Rundoo

GETTING STARTED WITH RUNDOO · SETUP

Sales Tax Components

> Split your sales tax into the city, county, state, and district parts you remit. The customer still pays one number.

Step-by-step walkthrough ~3 min read Companion to the Sales Tax Components video

DO THIS

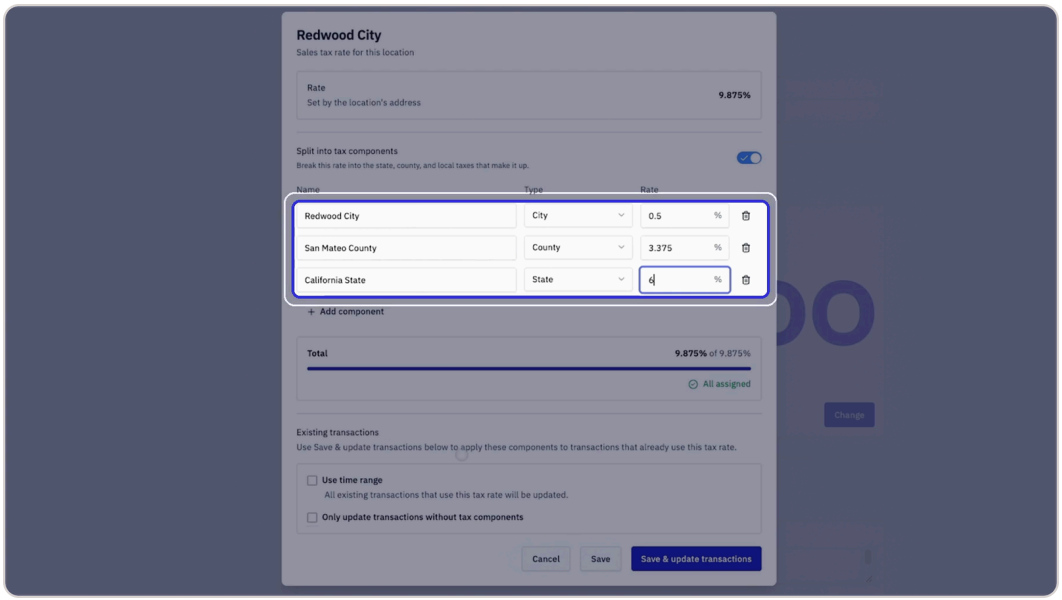
Split a location's sales tax

1 Open the location's sales tax rate

Go to **Admin**, then **Locations**, and open your location. Under **Sales tax**, click the rate and turn on **Split into tax components**.

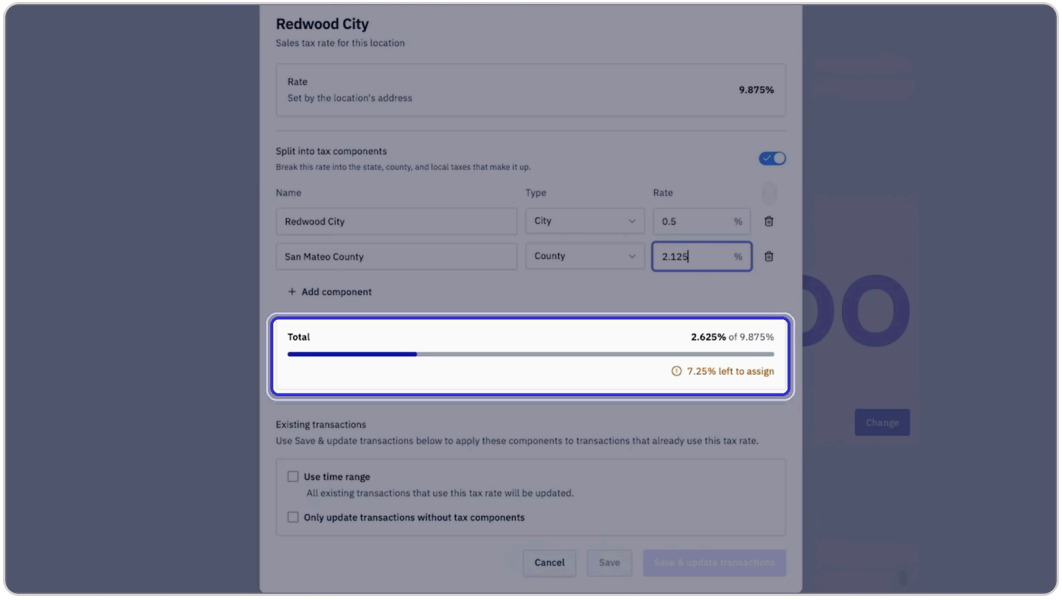
2 Add each component

Click **Add component** and give each one a **Name**, a **Type** (State, County, City, or District), and a **Rate**.



