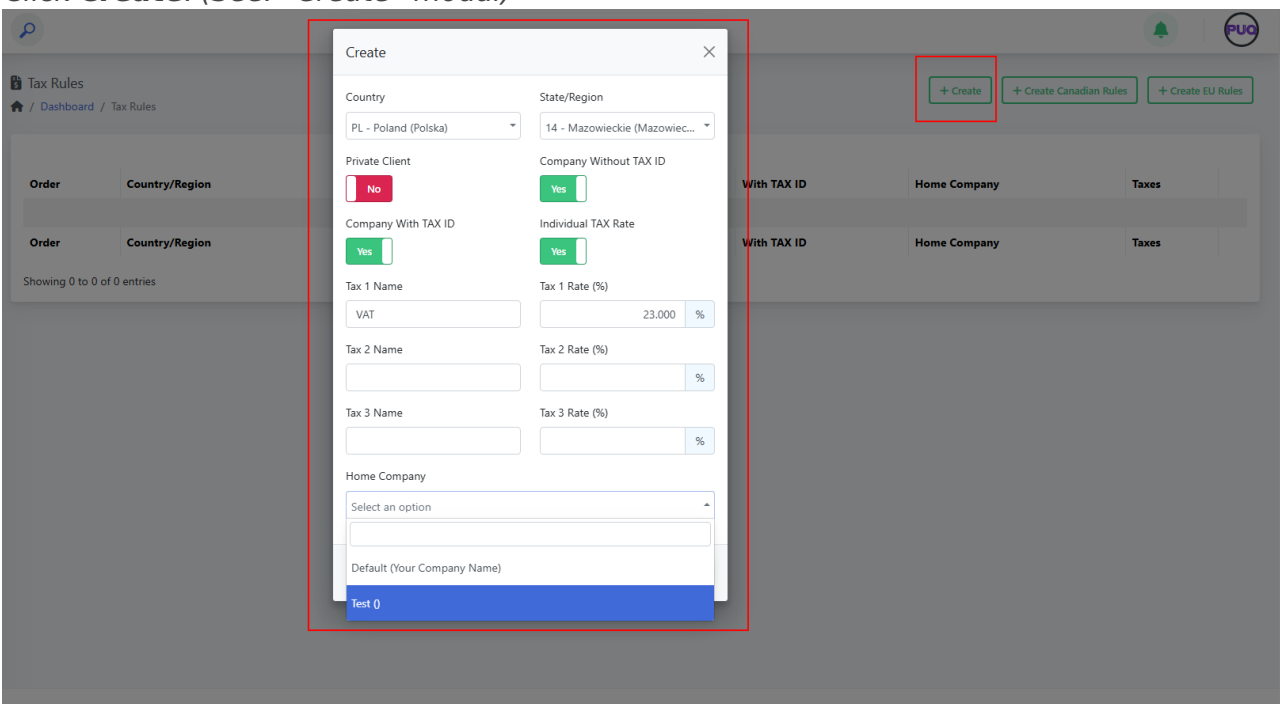
Note: Presets are a convenience. You are responsible for validating the final rates.

Create a Tax Rule Manually

1. Open **Finance** → **Tax Rules**. (See: *List view*)



2. Click **Create**. (See: *"Create" modal*)



3. Fill the fields:

- **Country** and **State/Region** (optional).
 - Turn on the client-type toggles the rule should apply to:
Private Client, Company Without TAX ID, Company With TAX ID.
(Use **Individual TAX Rate** if the rule should tax individuals.)
 - Enter up to **three taxes** (name + percent). Example:
 - **Tax 1 Name:** — **Tax 1 Rate:**
 - **Tax 2 Name:** — **Tax 2 Rate:** (if applicable)
 - **Tax 3 Name:** — **Tax 3 Rate:** (if applicable)
 - Choose **Home Company**.
4. Click **Save**. Your rule appears in the list. (See: *List after creating a rule*)

Order	Country/Region	Private Client	Without TAX ID	With TAX ID	Home Company	Taxes	
1	Poland Mazowieckie	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		VAT: 23.000%	<input type="checkbox"/> <input type="checkbox"/>

Showing 1 to 1 of 1 entries

Edit a Rule

1. In **Finance** → **Tax Rules**, click the **Edit** icon on the desired row.
2. Change any fields (country/region, toggles, tax names/rates, home company).
3. Click **Save**.

(Screenshot reference: "Edit" modal)

Edit ✕

Country <input type="text" value="Poland"/>	State/Region <input type="text" value="Mazowieckie"/>
Private Client <input checked="" type="checkbox"/> No	Company Without TAX ID <input checked="" type="checkbox"/> Yes
Company With TAX ID <input checked="" type="checkbox"/> Yes	Individual TAX Rate <input checked="" type="checkbox"/> Yes
Tax 1 Name <input type="text" value="VAT"/>	Tax 1 Rate (%) <input type="text" value="23.000"/> %
Tax 2 Name <input type="text"/>	Tax 2 Rate (%) <input type="text"/> %
Tax 3 Name <input type="text"/>	Tax 3 Rate (%) <input type="text"/> %
Home Company <input type="text" value="null"/>	

Delete a Rule

1. In **Finance** → **Tax Rules**, click the **Delete** (trash) icon on the row.
2. Confirm the deletion.

Deleting a rule does not change past invoices; it only affects new invoices going forward.

