

# VAT Exemption for Magento 2

## User Guide



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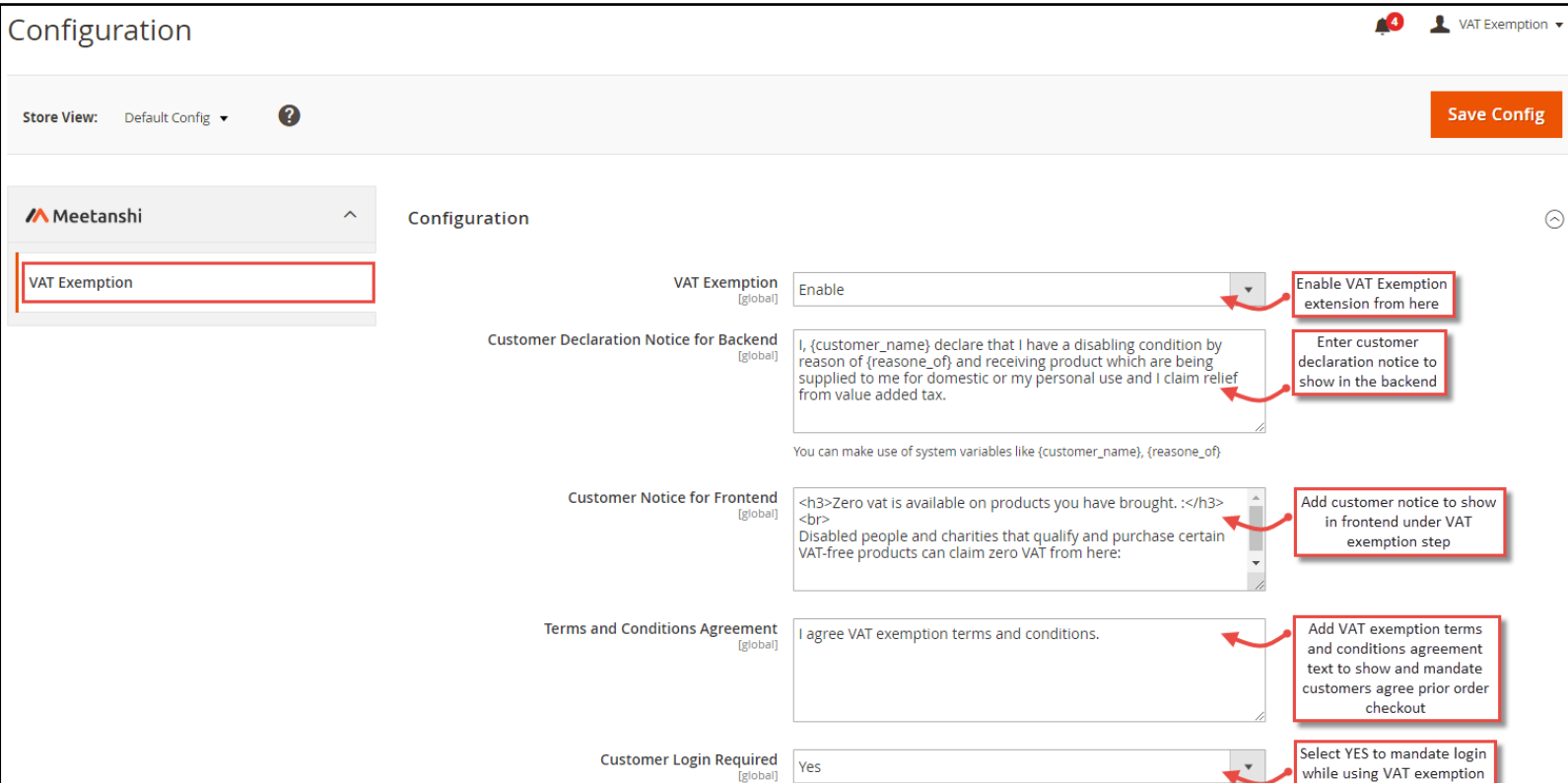
## 1. Extension Installation