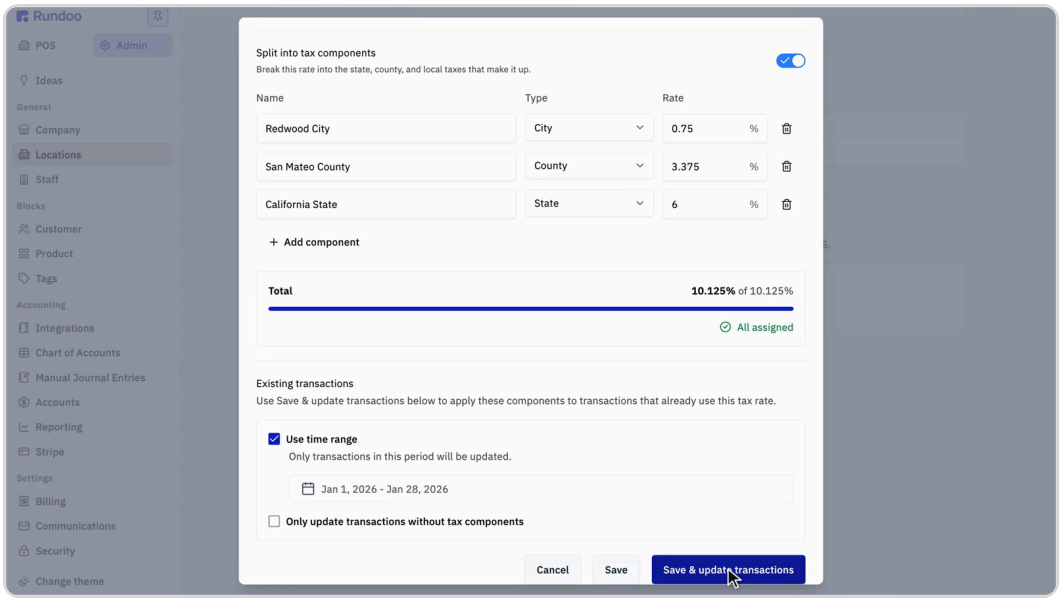
3 Make them add up

The **Total** line shows what is left to assign. Keep going until it reads **All assigned**.



4 Save, and decide about past sales

Save applies the components to future sales. **Save & update transactions** also applies them to past sales on this rate. Tick **Use time range** to limit that to certain dates.

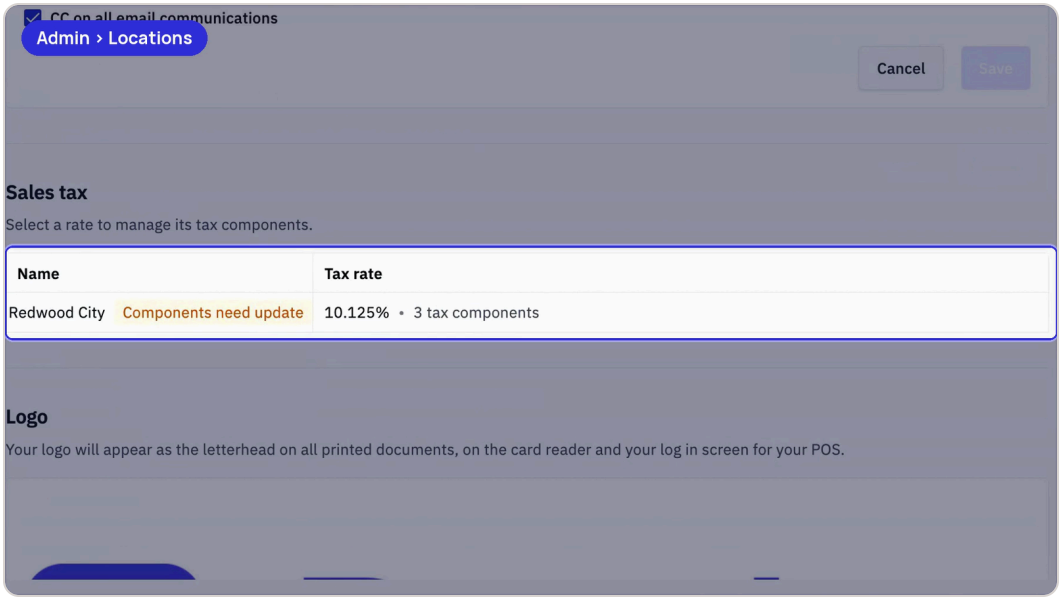


WHEN A RATE CHANGES

Rundoo updates the rate. You update the split.

