

# Create and manage Tax Rules

## PUQcloud Panel

[Order Now](#) | [Download](#) | [FAQ](#)

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.

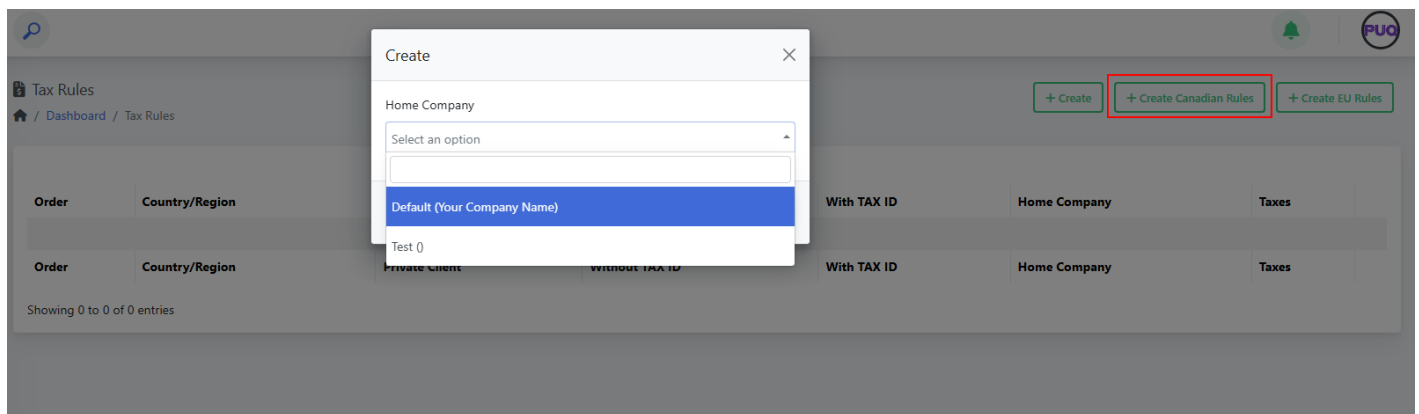
## Quick Start: Generate Preset Rules

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.

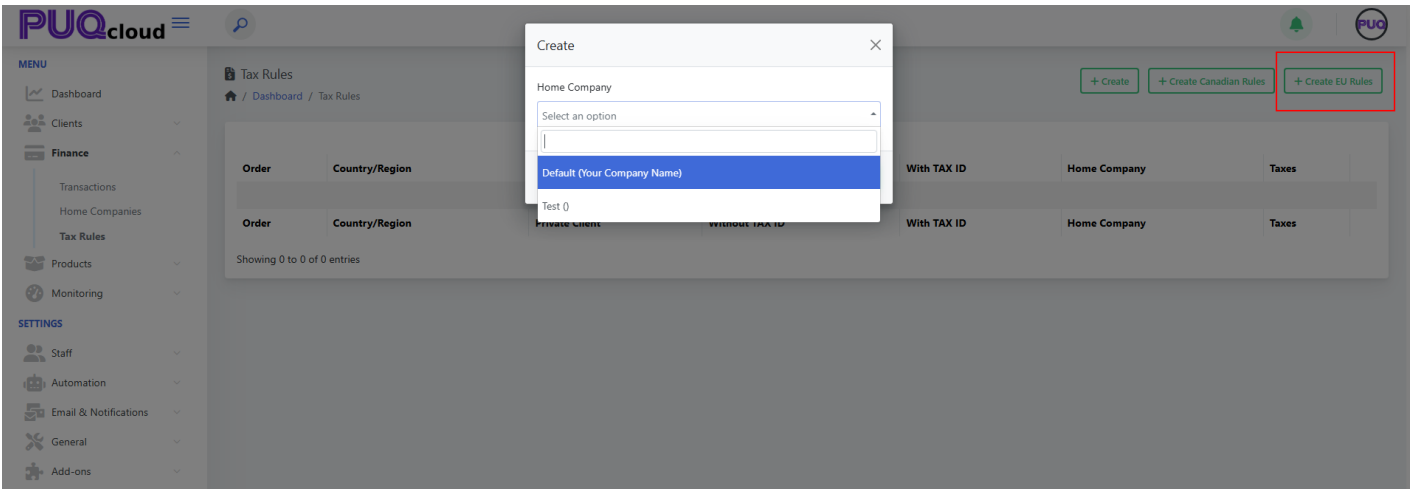
(Screenshot reference: "Create Canadian Rules" modal)



### 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.

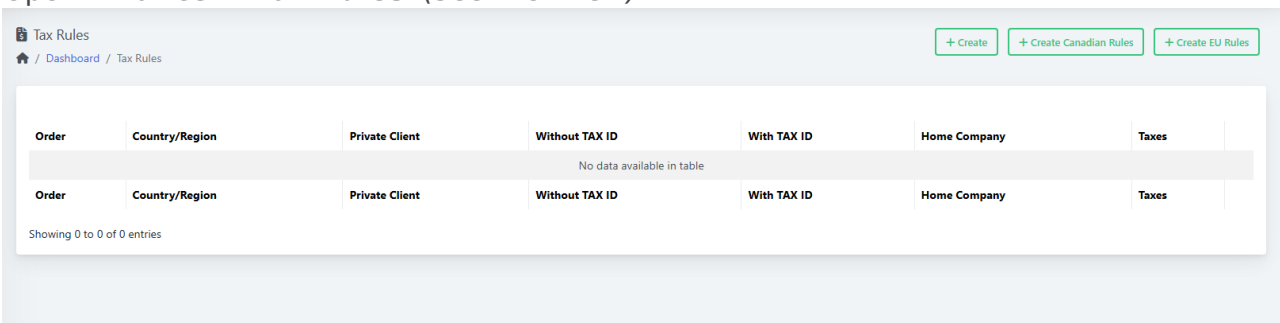
(Screenshot reference: "Create EU Rules" modal)



