

# Basic Tax Setup

Last Modified on 05/29/2025 10:50 am MDT

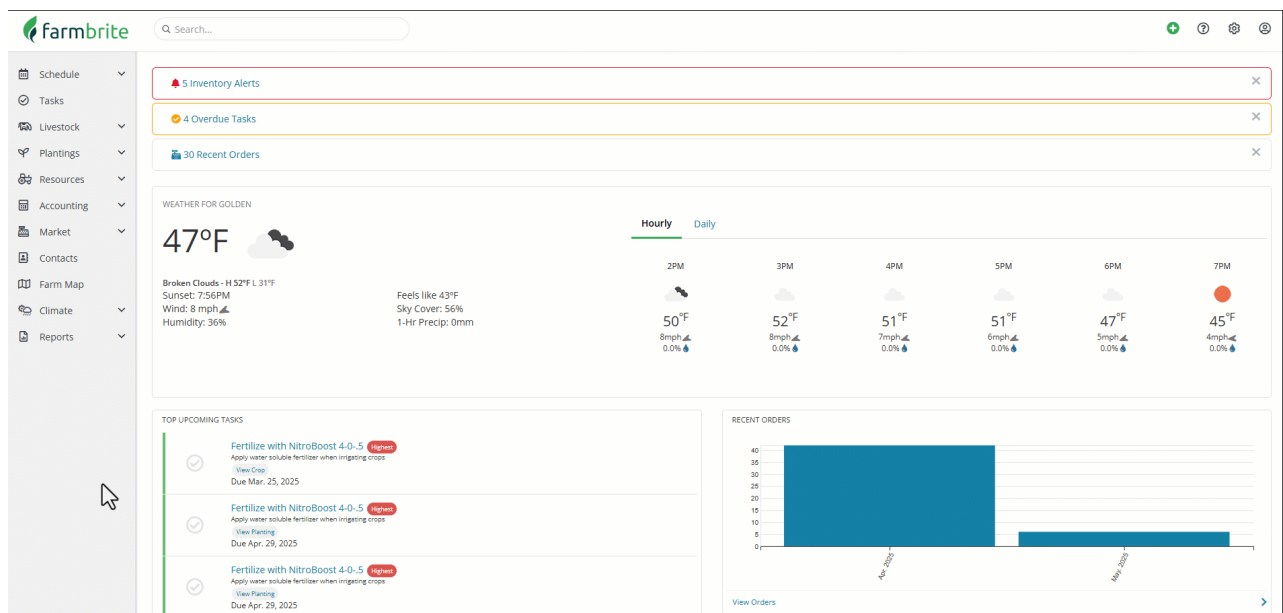
If you need to charge taxes on the products you sell in your market, you can define a Basic tax rate that applies a tax percentage to your orders. This rate applies to orders you create manually within the software, through the Farmbrite POS, or through your online store. You'll find it easy to define this rate and start charging your taxes appropriately.

A few things you should be aware of before we go over how to set this up:

- You can define a override tax rate on any product if it should be taxed differently than the default rate.
- You can override the tax rate for any order individually with whatever rate you'd like to apply.
- You can also additionally set up [Advanced Tax Rates](#) that are used specifically for your Online Store credit card purchases. This can be done through Stripe, Farmbrite's credit card processing partner. This can automatically calculate the correct tax rate to apply to the order based on your customer's address and your product configuration. Overall, this helps account for shipping or delivering products to different areas than where your business is located.