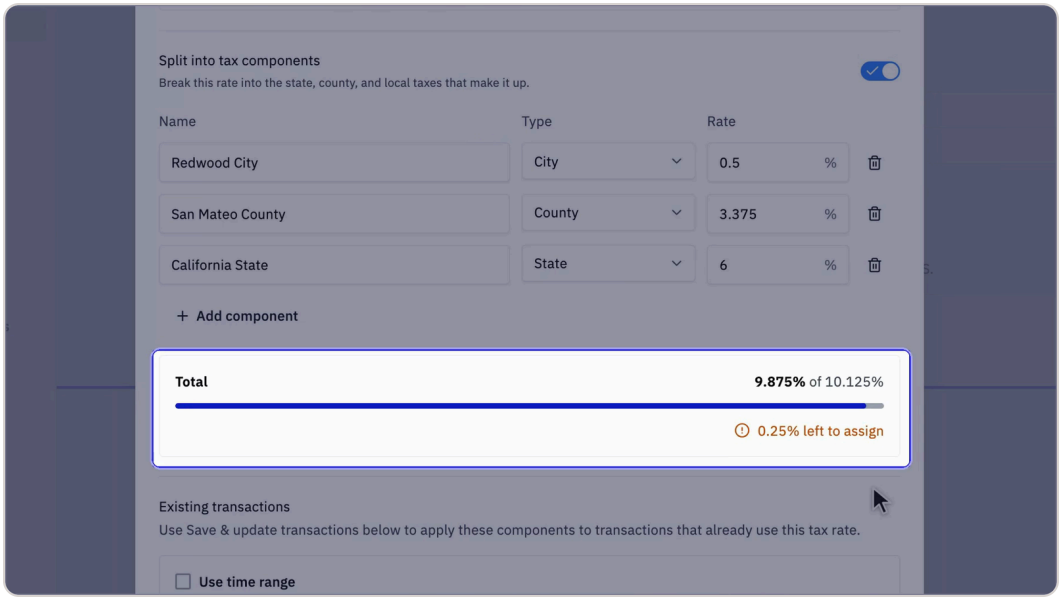
1 Watch for the warning in Admin

When a tax rate changes, the combined rate updates on its own. Your components are then short, so the location shows **Components need update**.



2 Fix the components

Click the rate and edit, add, or delete components until the Total reads **All assigned**. Then **Save**, or **Save & update transactions** to correct sales made since the change.

