

Tax Calculations

Overview

You can configure the system to handle tax calculations efficiently. The tax calculation settings determine whether tax rates should be applied in a specific case and provide appropriate labels.

Enter all tax calculation types you need for national and international billing and assign them to your Sales and Purchasing master data.

For special cases, assign a specific tax rate. This rate overrides the standard rate set in your Items or Media Items and applies to billing documents linked to the corresponding master data. For example, you can bill a specific author at **19%**, even if the standard rate is **7%**.

Tax Calculations / Overview

Edit ▾

Quick Search Filter Sorting Views ▾ Export

	ID	Name	Tax is Charged	Description ↓
	9	German VAT 19%	✓	VAT for Germany is 19%
	3	UK VAT 20%	✓	Standard rate of VAT in UK is 20%
	6	Taxable	✓	Tax will be charged
	7	Not Taxable		Tax will not be charged
	8	Italian VAT 22%	✓	VAT for Italy is 22%

Tax Calculations overview

Set up tax calculation types

Configure all tax calculation types you need in the system. These will be available as selectable options wherever relevant.

1. Navigate to **Finance > Tax Rates and Calculations > Tax Calculations**, then select **Edit > New**.

2. Fill out the following fields:

- **Name:** Specify the label for the tax calculation.
- **Calculation:** Use the radio button to define whether a tax is applicable (**Yes** or **No**).
- **Yes** means that, where relevant, the associated Customer, Partner or Author should be charged the tax; **No** means they should not be charged the tax.
- **Special Tax Rate:** Enter an alternative tax rate for special cases.
- **Language:** Provide the label for the tax calculation in each financial language you've defined under **Administration > Language Settings > Languages**.

3. Click **Save**.

▼ General Data

Name: *

Taxable 7%

Calculation:

☒ yes
☐ no

Special Tax Rate:

VAT 7% ▼

▼ Language

English (USA): *

Taxable

German: *

Steuerpflichtig

▼ Description

7% tax will be charged

Cancel and Back to Overview

Save

*Tax Calculation setup dialog***Note**

To learn how to activate more languages for Finance, refer to the [Languages](#) FAQ.

Select tax calculation on a master data record

Assign your tax calculation types to Sales and Purchasing master data records to define how taxes should be applied for customers, partners, authors, author pools, and syndications.

1. Navigate to a master data record under **Sales** or **Purchasing**.
2. In the **Finance Data** section, choose a record from the **Tax Calculation** dropdown.
3. Click **Save**.

The screenshot displays the 'Master Data' record form. The top navigation bar includes tabs for 'Master Data', 'Contacts', 'Contact History', 'Accesses', 'Outputs', 'Prices', 'Financial Documents', 'Lightboxes', and 'Document Management'. Below this, a secondary bar shows 'Common Data', 'Addresses', 'Finance', 'Bank Accounts', 'Marketing', and 'Custom Fields'. The main form is divided into several sections: 'Master Data' (with fields for Number: CU000196, ID: 914, Match Code, and Customer is Active: Active for Login and Finance), 'Sales' (with Salesperson 1, 2, and 3 dropdowns), 'Address Data', 'Communication', 'Comments', and 'Finance Data'. The 'Finance Data' section contains dropdowns for Language, ERP Language, ERP Currency, ERP Currency Rate, and Tax Calculation. The 'Tax Calculation' dropdown is highlighted with a red box and set to 'Taxable'.

Customer master data - Tax calculation selection

Configure master data templates

If you use the same billing settings often, create master data templates in **Finance > Templates > Master Data Templates**. When you create a new master data record, the system automatically pre-fills the relevant fields with your default values. This is especially useful for mandatory fields.

When you create a new master data record or modify existing data, you can choose to override the defaults.

Master Data Templates

Customers, Partners (Debtors) Authors, Partners, Author Pools, Syndicates (Creditors)

<< < 1 (1) > >> Back to Overview Edit ▾

▼ Master Data

Template Name: *

☒ Apply this template automatically to new records created in BACKSTAGE

☐ Website Default

▼ Country-Based Assignment for Web Registrants

☐ Country-Based Assignment for Web Registrants

▼ Finance-Data Settings

Language: ▾

Currency: ▾

Currency Rate: ▾

Tax Calculation: ▾

E-Invoice Type: ▾

Master Data Template > Debtors tab: Apply this template automatically to new records created in Backstage

Customers / Editing 'CU000196 Test Customer' Customer

« < 1 (72) > » Back to Master Data Overview Edit ▾ **Templates ▾**

Master Data Contacts Contact History Accesses Outputs Pr

Common Data Addresses Finance Bank Accounts Marketing

▼ Master Data

Number: CU000196

ID: 914

Match Code:

Customer is Active: ☒ Active for Login and Finance ☐ Blocked for Login and Finance

Add Financial Master Data Template: My Default (1_Webgate 1.0)

Add Financial Master Data Template: unnamed (4_Corporate)

Add Financial Master Data Template: Default (3_Creative)

Add Financial Master Data Template: Default (2_Editorial)

Add Financial Master Data Template: [Domestic] Italian (3_Creative)

Add Financial Master Data Template: [Foreign] German (3_Creative)

Customer master data window: Templates menu

Manage tax calculations

You can manage your tax calculations in **Finance > Tax Rates and Calculations > Tax Calculations**. The following functions are available:

Create a new tax calculation

Select **Edit > New** from the menu.

Edit an existing tax calculation

Double-click the entry or select it, click **Edit > Open** from the menu.

Copy an existing tax calculation

Select the entry you want to copy and click **Edit > Copy** from the menu.

Delete an existing tax calculation

Select the tax calculation you no longer need and click **Edit > Delete**.

Note

You can search, filter, and sort data records with the integrated table functions. To learn more about these functions, as well as how to set up custom views or use the export function, refer to the [Advanced Table View](#) FAQ.