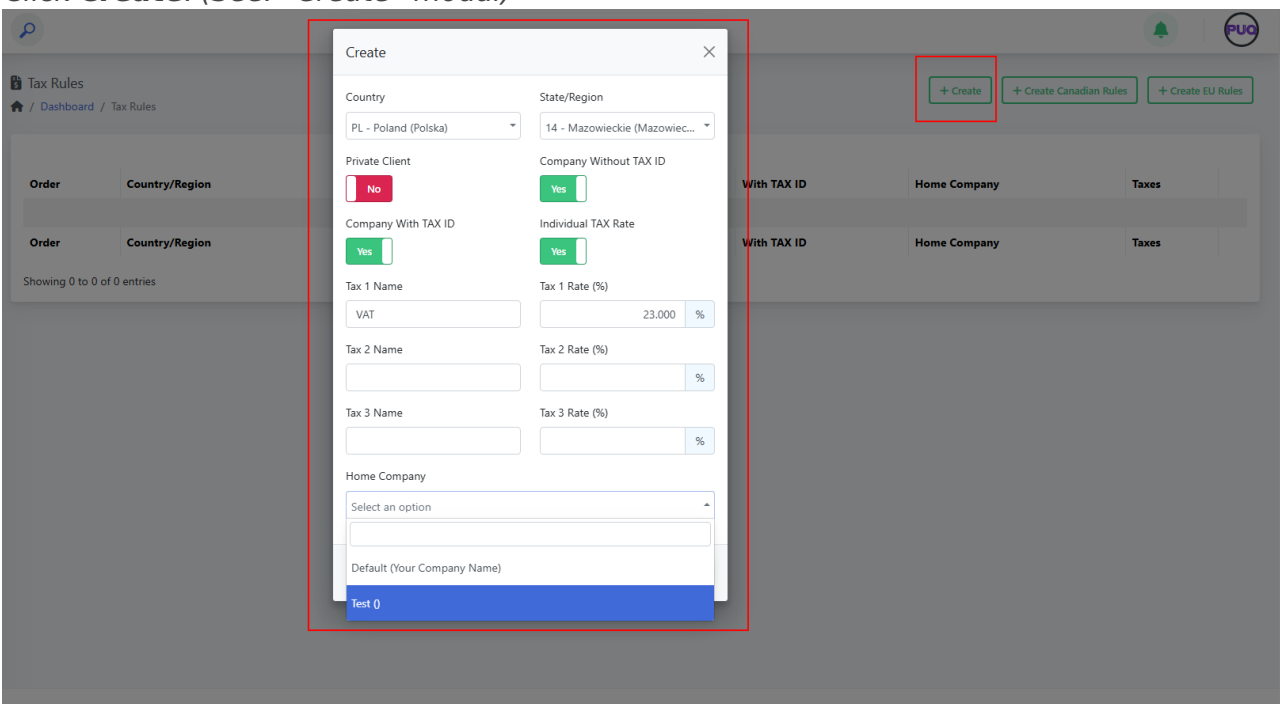
**Note:** Presets are a convenience. You are responsible for validating the final rates.

## 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*)

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%	 

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 Poland	State/Region 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 VAT	Tax 1 Rate (%) 23.000 %
Tax 2 Name	Tax 2 Rate (%)
Tax 3 Name	Tax 3 Rate (%)
Home Company 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)

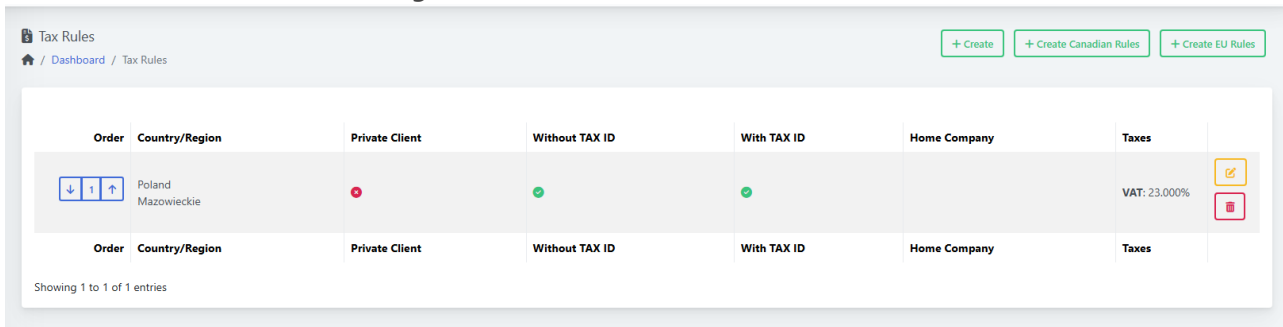
1. In **Finance** → **Tax Rules**, use the **up/down arrows** in the **Order** column.
2. Place **specific** rules (e.g., province/state) **above** general country-wide rules.

## 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' column has a red dot, 'Without TAX ID' has a green dot, and 'With TAX ID' has a green dot. The 'Taxes' column shows 'VAT: 23.000%'. The action column has a yellow edit icon and a red delete icon. 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.
- 

Revision #4

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

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