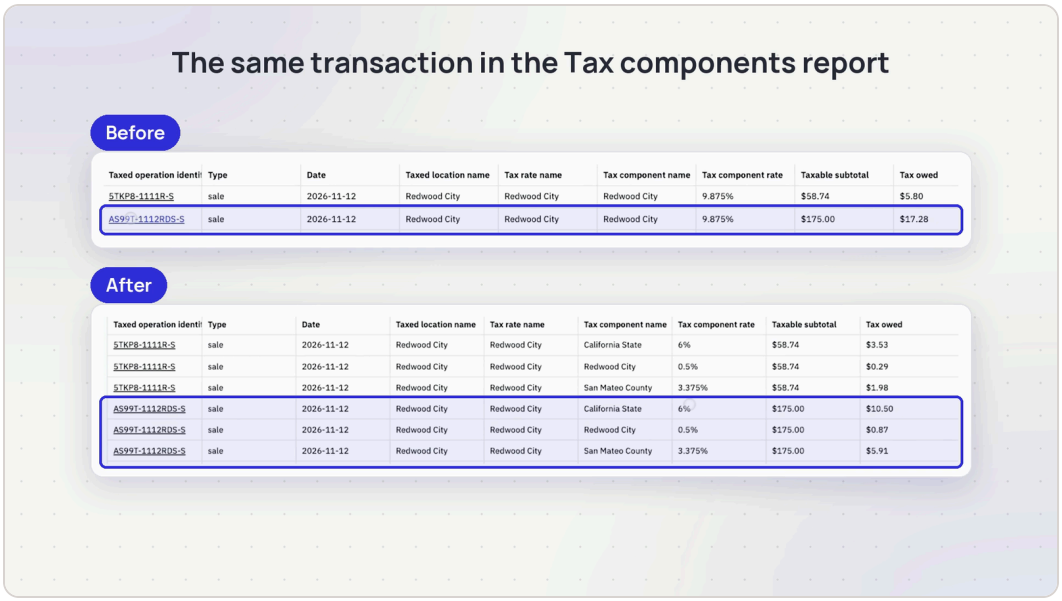


SEE IT IN REPORTS

One row per component

1 Create the Tax components report

Go to **Reports**, click **Create report**, and pick **Tax components**.



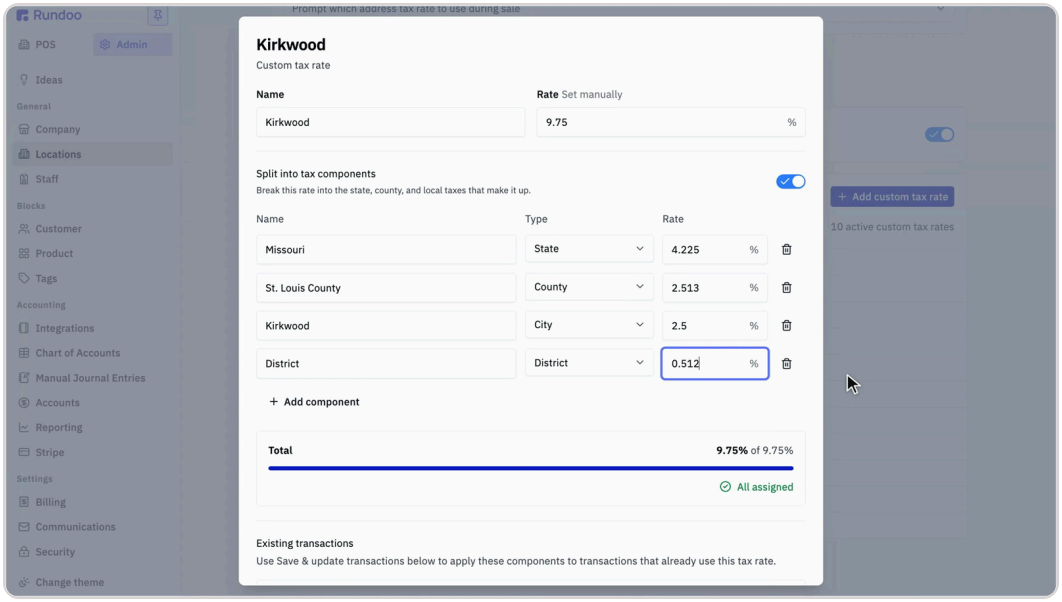
Before: one row at the combined rate. After: a row for each component.

