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.

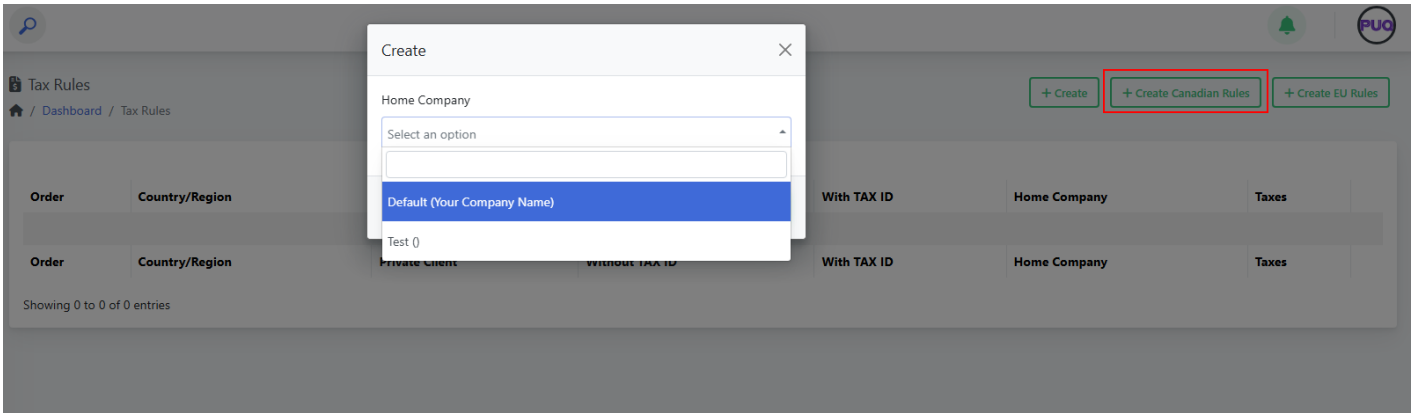
Quick Start: Generate Preset Rules

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.

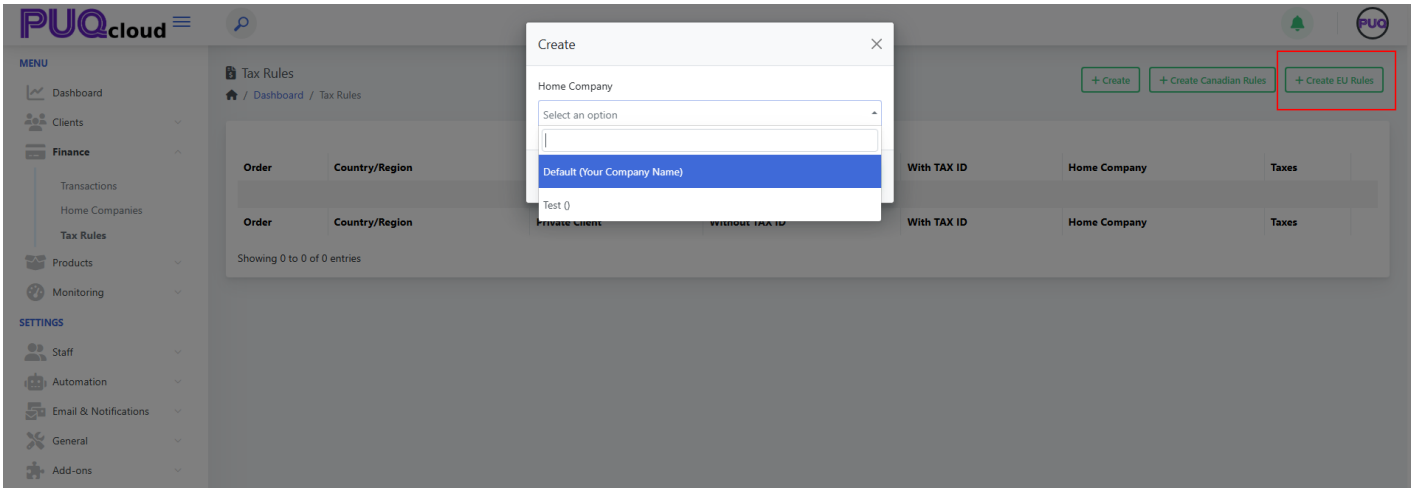
(Screenshot reference: “Create Canadian Rules” modal)



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.

