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# Configure Tax on Charging sessions (Canada)

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## Introduction

ChargePoint allows customers to configure tax rules for charging sessions on stations activated in their account. This ensures that all relevant tax information appears on the display of the charging station, in the ChargePoint mobile app, and in partner apps that roam on ChargePoint stations. The configuration of tax rules affects the display of the pricing for a charging session in all of these end user (driver) touch points, and the tax information is included in the final session summary, which is used as the receipt.

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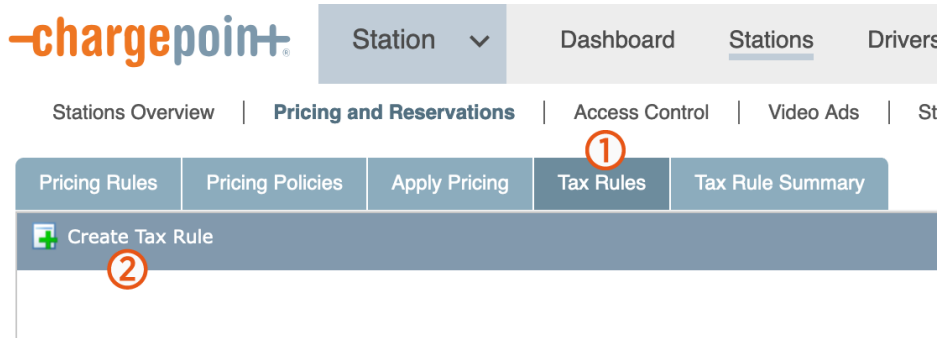
## Before You Begin

In order to use the Tax Rule feature to display and collect tax on charging sessions, your organization needs to have charging stations activated into your Organization on ChargePoint, and you need to have enabled Flex Billing so that you can collect fees for charging sessions. However, if you would like to just try out the Tax Rule configuration tool, follow the steps in this guide.

## Create a Tax Rule

1. In order to configure Tax Rules that will be applied to charging stations activated in your Organization login to [ChargePoint](#) as either the Network Manager, Station Manager, or Depot Manager role and click **Stations > Pricing and Reservations > Tax Rules**. If you already have Tax Rules configured in your Organization, this page will show them in the table view.

2. Click **Create Tax Rule**.



3. Select the **Organization** where the charging stations are activated that you would like to configure.

4. Enter a **Tax Rule Name** that you would like to use for your own tracking purposes, such as HST, GST, QST, etc.

5. The **Description** property is optional, and it is not displayed to the end user

6. In the **Text to Display to Driver** field, it is recommended to enter the name of the tax followed by your company tax ID, for example: "GST # 1234567890"

7. Enter the **Rate** for the tax, as a quick reference, you can get the sales tax rate for your province from [here](#)

8. If you are ready to Enable this Tax Rule on your stations, you can set the **Status** to Enabled.

9. The **Customer Tax Rule ID** is an optional field that you can use for your reference. It is also not displayed to the end user.

10. For each Tax Rule, you can easily apply it to all stations in a given Province. To do this, under the Station filter section, choose **State** for the first filter and enter the name of the Province.

- o If you click **Recompute Now**, the system will determine which of the activated stations in your Organization match the filters that you have configured. Clicking on the **Stations** tab at the top will show you the list of the stations that matched.

11. Once you click **Save and Finish**, the Tax Rule will be automatically applied to all of the stations that match the Station filters that you have selected.

- o If you are not ready to push the Tax Rule to your stations, but you would like to save it, you can set the **Status** to Disabled, and then click **Save and Finish**.

**New Tax Rule**

Definition Stations

3 Organization My Company

4 Tax Rule Name Alberta Tax Rule

5 Description Sales tax for Alberta station

6 Text to Display to Driver GST #12345 6789 XY0009

7 Rate 5%

8 Status Enabled

9 Customer Tax Rule ID MY-ID-1234

**Stations**

State Contains Alberta

State/Province of Station Address

Add Filter

Match all Match any

Cancel Recompute Now Save and Finish

## Viewing Configured Tax Rules

Once Tax Rules have been applied to stations, the stations that have been configured with each rule can be viewed in the Tax Rule Summary page. On the charging stations and in the ChargePoint Mobile App, you can also see the tax information using the instructions below.