CUSTOM TAX RATES

The same breakdown for rates you set yourself

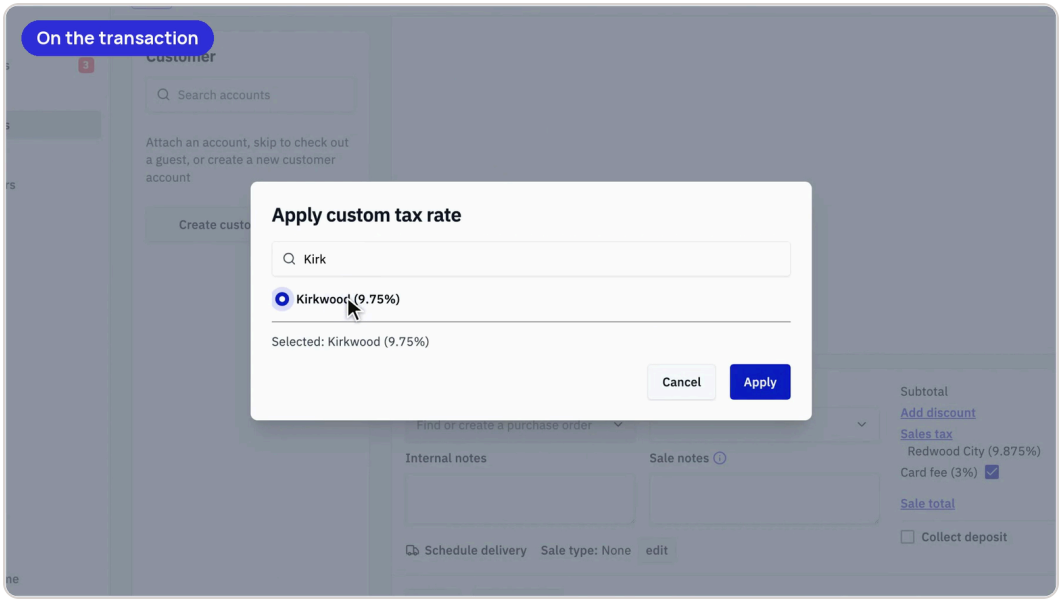
1 Set up a custom tax rate

In **Admin**, **Locations**, scroll to **Custom tax rates** and click **Add custom tax rate**. Name it, set the rate, and save. Then open it and turn on **Split into tax components**.



2 Apply it on a sale

On the transaction, click **Sales tax**, pick the custom rate, and click **Apply**.

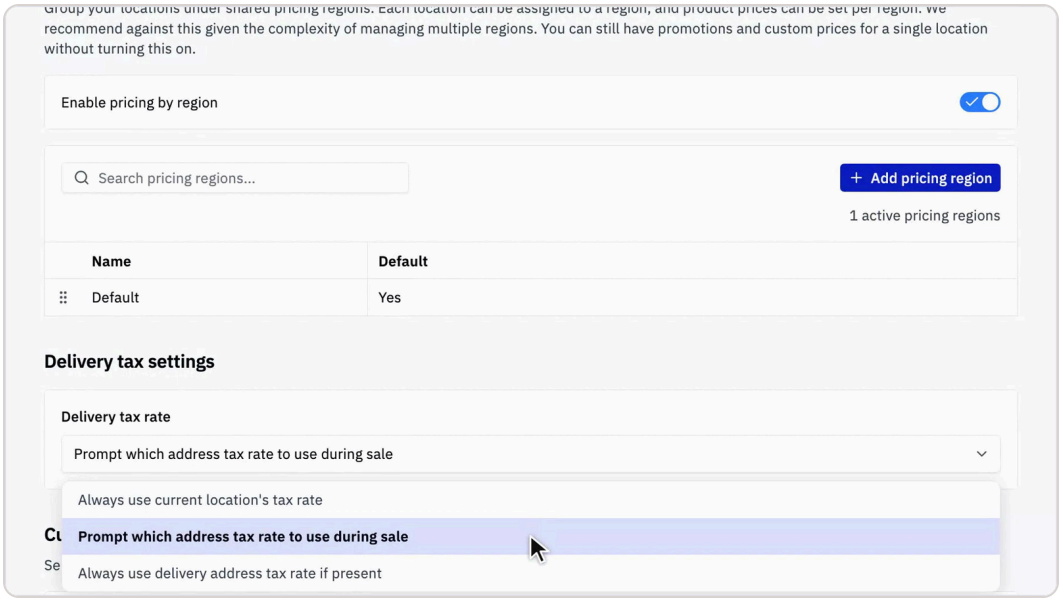


DELIVERY ADDRESS TAX RATES

Let Rundoo suggest the rate and its components

1 Choose how deliveries are taxed

In **Admin**, **Locations**, find **Delivery tax rate** and pick one of the three options.

