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Taxes and invoice numbers in WHMCS: tax rules, proforma invoices and repeated numbers

Choosing the Right Plan

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RLX Holdings (Pty) Ltd. · Group RLX Holdings

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<https://www.my.mozout.com/knowledgebase/6468>



This article is for resellers who run their own WHMCS. WHMCS is another company's product: we neither sell nor resell licences, as explained in **what WHMCS is**. Menu names change from one WHMCS version to the next. **The short answer:** WHMCS calculates tax and numbers invoices however you tell it to, but **it does not know your country's tax rules**. Decide first with your accountant whether you charge tax, whether your prices include it, and which document counts as the invoice. Then set it up: tax rules under **Tax Configuration**, numbering on the **Invoices** tab of the general settings. The most common mistake is having **two counters** switched on with the same format, which produces repeated numbers.

Where each thing lives

Setting	What it does
Tax Configuration: switch tax on	Without it no invoice carries tax, however the products are set.
Tax inclusive or exclusive	Whether the prices you show already contain the tax, or it is added at the end. See tax on a hosting invoice .
Tax rules	Which rate applies to which country or region. There are two levels, for anyone who must add two taxes.
"Apply Tax" on each product	Every product, domain and addon has to be ticked to carry tax. A forgotten one goes out without it.
Tax-exempt customer and tax number	In the customer profile you mark exemption and store the tax number that appears on the invoice.
Proforma invoices and sequential paid numbering	The unpaid invoice stays a proforma; the final number is given only when it is paid, and paid invoices run without gaps. See proforma invoice .
Number format	A pattern with parts such as {NUMBER} and {YEAR} , plus whatever text you want around them.

Setting it up without repeated numbers

1

Talk to your accountant before touching anything. Take three questions: do I charge tax on hosting? Do my prices include it? Can the unpaid document be a proforma, with only the paid one being the invoice?

2

Switch tax on and create the rules in **Configuration > System Settings > Tax Configuration**, with the rate your accountant gave you. Do not copy another country's rates.

3

Tick "Apply Tax" on every product, domain and addon that should carry tax, and confirm on a test invoice that the tax line appears.

4

Put your details on the invoice: on the **Invoices** tab of the general settings, the pay-to text (name, address, tax number) is what appears in the header.

5

Pick ONE way of numbering. If you switch on paid-invoice numbering and also custom numbering at creation, those are two separate counters. If both use the same format, the number an unpaid invoice got at birth can later be given to another customer's paid invoice.

6

If you need both, tell them apart: a different prefix in the format for unpaid ones (for example "PF") ends the confusion. Paid invoices keep their own clean series.

7

Check the starting number at the turn of each year if the format includes the year: the counter and the year have to change together.

Never renumber paid invoices that have already been sent. An issued tax document is not rewritten: it is corrected with another document, as your accountant directs. Changing the counter mid-year without a database backup is asking for a problem that cannot be undone.

WHMCS raises one invoice per payment method. If the same customer pays one service by bank transfer and another by a different method, they get two invoices. That is not a numbering fault: it is how WHMCS groups them.

Questions about the numbering of YOUR invoices with us, rather than those in your WHMCS? Ask us.

[Open a support ticket](#)

SEE ALSO

Tax on a hosting invoice in plain words: included, added or not charged

Proforma invoice: what it is, why the number changes when you pay, and which document to keep

Reseller hosting: starting out, pricing and billing

Payment gateways in WHMCS: modules, bank transfer and confirming payments by hand

WHMCS automation settings: when invoices go out, reminders, suspension and termination

Making and keeping your own backup, and testing that it works



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