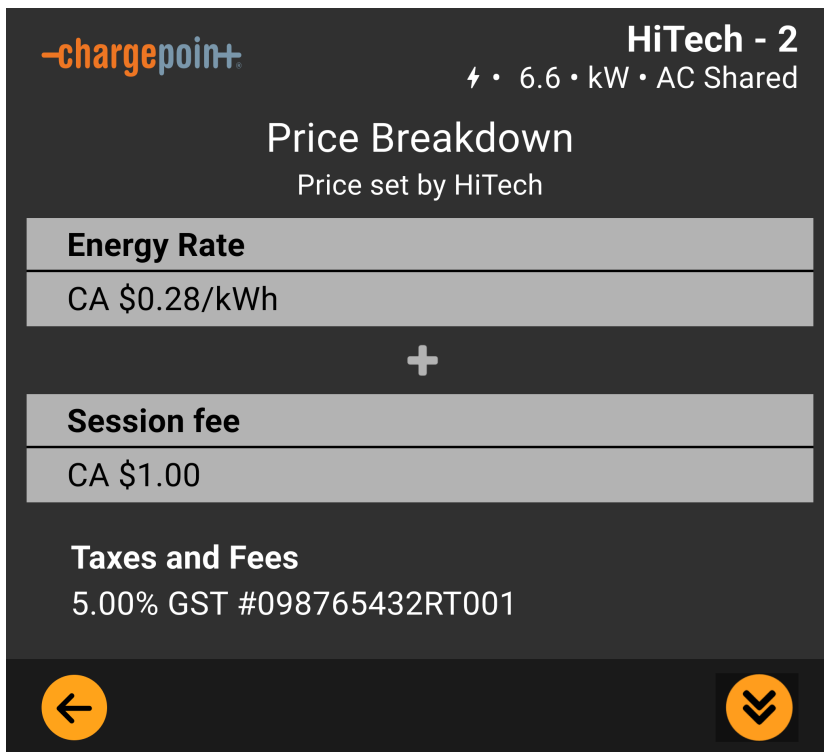
## Tax Rule Configuration Summary

1. Login to [ChargePoint](#) and click **Stations > Pricing and Reservations > Tax Rule Summary**.
2. Each row of this table will display the station name, address, and tax rule details that have been configured.

## Tax Rule Display on Charging Station Screens

On ChargePoint stations, you can view the tax details using these steps.

1. Click the Price button on the station.
  - o For a CT4000, use the button below the screen under Price.
  - o For other ChargePoint station models, touch the Price button the screen
2. When the price screen is shown you might need to scroll down to view the complete tax configuration
  - o For a CT4000, use the button below the screen labeled Down.