Change Rule Order (Priority)

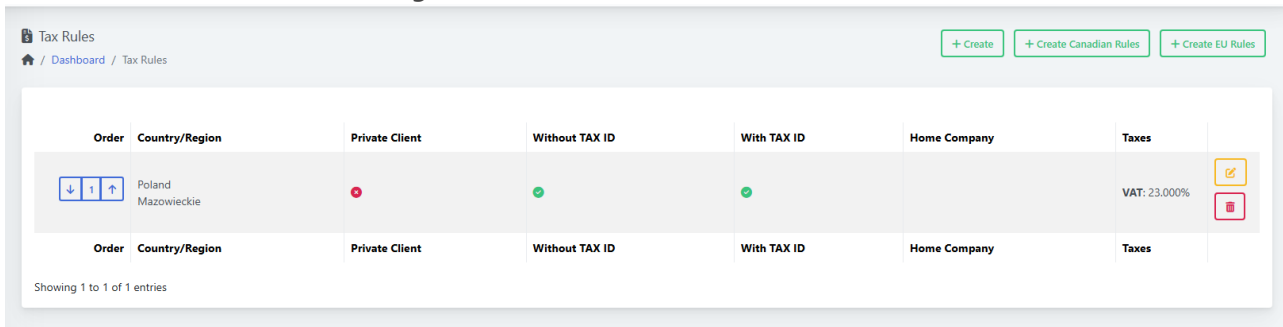
1. In **Finance** → **Tax Rules**, use the **up/down arrows** in the **Order** column.
2. Place **specific** rules (e.g., province/state) **above** general country-wide rules.

Field Reference



Field	Type	What it controls	Example
Country	Dropdown	The country the rule applies to.	Poland
State/Region	Dropdown	Optional region/province/state inside the country.	Mazowieckie
Private Client	Toggle	Apply this rule to individuals .	On
Company Without TAX ID	Toggle	Apply when client is a company without a valid tax ID.	On
Company With TAX ID	Toggle	Apply when client is a company with a valid tax ID.	On
Individual TAX Rate	Toggle	Enable taxation for individuals per this rule.	On
Tax 1 Name / Rate (%)	Text / Number	First tax component name and percentage.	VAT / 23.000
Tax 2 Name / Rate (%)	Text / Number	Second tax component (if needed).	PST / 7.000
Tax 3 Name / Rate (%)	Text / Number	Third tax component (if needed).	GST / 5.000
Home Company	Dropdown	Which Home Company owns/uses this rule.	Default (Your Company Name)

Example: Poland → Mazowieckie (VAT 23%)

1. **Create** a rule.
2. Country: **Poland**; State/Region: **Mazowieckie**.
3. Toggles: **Private Client = Off** (if you only tax businesses), **Company Without TAX ID = On**, **Company With TAX ID = On**.
4. Tax 1 Name: **VAT**; Tax 1 Rate: **23.000**.
5. Select **Home Company**.
6. **Save**. (See: *List after creating a rule*)



The screenshot shows the 'Tax Rules' page in a software application. At the top right, there are three buttons: '+ Create', '+ Create Canadian Rules', and '+ Create EU Rules'. Below these is a table with the following columns: Order, Country/Region, Private Client, Without TAX ID, With TAX ID, Home Company, Taxes, and an action column. A single row is visible, representing a rule for Poland/Mazowieckie. The 'Private Client' toggle is turned off (red dot), while 'Without TAX ID' and 'With TAX ID' are turned on (green dots). The 'Taxes' column shows 'VAT: 23.000%'. The 'Home Company' column is empty. The table is currently showing 1 of 1 entries.

Order	Country/Region	Private Client	Without TAX ID	With TAX ID	Home Company	Taxes	
1	Poland Mazowieckie	Off	On	On		VAT: 23.000%	 

Tips & Good Practices

- Keep a **country-wide** rule at the bottom and **region-specific** rules above it.
- Use clear tax names: **VAT**, **GST**, **PST**, **HST**.
- Review rules after **tax law changes** or when you expand to new regions.
- For multi-company setups, double-check the **Home Company** on each rule.

Troubleshooting

- **My client is taxed incorrectly**
 - Check rule **order** (a broader rule may be matched first).
 - Verify the **client's country/region** and **tax ID** status.
 - Confirm the **toggles** (Private/With ID/Without ID) match your intent.
 - Ensure tax **rates are numeric** (e.g., `|23.000|`).
- **I don't see my Home Company**
 - Create it in **Home Companies** and then return to Tax Rules.

Screenshot References

- **List view (empty)** — overall layout and action buttons (*Create, Create Canadian Rules, Create EU Rules*).
- **Create modal** — full form with toggles and tax fields.
- **Create Canadian Rules modal** — select Home Company.
- **Create EU Rules modal** — select Home Company.

- **List view (after creating)** — shows Poland/Mazowieckie, indicators and VAT 23.000%.
 - **Edit modal** — modify existing rule fields.
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