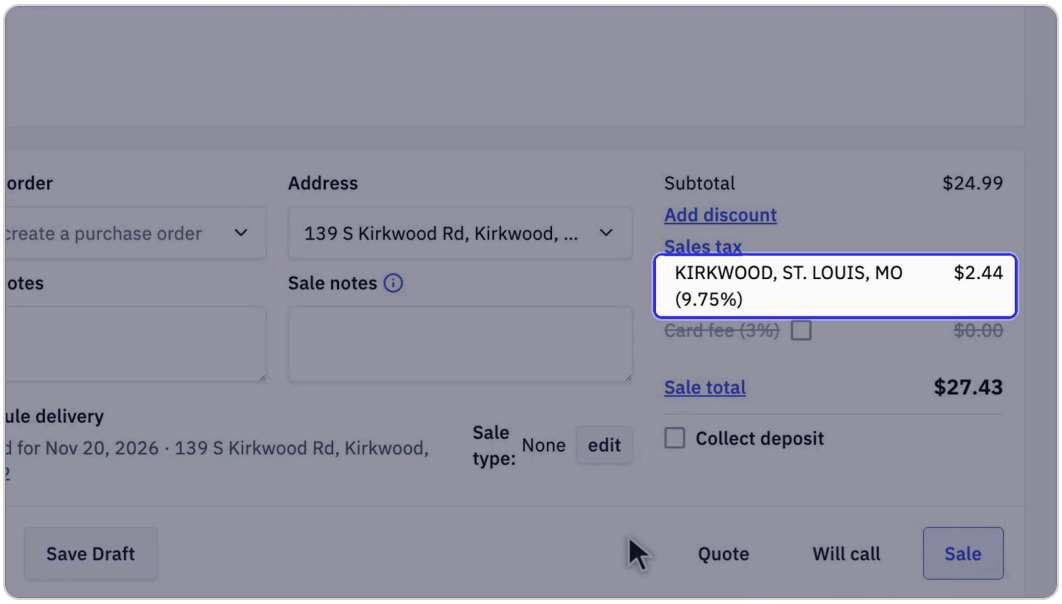


2 Turn on component recommendations

Under **Custom tax rates**, turn on **Use TaxJar component recommendations**. New delivery address rates then start with suggested components.

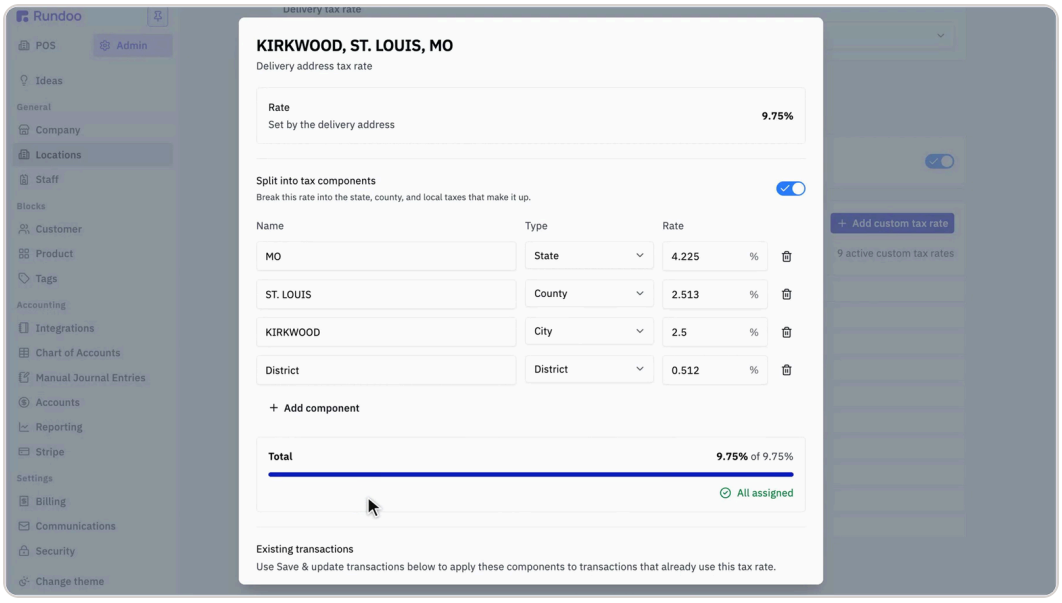
3 Schedule a delivery

On a sale, click **Schedule delivery**, enter the address, and click **Stage for delivery**. The sales tax switches to the delivery address rate.



4 Check or correct the suggested components

The delivery address now appears under **Custom tax rates**. Click it to check the breakdown. If something is off, fix it and click **Save & update transactions**.