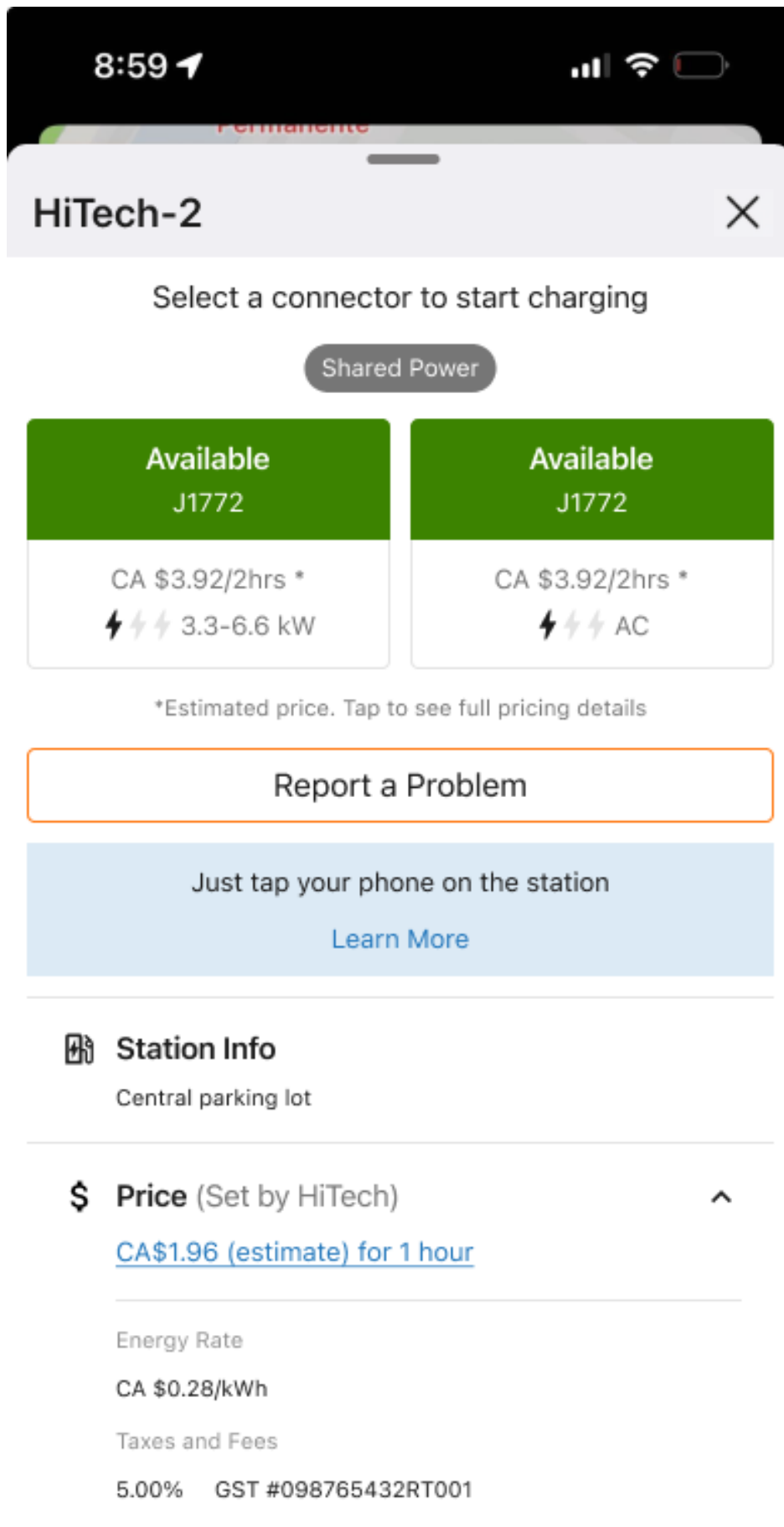
o For other ChargePoint station models, touch the Down button on the screen.

3. At the end of a charging session, the tax information will be shown on the screen with the summary of the session details.