- Create a folder structure in Magento root as app/code/Meetanshi/VatExempt
- Download and extract the zip folder and upload our extension files to the app/code/Meetanshi/VatExempt via FTP.
- Login to your SSH and run below commands step by step:
  - php bin/magento setup:upgrade
  - For Magento version 2.0.x to 2.1.x - php bin/magento setup:static-content:deploy
  - For Magento version 2.2.x & above - php bin/magento setup:static-content:deploy -f
  - php bin/magento cache:flush

## 2. Configuration

To configure the extension, login to Magento 2 backend, move to **Stores → Configuration → VAT Exemption** where you can find various settings to configure the extension.

- **VAT Exemption:** Enable the extension from here.
- **Customer Declaration Notice for Backend:** Enter customer declaration notice to show in the backend.
- **Customer Notice for Frontend:** Add customer notice to show in frontend under VAT exemption step.
- **Terms and Conditions Agreement:** Add VAT exemption terms and conditions agreement text to show and mandate customers agree prior order checkout.
- **Customer Login Required:** Set YES to mandate login for the customers using VAT exemption.



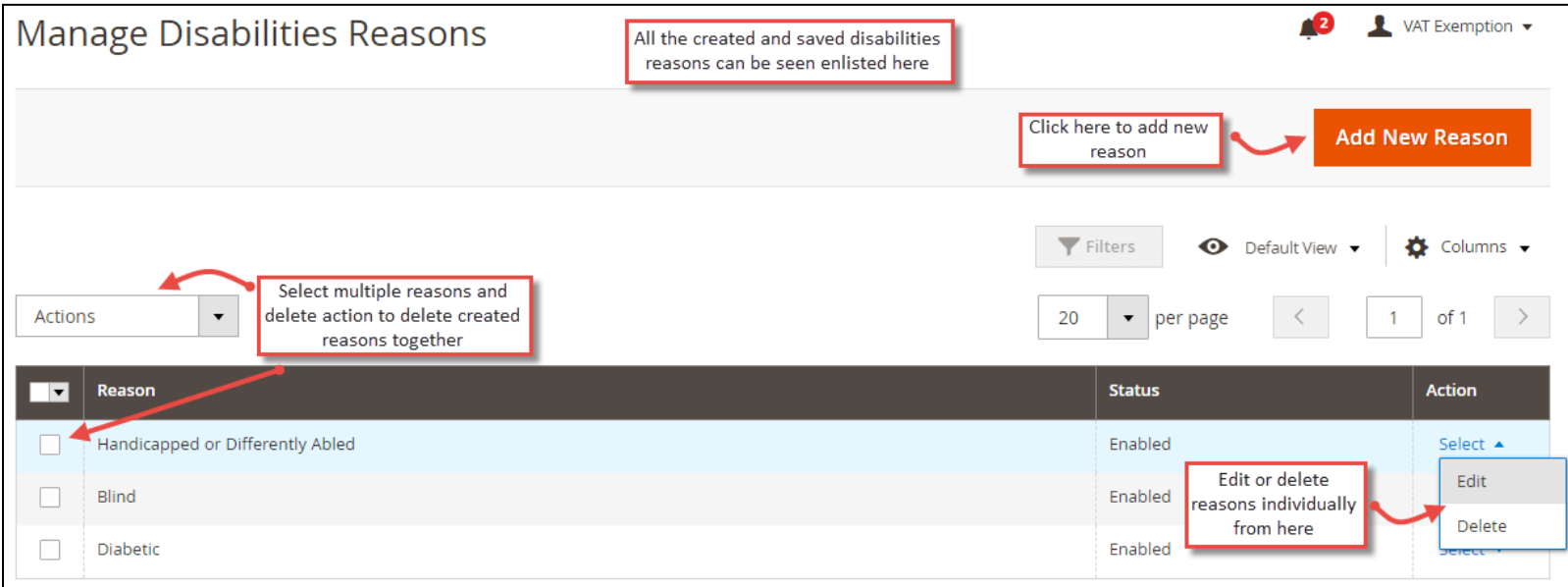
The screenshot shows the 'Configuration' page for the 'VAT Exemption' extension. The 'Store View' is set to 'Default Config'. A 'Save Config' button is visible in the top right. The 'VAT Exemption' section is expanded, showing the following settings:

