

# 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.

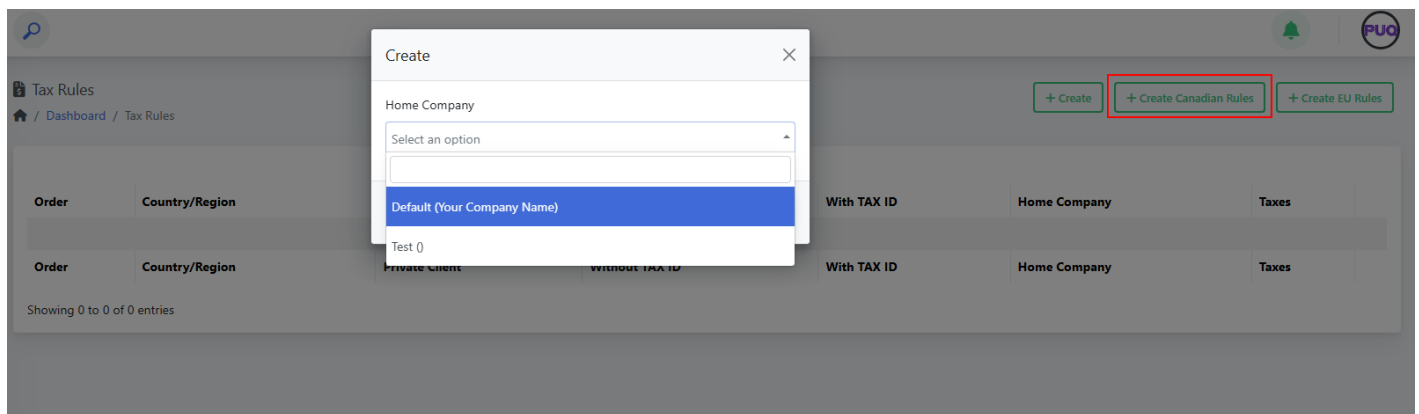
## Quick Start: Generate Preset Rules

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.

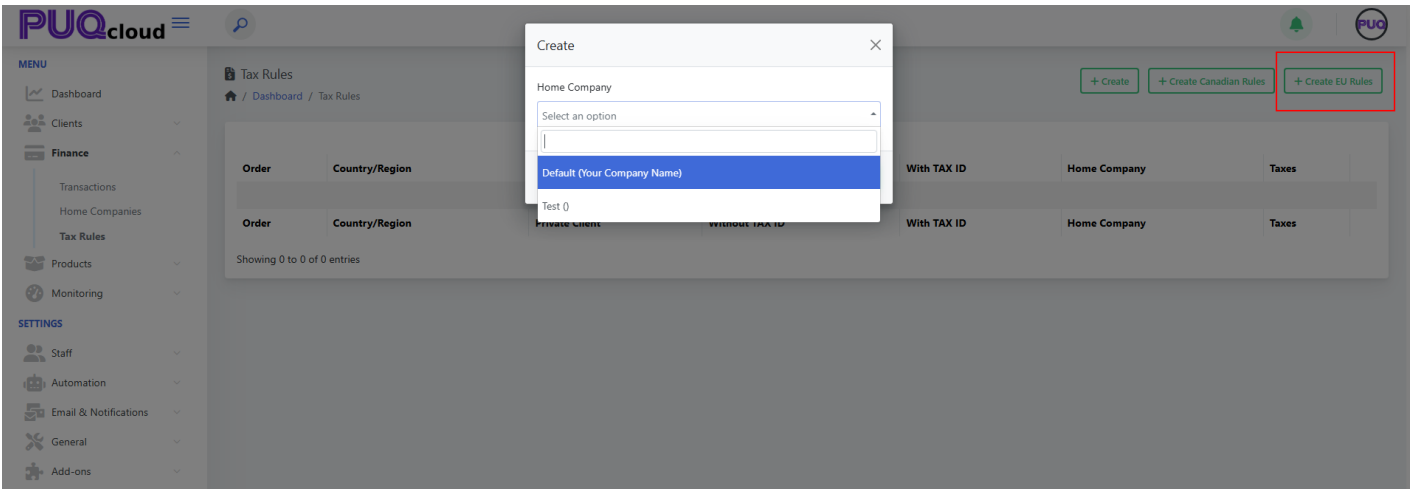
(Screenshot reference: "Create Canadian Rules" modal)



### 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.

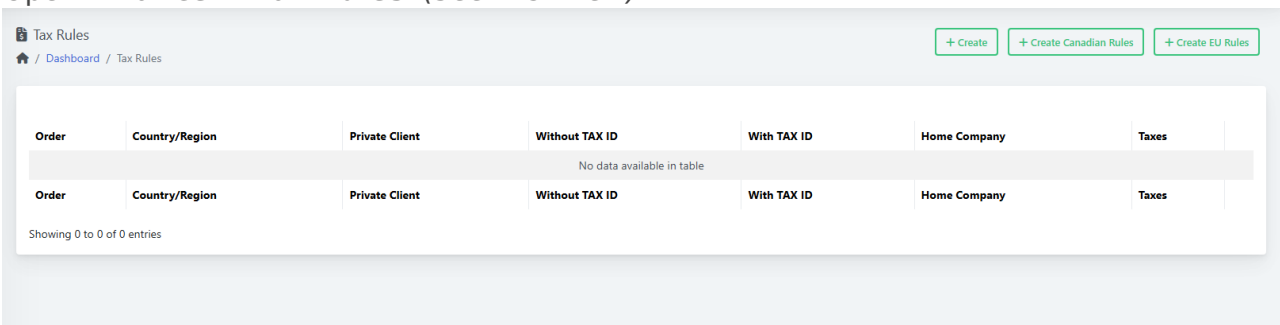
(Screenshot reference: "Create EU Rules" modal)



