Setting Tax Rules & Rates

You have two choices for tax rate set-up:

1. Use our tax table database (US only).

We use a tax table, which is updated on a regular basis, to calculate taxes, which are charged based on the delivery or pickup ZIP code. The tax database is updated 3 times a year and includes only US tax regions.

To enable use of the tax table:

1. In **Lab 50,** click **Store Management > Application Settings > double-click Photo Finale > check-box is on the General tab.**
2. Then click **Save** (left sidebar)

2. OR, you can set your own tax rules

This can be either a single rate, or a ZIP-code based rate you enter yourself.. If you would like to set your own tax rules:

1. Disable the database tax table, as described above. **You must not have the database tax table enabled if you are going to define your own rules**
2. In **Lab 50,** click on **Store Management** > **Tax Rules**, then double-click on an existing rule to edit it or click on *Create a new tax rule* to setup a new tax option.

The configuration settings are the following:

- **Name:** Enter a name for each tax rule.
- **Tax description:** Select the type of tax rule you are creating.
- **Tax rate:** Set the Tax Rate for each State/Province or ZIP Code.
- **Tax shipping:** Select if shipped items to State/Province or ZIP Code are taxable.
- **Apply on top of other taxes:** Select this option if this tax is charged in addition to other taxes.
- **Apply to all orders:** Select whether or not this applies for all order types.
- **Apply to the selected states/provinces/regions:** Choose one or more states/provinces/regions with the same tax rate
- **Apply to the specified zip codes:** Add the ZIP Code(s) and apply this tax rule to orders from these specific areas.
- **Enabled:** Mark this tax rule as active.
- **Deleted:** Mark this tax rule as deleted.

Canadian dealers should set up rules like this to cover GST and HST for the various provinces (check the rates, this screenshot is for demo only)

Select an existing tax rule or create a new one

	Name	Rate	Tax Shipping
●	GST	5.00 %	YES
●	ON HST	8.00 %	YES
●	NB HST	8.00 %	YES
●	NL HST	8.00 %	YES
●	NS HST	10.00 %	YES
●	US	0.00 %	YES
●	BC PST	7.00 %	NO
●	PEI	9.00 %	YES

FAQ:

Q: Is there a way to tax items in shipped orders?

A: Yes. The setup depends on whether the dealer is using the US Tax Database, Tax Rules, or a Flat Tax.

With the US Tax Database, tax is automatically charged for shipped orders based on the zip code & county of the shipped order if the dealer has tax nexus in a state. By default they have tax nexus in every state that they have store locations (on our platform). If a dealer wants to charge tax in a state in which they don't currently have store locations, they can either add a dummy store location in that state (with "customer pickup" disabled) or they can give us a list of the states and we can set it in the database in a nexus override property (introduced in PF 13.5).

Since it would be a pain to create more than a few dummy stores, the new nexus override property is definitely the way to go. The override list needs to be a lowercase string of comma-separated postal abbreviations. Once you have it, send it to support with your dealer code please.

Example:
"ca,co,dc,ga,il,in,ia,ky,la,md,me,mi,mn,nc,nd,ne,nj,nv,ok,ri,sd,ut,va,wa,wi,wv"

Q: Is there a way to see what taxes are configured in the Tax DB?

A: There's no way for the dealer to see it but we can run a query from the database and export to XLS for you.