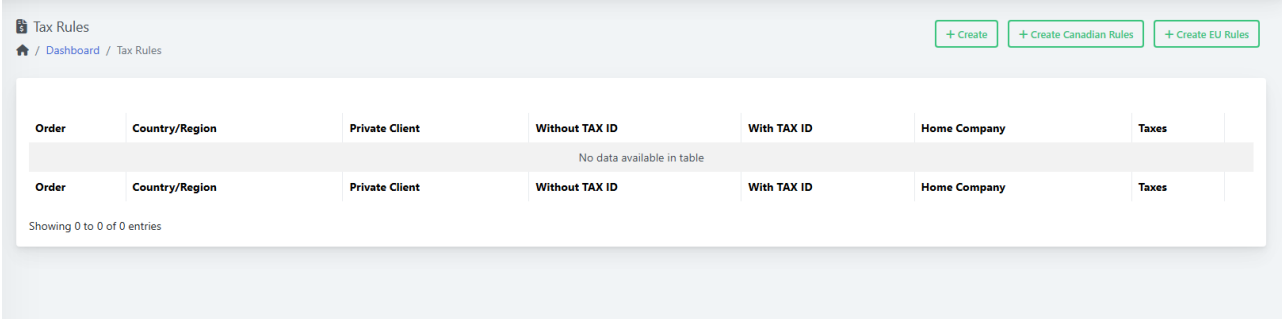
(Screenshot reference: “Create EU Rules” modal)



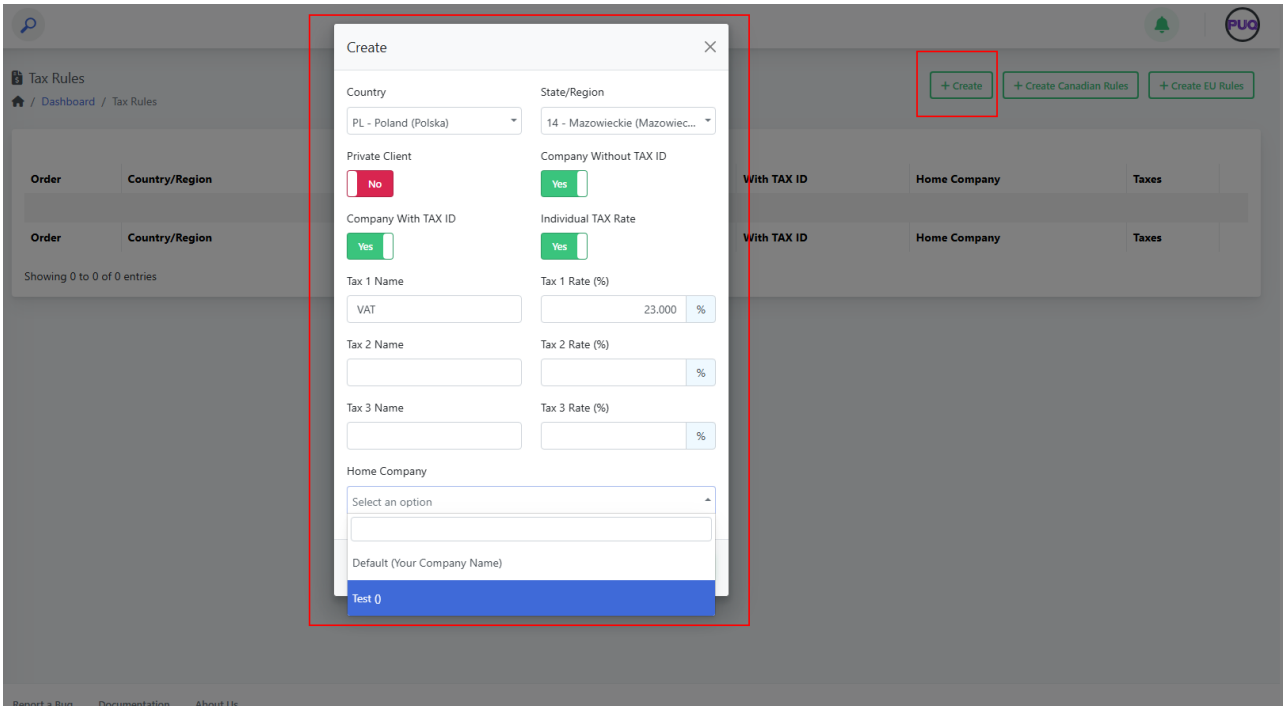
Note: Presets are a convenience. You are responsible for validating the final rates.