- VAT Exemption [global]:** Set to 'Enable'. A red box highlights this dropdown with the instruction: 'Enable VAT Exemption extension from here'.
- Customer Declaration Notice for Backend [global]:** A text area containing the notice: 'I, {customer\_name} declare that I have a disabling condition by reason of {reason\_of} and receiving product which are being supplied to me for domestic or my personal use and I claim relief from value added tax.' A red box highlights this text with the instruction: 'Enter customer declaration notice to show in the backend'. Below the text area, it notes: 'You can make use of system variables like (customer\_name), (reason\_of)'.
- Customer Notice for Frontend [global]:** A text area containing the notice: '<h3>Zero vat is available on products you have brought. :</h3><br>Disabled people and charities that qualify and purchase certain VAT-free products can claim zero VAT from here:'. A red box highlights this text with the instruction: 'Add customer notice to show in frontend under VAT exemption step'.
- Terms and Conditions Agreement [global]:** A text area containing the text: 'I agree VAT exemption terms and conditions.'. A red box highlights this text with the instruction: 'Add VAT exemption terms and conditions agreement text to show and mandate customers agree prior order checkout'.
- Customer Login Required [global]:** Set to 'Yes'. A red box highlights this dropdown with the instruction: 'Select YES to mandate login while using VAT exemption'.

### 3. VAT Exemption Reasons

- **Manage Disabilities Reasons**

The module allows to create and manage reasons to be valid for VAT Exemption from the backend. Admin can delete one or multiple reasons at a time. As shown in the figure, click the button to add new reason.



Manage Disabilities Reasons

All the created and saved disabilities reasons can be seen enlisted here

Click here to add new reason

Add New Reason

Filters Default View Columns

20 per page 1 of 1

Reason	Status	Action
<input type="checkbox"/> Handicapped or Differently Able	Enabled	Select Edit Delete
<input type="checkbox"/> Blind	Enabled	Edit Delete
<input type="checkbox"/> Diabetic	Enabled	Select Edit Delete

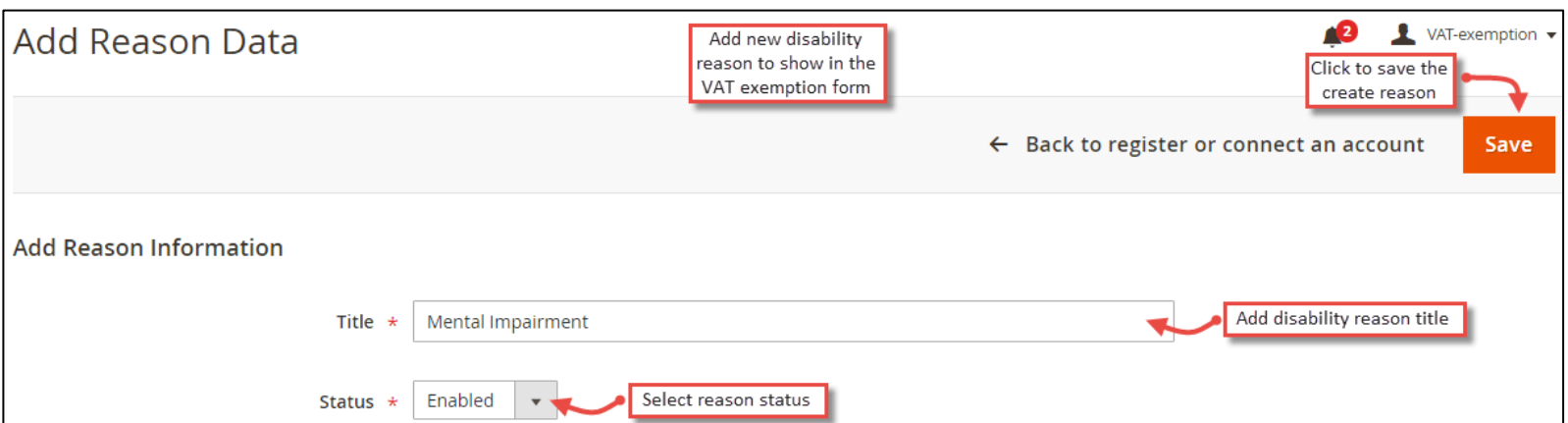
Select multiple reasons and delete action to delete created reasons together