## Tax Rule Display on the ChargePoint Mobile App

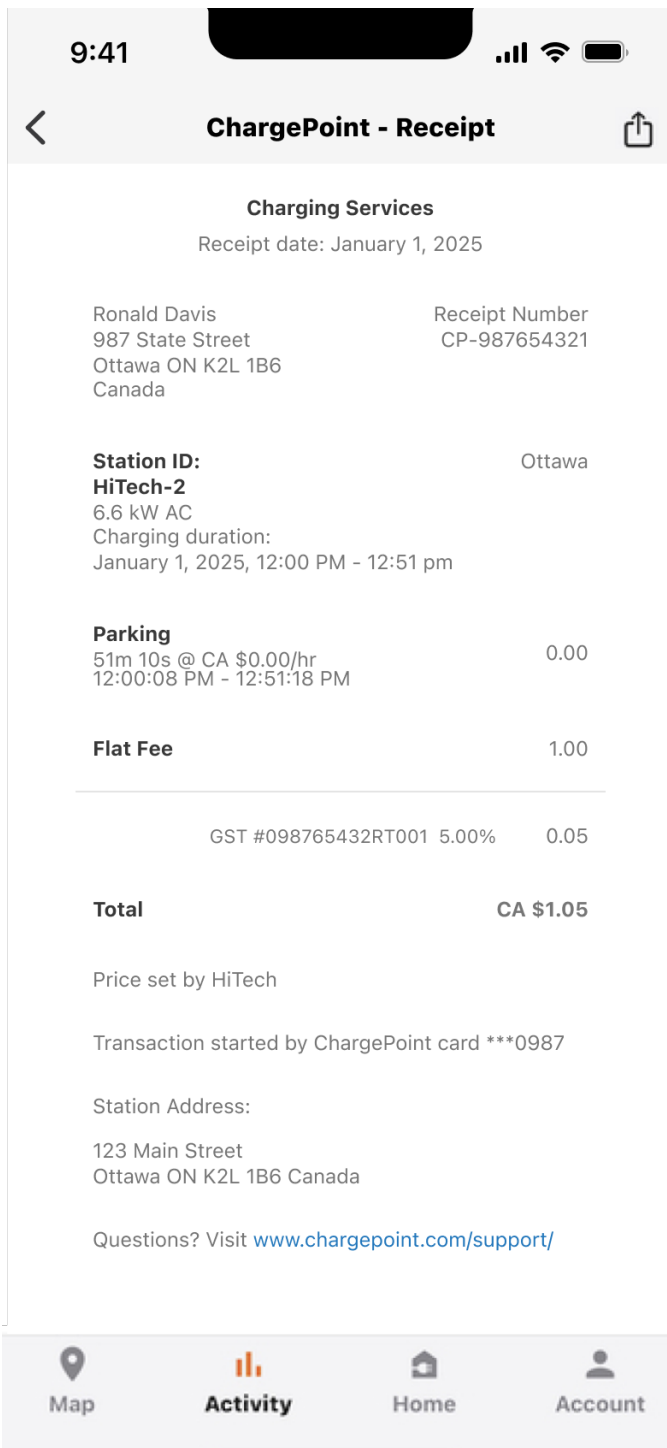
Drivers can view the tax applied to a station before they charge there by following these steps.

1. Opening the ChargePoint Mobile App
2. Find the station on the map and tap its icon
3. Scroll down to see the **Price** and click the ^ icon to display the detailed pricing information including configured taxes under the **Taxes and Fees** section.



At the end of a charging session, customers can view the receipt by following these steps.

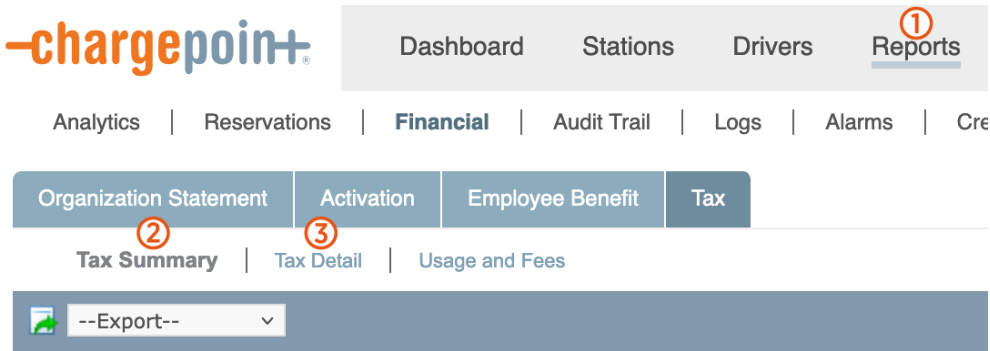
1. Login to the ChargePoint Mobile App
2. Tap Activity
3. Tap the charging session in the list
4. Tap Receipt > to view the full receipt including the full tax details as shown in the example below.



# Tax Reports

As drivers use your stations that have configured Tax Rules, the system will generate reports that you can use to help you remit taxes to your local tax authority. Use these steps to view these reports.

1. Login to ChargePoint and click **Reports > Financial > Tax**.



2. The **Tax Summary** report is generated at the end of the month, and it includes the total amount of tax collected from drivers and paid out to your organization for each Tax Rule that you have configured across all of your charging stations.

3. If you click **Tax Detail**, you can see the total amount of tax for each tax rule applied to every charging session where tax was applied. If you have stations that do not have pricing enabled, then you will not see those sessions in this table.



[chargepoint.com/support](https://chargepoint.com/support)

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