Create a Tax Rule Manually

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



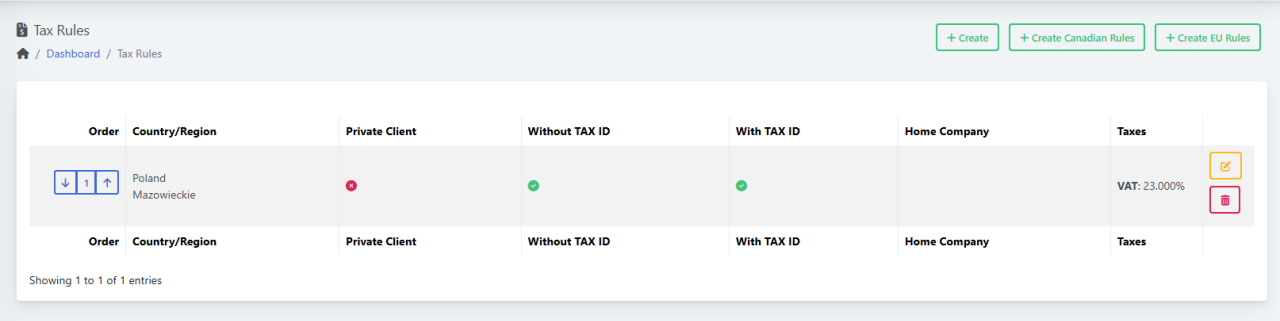
2. Click **Create**. *(See: "Create" modal)*



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:* `VAT` — *Tax 1 Rate:* `23.000`
  - *Tax 2 Name:* `PST` — *Tax 2 Rate:* `7.000` (if applicable)
  - *Tax 3 Name:* `GST` — *Tax 3 Rate:* `5.000` (if applicable)
- Choose **Home Company**.

