



Tax Exemption Magento2 Extension





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Introduction to Tax Exemption

The Tax Exemption Magento2 extension is used to manage tax exemption certificates from customer account and provide tax free benefits for eligible customers. Customer can upload their tax exemption certificate from the "my account" section for approval. Once admin reviews and approves the request, customers can get the tax exempt option in checkout page. Admin can also set the expiration for the tax exemption from "customer account" section.

Version & Compatibility Support

Version:

1.0.0 Stable

Compatibility:

This extension is compatible from Magento Community 2.x and Magento Enterprise 2.x to the latest versions.

Features

- Administrator has full control over the customer tax exempt report.
- Enable/Disable the tax exemption at any time from Magento backend.
- Ability to set expiration date for the tax exemption.
- Once the tax exemption date expires, customer would not be able to get the tax exemption in checkout page. This can be controlled automatically.
- When the customer uploads the tax exemption certificate, it will be notified to the administrator via email.
- Once admin approves the tax exemption, the customer will get a notification via email.



- Admin can configure the email address which they need to receive all the tax exemption request email.

How to Install Tax Exemption?

Step 1: Download/purchase the extension.

Step2: Create a directory `app\code\DCKAP\Taxexemption` in your Magento Installation directory.

Step 3: Unzip the file in the above directory.

Step 4: Enter the following at the command line:

```
php bin/magento module:enable DCKAP_Taxexemption
```

Step 5: Enter the following at the command line:

```
php bin/magento setup:upgrade
```

Step 6: Login to Magento backend and navigate to Store -> Configuration -> DCKAP->Tax Exemption and configure the module.

Step 7: Clear the cache using the following command:

```
php bin/magento cache:clean
```

Module Configuration

To enable the extension, go to STORE > Configuration and from left side menu navigate to DCKAP->Tax Exemption.



General Configuration

Enabled [store view]	Yes
Request Email Receiver Name [store view]	DCKAP DEMO STORE
Request Email Receiver Email [store view]	mohann@dckap.com
Request Email Template to Admin [store view]	Request Mail Template to Adm
Approval Email Template to Customer [store view]	Approval Mail Template to Cu:

- Select Enabled to Yes for enabling the module.
- Request Email Receiver Name: Name of the person who needs to receive the Tax Exemption request from customer.
- Request Email Receiver Email: Email address for the admin who needs to receive the Tax Exemption request via email from the customer.
- Request Email Template to Admin: Email Template for the Tax Exemption request from customer.
- Approval Email Template to Customer: Email Template for the customer to receive the approval email from Admin.



Upload Tax Exemption Certificate

To upload a Tax Exemption certification, log into the website and go to my account section. Select Account Information tab and upload you tax exemption certificate.

Account Information

Address Book

My Sample Requests

My Orders

My Downloadable Products

My Credit Cards

First Name *

Last Name *

Tax Exempt Certificate

No file selected.

Once the customer uploads the tax exemption certificate, it will send an email to the admin to validate and approve the tax exempt certificate.

Manage Tax Exempt Certificate

To manage the tax exempt certificate, log into Magento backend and navigate to Customers->All Customers and edit the specific customer account. We can see the Tax Exempt certificate under Account Information tab.

Admin can view the tax exemption certificate and approve/decline the request. To approve the request set Expiry Date for the Tax Exemption and set Is Tax Exempt to Yes.



Tax Exempt Certificate

[Browse...](#)

No file selected.

Tax Exempt Certificate Link

[Click to View](#)

Tax Exempt Expiry Date

01/31/2017



Is Tax Exempt?



Yes

- Admin can change the Expiration date and Tax Exempt status any time.
- Admin can also upload the tax exempt certificate for the customer.

Upon approval, customer will receive email confirmation. Customers can also see their tax exempt status and expiration date in the My Account section.

Tax Exempt Certificate

[Browse...](#)

No file selected.

Tax Exempt Certificate Link

[Click to View](#)

Tax Exempt Expiry Date

30 January, 2018

Is Tax Exempt?

Yes



How to Exempt Tax on Checkout

In the checkout page, customers can get the option to apply the tax exempt. If the customer is eligible for the tax exemption, they can see the Tax Exemption option and should click the check box Do you want to include tax exemption?

Payment

Check / Money order

My billing and shipping address are the same

Mohan Natarajan
24940 Walnut Ave,
Fremont, California 94538
United States
5107962525

Place Order

Apply Discount Code

Tax Exemption


Do you want to include tax exemption?


Order Summary

Cart Subtotal	\$102.00
Shipping Flat Rate - Fixed	\$0.00
Tax	\$8.42
Tax Exempt Amount	-\$8.42

Order Total \$102.00

2 Items in Cart

 Geo Insulated Jogging Pant \$51.00
Qty: 1
[View Details](#)

 Geo Insulated Jogging Pant \$51.00
Qty: 1
[View Details](#)

Once the customer checks the box, it automatically detects the tax from the checkout page. Admin can also check the Tax Exempt amount in sales orders page.



Order Totals

Subtotal	\$102.00
Shipping & Handling	\$0.00
Tax	\$8.42
Tax Exempt Amount	-\$8.42
Grand Total	\$102.00
Total Paid	\$0.00
Total Refunded	\$0.00
Total Due	\$102.00

Admin can also apply tax exempt for the customer while placing order from Magento backend.



Tax Exemption

Do you want to include tax exemption?

Payment & Shipping Information

Payment Method

Check / Money order

Shipping Method

[Get shipping methods and rates](#)

Order Total

Order History

Order Comments

Order Totals

Subtotal	\$51.00
Shipping & Handling	\$0.00
Tax Exempt Amount	-\$4.21
Tax	\$4.21

Admin can simply click the Tax exempt option and it automatically apply the tax exempt for the customer.

Contact Information

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