## Defining Your Tax Rate

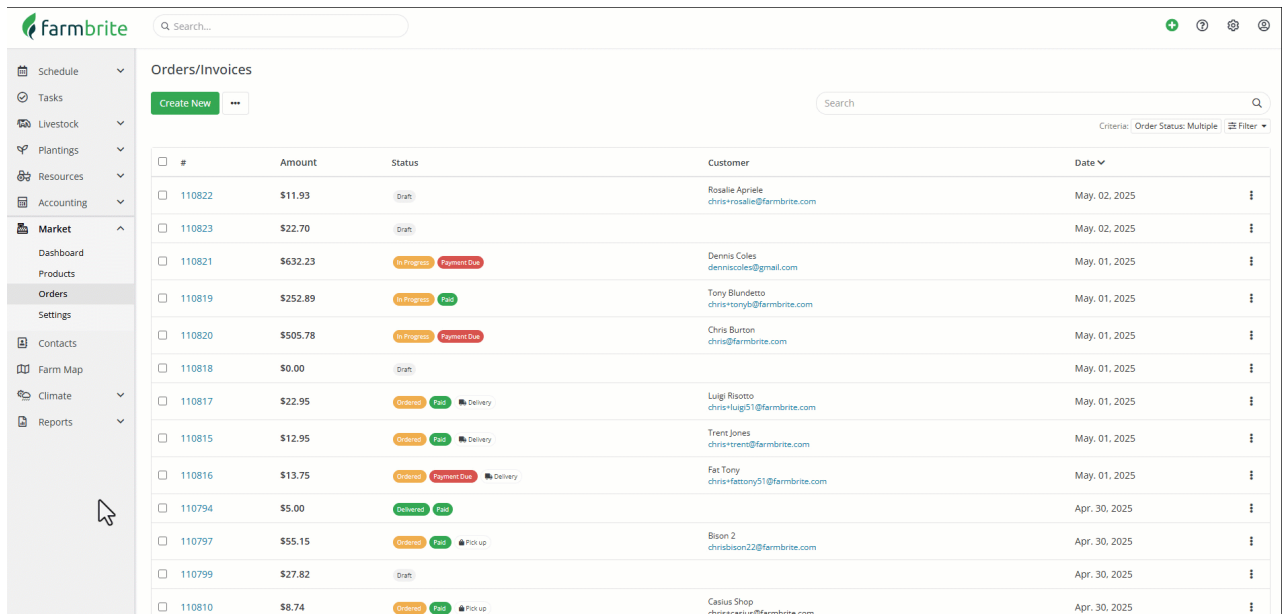
To set up your basic default tax rate, navigate to the market section and choose Settings. You'll find it under the Taxes, Fees, and Accounting section. In our example below we are applying a 8.2% Basic Default Tax Rate.



## Where the Default Tax Rate is Applied

The default tax rate will be applied when you create orders. This is true for orders you create administratively from the Orders tab, orders you add from the Farmbrite POS, and orders submitted through the online store. It is applicable to cash, check, and credit card purchases on all three. *Tip: Setup [Advanced Taxes](#) to use for credit card payments in your online store if you need more accurate rates based on a customer's location. The default tax rate will be used for credit card transactions if you do not enable this advanced feature.*

The image below shows the 8.2% tax rate being calculated on different order entry methods.

