GETTING STARTED WITH RUNDOO · SETUP

Sales Tax Components

Split a tax rate into the parts you remit. The customer still pays one number, and your reports show every piece.

THREE PLACES IT LIVES

1

Your location's rate

Admin, Locations, open the location, click the Sales tax rate.

Split into tax components

2

Custom and delivery rates

Admin, Locations, scroll to Custom tax rates and open a rate.

Same split, same screen

3

Your reports

Reports, Create report, then set the date range.

Tax components

Split a rate into components

1. Open the rate and turn on **Split into tax components**.
2. Give each component a **Name**, a **Type**, and a **Rate**.
3. Keep going until the Total reads **All assigned**.
4. **Save** for sales going forward, or **Save & update transactions** to fix past sales too.
5. For a set period, tick **Use time range** first.

When a rate changes

Components need update

Rundoo raises the combined rate on its own, because it follows the address. Your split is now short. Open the rate, fix the components until it reads **All assigned**, then update the sales made since the change.

Bulk update: Admin, Locations, Download tax rates, edit, then Import tax rates. Never change column A. In columns F, G, and H, keep the order matched and separate items with a semicolon and no spaces.