BULK UPDATE BY SPREADSHEET

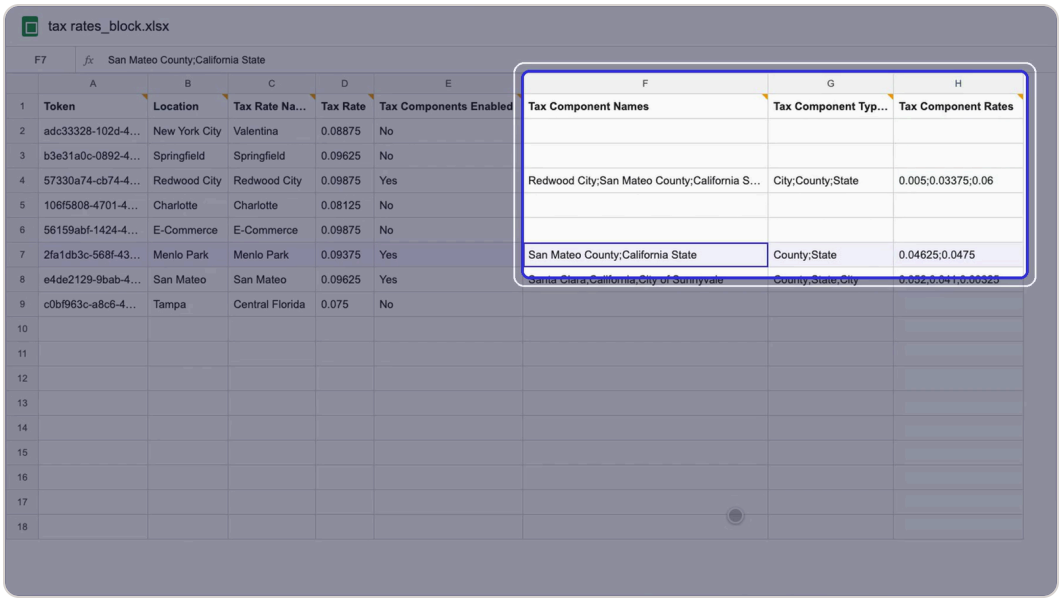
Every rate and component in one go

1 Download your tax rates

In **Admin**, **Locations**, click **Download tax rates**.

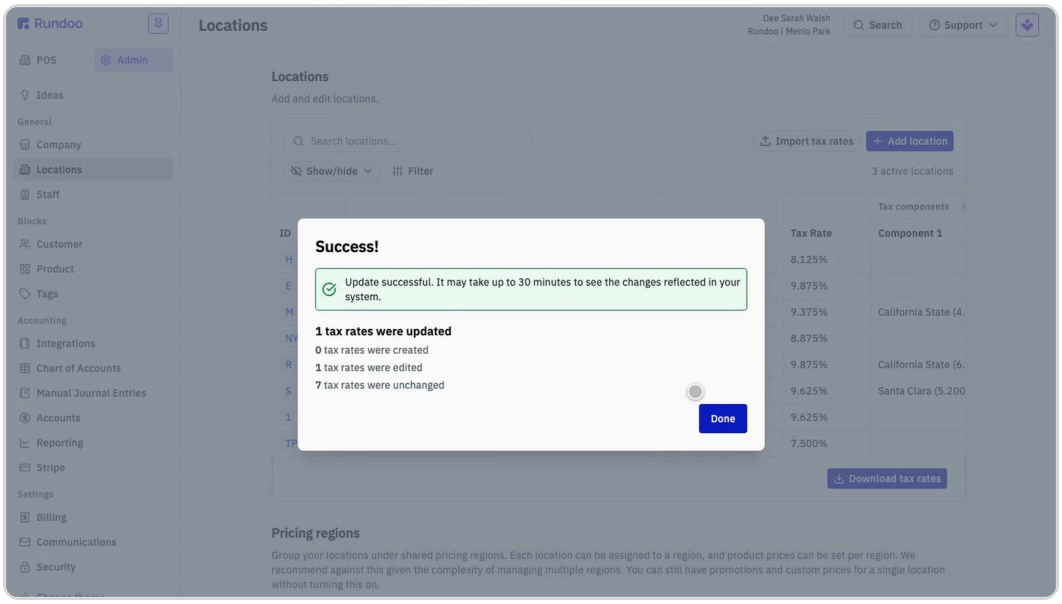
2 Edit the spreadsheet

Column E turns components on or off. Columns F, G, and H hold the names, types, and rates, in matching order, separated by semicolons with no spaces. Do not change column A.



3 Upload it

Click **Import tax rates** and upload the file. On success, refresh Locations. If you get an error, download the error report, fix it, and try again.



Good to know

- Components never change the tax a customer pays, only how it is broken down in your reports.
- Components must add up to the total rate, or Rundoo will not let you save them.