Taxes, Delivery Fees, and Why Totals Change

Accounting and Tax | Owners, managers, and bookkeepers

Set up stacked tax rates, customer exemptions, product taxability, and delivery-fee rules so FlintPOS calculates the right total and staff can explain why it changed.

What This Guide Helps You Do

- Trace each price, tax, and delivery fee to the setting that controls it.
- Configure tax rates and fee settings so staff can trust the checkout total.
- Explain total changes without guessing or overriding the order by hand.

START WITH THE RULE FLINTPOS IS ENFORCING

FlintPOS does not treat sales tax as a number the cashier types. It recalculates from the saved rules every time the customer, product, order type, or destination changes. Price is resolved first, then tax is applied only to taxable items, and delivery fees are calculated from the selected address and store settings.

- Customer type can change the product price before tax is calculated.
- Customer tax-exempt or resale status can remove tax entirely.
- Product taxability still matters. A non-taxable item stays non-taxable even on a taxable order.
- Delivery orders use the possession address, so changing the destination can change both fee and tax.

SET UP TAX RATES IN SETTINGS -> TAX RATES

Open Settings and use the Tax Rates tab to build the tax map FlintPOS will stack automatically. Each row represents one authority. State, county, and city rows are not merged by hand. FlintPOS adds every matching row together when the address matches.

1. **Choose the reporting basis first**
   Pick Accrual if you remit tax when the sale happens. Pick Cash if you remit tax when you collect payment, including partial payments on account.
2. **Enter each rate as a decimal**
   Use 0.05 for 5 percent and 0.005 for 0.5 percent. Add the state row first, then add county and city rows as separate entries.
3. **Match the jurisdiction fields to where the rate applies**
   Leave county blank for a whole-state rate. Add county for county-only tax. Add city only when that municipality has an extra layer on top of the state and county rows.
4. **Delete stale rows instead of leaving duplicates around**
   If a rate changed, replace the old row cleanly. FlintPOS stacks matching rates, so duplicate active rows will overcharge tax.

> **Decimal input rule**
> The Tax Rates screen expects decimals, not whole percentages. A 5 percent state tax must be entered as 0.05.

CUSTOMER TAX FIELDS DECIDE WHETHER TAX APPLIES AT ALL

Customer tax status lives on the customer record. Resale customers are treated as tax exempt because they collect tax from their own buyers. Standard tax-exempt customers should have the certificate details saved on the account before staff relies on the checkbox.

1. **Use Resale for customers who resell the material**
   This is the strongest tax override. FlintPOS treats resale customers as non-taxable even if the normal tax-exempt box is off.
2. **Use Tax Exempt for direct exemption cases**
   Turn it on only after you have the supporting paperwork. Save the certificate number on the customer so office staff can verify it later.
3. **Fix the customer record instead of overriding one ticket**
   If the customer should not be taxed, correct the saved account and let FlintPOS recalculate the order. Do not try to fake the same result with manual discounts.

PRODUCT SETUP STILL CONTROLS WHICH LINES CAN BE TAXED

The Taxable checkbox on the product decides whether that line can ever receive tax. FlintPOS recalculates tax for the order, but it still respects item-level taxability.

- Taxable products receive the resolved jurisdiction rate unless the customer is exempt or resale.
- Non-taxable products keep a zero tax rate even when the rest of the order is taxable.
- If a product is consistently wrong at checkout, check the product record before blaming the customer or the tax table.

PICKUP AND DELIVERY DO NOT SHARE THE SAME TAX ADDRESS

For in-person sales, FlintPOS falls back to the sale or store location. For delivery orders, FlintPOS uses the drop location because that is where possession happens. That is why changing an order from pickup to delivery can change tax even when the cart contents stay the same.

1. **Expect pickup orders to use the store side of the rule**
   Walk-in, will-call, and normal counter transactions use the store or recorded sale location unless you convert the order into a delivery.
2. **Expect delivery orders to use the destination address**
   FlintPOS pulls the delivery address from the selected saved address or the delivery snapshot and matches tax rows against that jurisdiction.
3. **Treat address edits as a tax event**
   If the city, county, or state changes, FlintPOS should recalculate tax and the delivery fee. Staff should pause and let the order update before quoting the final total.

SET DELIVERY FEE RULES IN DELIVERY SETTINGS

Open Settings -> Delivery to define how FlintPOS quotes delivery fees. That section controls portal delivery behavior, whether customer discounts apply to delivery fees, optional split-load surcharges, and the tier table used for quoting.

1. **Build the fee tiers with labels, ranges, and one metric**
   Create each tier with a label, a fee amount, and either miles or route minutes. FlintPOS uses the configured tier table instead of a cashier guessing the fee.
2. **Decide whether customer discounts should reduce delivery fees**
   If Apply customer discounts to delivery fees is on, the customer discount percent will hit the fee line too. If it is off, delivery is always charged at the full fee.
3. **Set portal contractor and wholesale delivery rules intentionally**
   Portal orders can always charge, always waive, or waive only up to the customer shop distance. Pick one policy before you invite customers to self-serve.
4. **Use the additional load fee only when the store wants it visible at scheduling time**
   If you set an amount and label, the delivery modal can add that surcharge as a named line item for split loads or multi-product trips.

RETAIL, CONTRACTOR, AND WHOLESALE AFFECT PRICE BEFORE TAX

Customer type does not directly set a tax rate. It changes which product price FlintPOS tries first. Retail customers use the base product price. Contractor customers use the contractor tier when the product has one. Wholesale customers use the wholesale tier when the quantity and increment rules qualify; otherwise FlintPOS can split the order so full-load quantities get wholesale price and the remainder falls back to contractor price.

- Price changes happen before tax is calculated.
- A discount percent can stack on top of the resolved tier price.
- If a wholesale total looks strange, check the minimum quantity and increment rules on the product before changing the customer type.

USE A SHORT TROUBLESHOOTING CHECKLIST WHEN TOTALS MOVE

When the total changes unexpectedly, work the inputs in order instead of hunting randomly.

1. **Check the customer record**
   Confirm type, resale, tax-exempt status, and discount percent.
2. **Check the product record**
   Confirm taxable status, retail price, contractor price, wholesale price, and any full-load or wholesale rules.
3. **Check the order type and address**
   A delivery address change can alter both the fee and the stacked tax rate.
4. **Let FlintPOS recalculate instead of forcing a manual workaround**
   If the saved rules are wrong, fix the saved rule and re-run the order. Manual patches create reporting problems later.

Operator script

Your total changed because FlintPOS recalculated the price, delivery fee, or tax from the saved customer and address rules on this order.

Keep Going

Use the FlintPOS Docs hub to search for related guides by role, category, or job to be done. Open the interactive walkthrough at /quickstart/delivery-order.html when you want a screen-by-screen visual refresher.