

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.

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