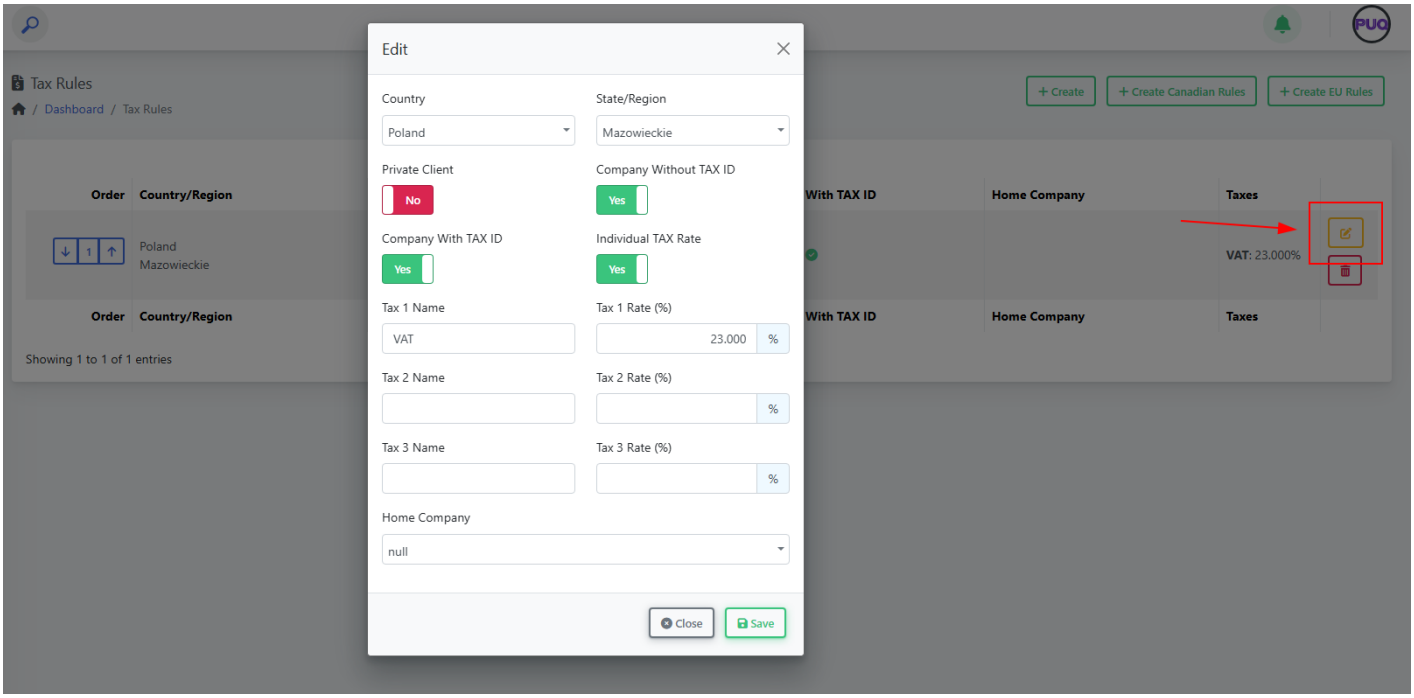
4. Click **Save**. Your rule appears in the list. *(See: List after creating a rule)*



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)



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)

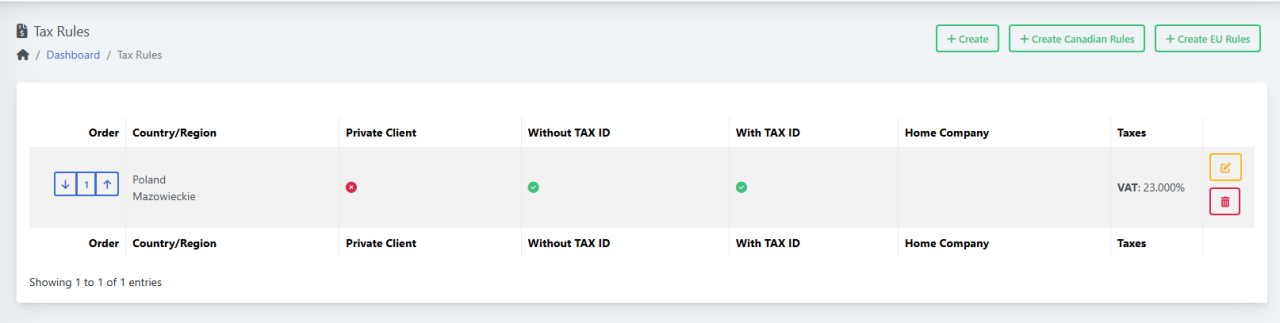
1. In **Finance → Tax Rules**, use the **up/down arrows** in the **Order** column.
2. Place **specific** rules (e.g., province/state) **above** general country-wide rules.

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)*



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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