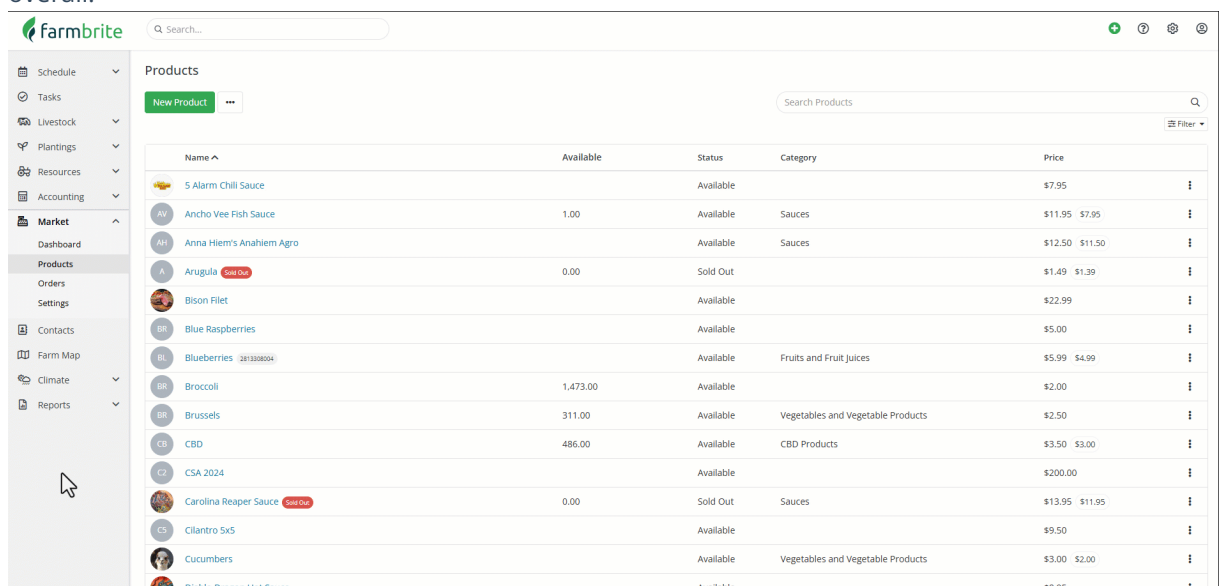


#	Amount	Status	Customer	Date
110822	\$11.93	Draft	Rosalie Apriele chris+rosalie@farmbrite.com	May. 02, 2025
110823	\$22.70	Draft		May. 02, 2025
110821	\$632.23	In Progress Payment Due	Dennis Coles denniscoles@gmail.com	May. 01, 2025
110819	\$252.89	In Progress Paid	Tony Blundetto chris+tonyb@farmbrite.com	May. 01, 2025
110820	\$505.78	In Progress Payment Due	Chris Burton chris@farmbrite.com	May. 01, 2025
110818	\$0.00	Draft		May. 01, 2025
110817	\$22.95	Ordered Paid Delivery	Luigi Riosoto chris+luigi51@farmbrite.com	May. 01, 2025
110815	\$12.95	Ordered Paid Delivery	Trent Jones chris+trent@farmbrite.com	May. 01, 2025
110816	\$13.75	Ordered Payment Due Delivery	Fat Tony chris+fatony51@farmbrite.com	May. 01, 2025
110794	\$5.00	Delivered Paid		Apr. 30, 2025
110797	\$55.15	Ordered Paid Pick up	Bison 2 chrisbison22@farmbrite.com	Apr. 30, 2025
110799	\$27.82	Draft		Apr. 30, 2025
110810	\$8.74	Ordered Paid Pick up	Casius Shop chris+casius@farmbrite.com	Apr. 30, 2025

## Overriding the Default Tax Rate

If the default tax rate applies to most of your products and orders, but some need to be taxes differently, you'll have two options for overriding the taxes.

1. **Set a Product Tax Override Rate** - You can add a unique override rate for each product within it's product setup. This is always used for this product when it is added to an order, whether through the POS, Online Store, or Admin Orders (unless using Advanced Tax for credit card payments in the online store). If added with other products, the override rate is only used for the product it is associated with; other products on the order use the default rate (or their own override rate). In the example below, we have added a 0% rate to our blueberries, and see them untaxed when adding them to the order. After adding the hot sauce, we then see a blended rate calculated for the order overall.



Name	Available	Status	Category	Price
5 Alarm Chili Sauce		Available		\$7.95
AV Ancho Vee Fish Sauce	1.00	Available	Sauces	\$11.95 \$7.95
AH Anna Hiem's Anaheim Agro		Available	Sauces	\$12.50 \$11.50
A Arugula	0.00	Sold Out		\$1.49 \$1.39
Bison Filet		Available		\$22.99
BR Blue Raspberries		Available		\$5.00
BL Blueberries		Available	Fruits and Fruit Juices	\$5.99 \$4.99
BR Broccoli	1,473.00	Available		\$2.00
BR Brussels	311.00	Available	Vegetables and Vegetable Products	\$2.50
CB CBD	486.00	Available	CBD Products	\$3.50 \$3.00
C2 CSA 2024		Available		\$200.00
Carolina Reaper Sauce	0.00	Sold Out	Sauces	\$13.95 \$11.95
C5 Cilantro 5x5		Available		\$9.50
Cucumbers		Available	Vegetables and Vegetable Products	\$3.00 \$2.00
Diablo Dragon Hot Sauce		Available		\$8.95

2. **For admin orders, you can update the rate on the order itself.** Regardless of the default or

override percentages, if you'd like to define your own tax rate for an order. Using the same example as above, we can click the Taxes link and input whatever rate needed for this order.

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Search...

Orders / 110825

#110825

Add Product

Quantity

Custom Price

Q

1

\$

Or create a new product

Add to Order

Order Details

Product	Price	Qty	Total
Blueberries	\$5.99 / Pound	1.0	\$5.99
5 Alarm Chili Sauce	\$7.95	1.0	\$7.95
Products	\$13.94		
Discount	-\$0.00		
Subtotal	\$13.94		
Shipping & Delivery	\$0.00		
Taxes (4.68%) <small>Taxes vary by item</small>	\$0.65		
<b>Total</b>	<b>\$14.59</b>		

Customer Message

Customer

Q

+ Add another contact

Date Ordered

05/02/2025

Order Status

Draft

Payment Status

Due

PO Number

Payment Method

Delivery Details

Delivery Type

Delivery Date

mm/dd/yyyy

## Tax Reporting

**You'll see taxes separate from product prices on your Completed Orders report.** This is the best place to see your taxes overall, but you can also add the Tax Amount field to a custom report to see it reflected for all orders. Be careful, as orders can be edited and updated before they are complete which may cause the taxes to change.

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Business Overview

Profit & Loss

Spending by Category

Tax Summary

Profit & Loss by Month

IRS Schedule F Summary

Financial Performance

Balance Sheet

Cash Flow Statement

Crop Breakeven

Crop Transactions

Livestock Breakeven

Livestock Transactions

Want to do more with reporting? [Build a custom report](#)

Let us know if you have any additional questions as you start adding taxes to your orders!