Tax Rate Mapping

Moneybird Integration for Magento 2

This page explains how VAT reaches Moneybird for the Moneybird Integration. Magento decides how much VAT a line carries; Moneybird decides which rate it books under, and those are two different things. Here you connect the two: every Magento tax rule gets a Moneybird tax rate, and four fallbacks catch everything the rules do not cover — zero-rated sales, reverse-charged EU sales, exports. It also explains the order the module resolves them in, because that order is what keeps an intra-community supply out of your domestic zero rate.

Location: Accounting → Configuration → Tax Rate Mapping

Before you start

Press **Import Info** under **Stores → Configuration → Magmodules → Moneybird → Connection** first. Tax rates are read from your administration and stored per administration — until that has run, the dropdowns on this page are empty, and so are the fallbacks under Advanced.

Run it again whenever your bookkeeper adds a rate. Nothing is imported on a schedule: the rates you see are the ones from the last import.

The grid

One row per Magento tax calculation rule, so the list mirrors **Stores → Tax Rules**.

Column	What it is
ID	Magento tax calculation rule id
Name	The rule's name as you wrote it in Magento
Customer Tax Class	The customer tax class the rule applies to
Product Tax Class	The product tax class the rule applies to
Moneybird Tax	The rate this rule books under — a dropdown of your imported rates

Moneybird Tax is edited in place: click the cell, pick a rate, and it saves. There is no save button and no bulk edit; a rule you leave on `-- Please select` is simply unmapped.

What gets mapped where

Map the rules you actually sell under. A typical Dutch shop has two or three:

Magento tax rule	Moneybird rate

BTW 21%	The 21% sales rate from your administration
BTW 9%	The 9% sales rate
BTW 0% (export)	Your export rate, or leave it to the fallbacks below

The rates in the dropdown are your own — Moneybird names them per administration, and a rate that exists in one administration does not exist in another. That is also why switching administrations means mapping again.

The four fallbacks

Under **Stores → Configuration → Magmodules → Moneybird → Advanced → Default Tax Classes**:

With Tax — the rate for a line that carries VAT but whose tax rule is not mapped. This is the safety net for a rule you forgot, not a substitute for mapping.

No Tax — a line with no VAT that ships inside your own country.

EU No Tax — a line with no VAT shipping to another EU country: an intra-community supply, reverse charged. Moneybird needs this on its own rate, or the line lands in your domestic zero rate and your ICP declaration comes out short.

No EU No Tax — a line with no VAT shipping outside the EU: an export.

The order the module decides in

For every invoice line, in this order:

1. **Is it intra-community?** Zero VAT, an EU country, and not your own country. Then it takes **EU No Tax** and the rest is not consulted. This is decided first because such a line is also "zero VAT", and booking it as plain zero-rated is the mistake that is hardest to see afterwards.
2. **Does it carry VAT?** Then it takes what its tax rule maps to in the grid above.
3. **Is it zero VAT?** Then it takes **No Tax** or **No EU No Tax**, depending on where it ships.
4. **Anything left** takes **With Tax**.

If the resolved rate is empty — nothing mapped, fallback not set — the module leaves the field out of the invoice entirely rather than sending an empty one. Moneybird then applies your administration's own default. That will not fail, but it books under a rate nobody chose, so treat an unmapped line as something to fix rather than as a working setup.

Checking it worked

Sync one invoice and open it in Moneybird. Each line shows its rate; compare it with the rule Magento applied to that line.

The order tab under **Sales → Orders → [order] → Accounting** shows the same thing before anything is sent: **Dry run** renders the exact body, including the tax rate id per line. That is the cheapest way to check a mapping — no invoice is created and nothing reaches your books.

Common situations

Mixed rates on one invoice. Each line resolves on its own, so 21% products with 9% products on one invoice is fine.

Shipping on a different rate than products. Shipping follows the same route as a product line: its tax rule, then the fallbacks. If Magento taxes shipping at 21%, so does the booking.

A B2B customer with a VAT number inside the EU. Magento zeroes the VAT, the module recognises the line as intra-community and books it on **EU No Tax**.

You changed a mapping after invoices were already booked. Existing bookings keep the rate they were booked under — the mapping is read when the invoice is queued, not afterwards. Correct those in Moneybird.

Need More Help?

Documentation:

- All Help Articles - Complete documentation overview

Support:

- Contact Support - Get help from our team

For a complete overview of features and configuration options, see the Moneybird Integration extension on magmodules.eu

All articles for Moneybird Integration

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1	Installation using Composer (recommended)
2	Installation using the Adobe Marketplace
3	Install through FTP and SSH

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1	Troubleshooting

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