2. Tax Templates

Create reusable percentage or fixed tax and fee templates.

- How to create a tax or fee template
- How to review automatic tax application and calculations

How to create a tax or fee template

Create reusable tax templates for percentage-based taxes or fixed charges that can be applied to eligible sales and items.

Create the template

1. Open **Settings > Tax**.
2. Select **Create New Tax Template**.
3. Enter a clear template name.
4. Enter a short receipt symbol of up to five characters.
5. Choose **Percentage** or **Fixed amount**.
6. Enter the rate or amount.
7. Review the example calculation.
8. Choose whether the template should apply automatically where assigned.
9. Save the template.

A percentage changes with the taxable amount. A fixed template adds the same amount each time it is applied.

How to review automatic tax application and calculations

Review a tax template before using it so employees and customers see the expected charge.

Check the calculation

1. Open the tax template.
2. Confirm whether it uses a percentage or fixed amount.
3. Review the rate, amount, name, and receipt symbol.
4. Use the displayed example to check the expected charge.
5. Confirm which products or transaction workflows use the template.

Automatic application

When **Apply automatically** is enabled, the template starts selected wherever it has been assigned. When disabled, it remains available but an employee must select it when appropriate.

Tax rules vary by jurisdiction and product type. RepairNest POS provides configuration tools, but the business is responsible for choosing and applying legally correct rates and fees.