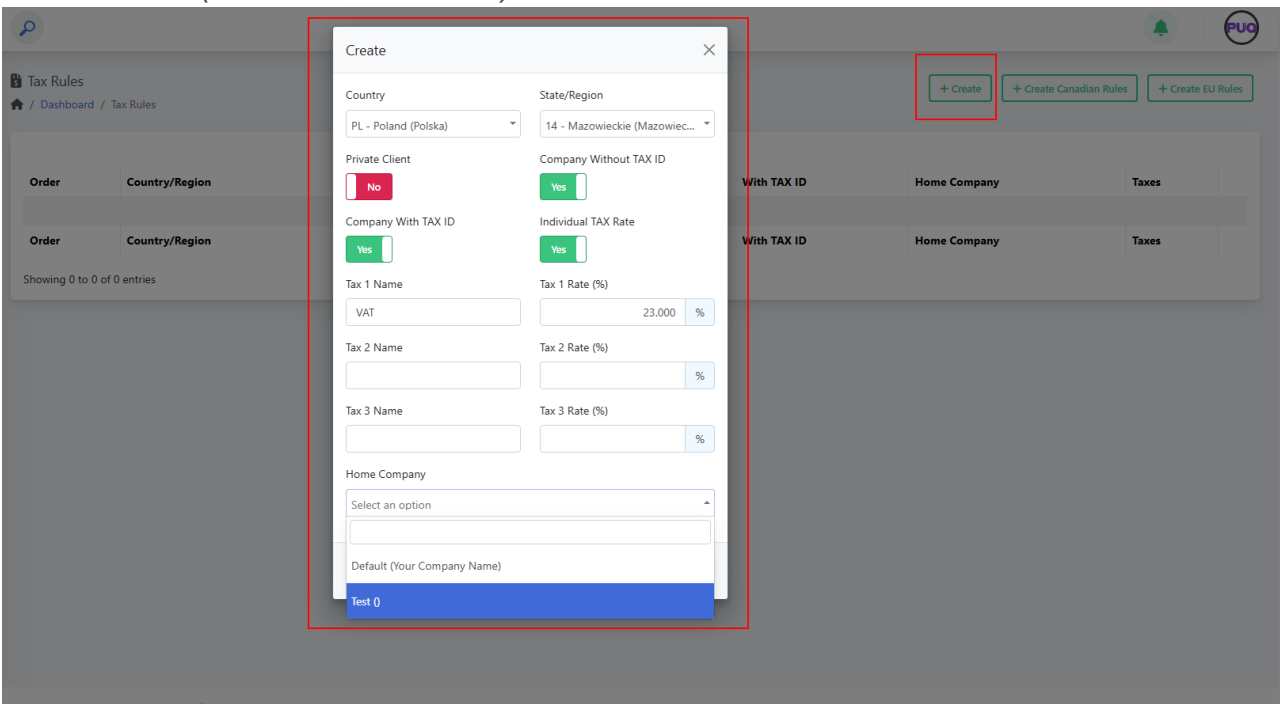
**Note:** Presets are a convenience. You are responsible for validating the final rates.

## 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)

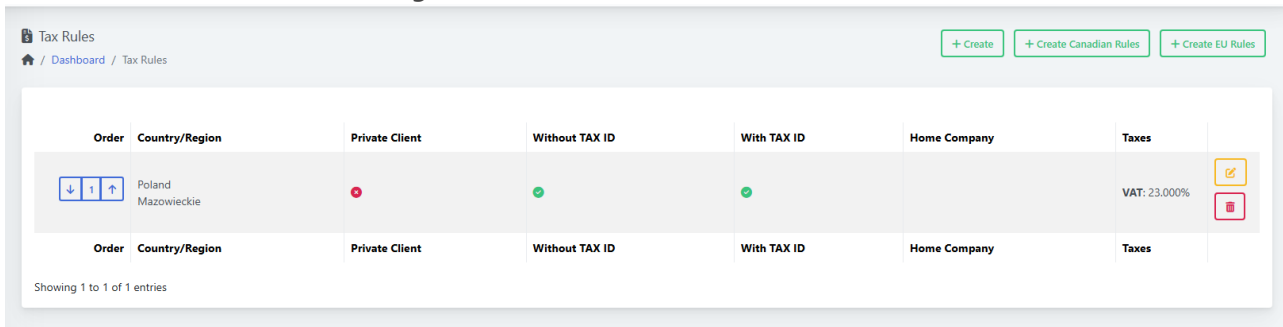
1. In **Finance** → **Tax Rules**, use the **up/down arrows** in the **Order** column.
2. Place **specific** rules (e.g., province/state) **above** general country-wide rules.

## 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 <b>individuals</b> .	On
Company Without TAX ID	Toggle	Apply when client is a <b>company without</b> a valid tax ID.	On
Company With TAX ID	Toggle	Apply when client is a <b>company with</b> 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' interface. 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. The table contains one entry for 'Poland Mazowieckie'. The 'Private Client' toggle is off (red dot), 'Without TAX ID' is on (green dot), and 'With TAX ID' is on (green dot). The 'Taxes' column shows 'VAT: 23.000%'. The 'Home Company' column is empty. The 'Order' column has a '1' and arrows for sorting. At the bottom left, it says 'Showing 1 to 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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Revision #4

Created 2 September 2025 06:26:37 by Yuliia Noha

Updated 28 October 2025 09:31:18 by Yuliia Noha