Edit or delete reasons individually from here

- **Add New Reason**

Admin can add new disability reason for the VAT Exemption to be shown in the frontend VAT exemption form. Go to **VAT Exemption** → **Manage Disabilities Reasons** and click **Add New Reason** and set below configuration.

- **Title:** Add the disability reason title.
- **Status:** Select reason status



Add Reason Data

Add new disability reason to show in the VAT exemption form

Click to save the create reason

← Back to register or connect an account Save



Add Reason Information


Title \* Mental Impairment Add disability reason title

Status \* Enabled Select reason status

#### 4. Enable VAT Exemption for Products

To enable store products for the VAT exemption, go to **Catalog → Products** and select a product for which you want to enable VAT exemption. You will find a setting to enable VAT exemption for the product.

Wheelchair Enable VAT exemption for the product from Catalog > Products > Product Edit   VAT Exemption ▾

Store View: All Store Views ▾  [← Back to register or connect an account](#) [Add Attribute](#) [Save](#) ▾

**Enable Product** [website]  Yes

**Attribute Set**  ▾

**Product Name \*** [store view]

**SKU \*** [global]

**Price \*** [global]   
[Advanced Pricing](#)

**Tax Class** [website]  ▾



**Quantity** [global]   
[Advanced Inventory](#)

**Stock Status** [global]  ▾

**Weight** [global]  lbs  ▾

**Categories** [global]  ×  × ▾ [New Category](#)

**Visibility** [store view]  ▾

**Set Product as New From** [website]   To  

**Country of Manufacture** [website]  ▾


**Is Vat Exempt** [global]  Yes

## 5. VAT Exemption in Frontend

When the product is added to the cart, by default the tax without any exemption, is applied, as shown here.

# Shopping Cart

Tax applied on cart page

Item	Price	Qty	Subtotal
 Wheelchair	\$1,000.00	1	\$1,000.00

[Move to Wishlist](#)

[Update Shopping Cart](#)

### Summary

Estimate Shipping and Tax ▼

Subtotal \$1,000.00

Shipping (Flat Rate - Fixed) \$0.00

Tax \$190.00

**Order Total \$1,190.00**

Proceed to Checkout

Once the settings are configured properly, the VAT Exempt form is enabled in the frontend checkout. Whenever the customers add products to cart and move to checkout, VAT exemption steps enabled if the order includes VAT exempted products and if the customers claim for it. Here, customers have to fill up the form to claim VAT exemption. The form requests for the name and disability reason for application of VAT Exempt. User needs to agree with terms and conditions and then apply for the same. The below figure shows the VAT Exemption applied in the Cart page.

Shipping

Vat Exempt

Review & Payments

### Vat Exempt

**VAT Exempted Product(s)** List of VAT exempted products from your current order

Wheelchair

**Zero vat is available on products you have brought. :** VAT Exemption notice for customers

Disabled people and charities that qualify and purchase certain VAT-free products can claim zero VAT from here:

Please fill the form below:

Name of the VAT Exemption Applicant

Select Disability Reason

Handicapped or Differently Able

I agree VAT exemption terms and conditions. Terms and conditions agreement text

✔ Applied for VAT Exemption Successfully.

Apply or cancel VAT exemption from clicking the buttons

Apply VAT Exempt

Cancel VAT Exempt

### Order Summary

**Order Summary** VAT exempted from the order total

Cart Subtotal \$3,000.00

Shipping Flat Rate - Fixed \$0.00

**Order Total \$3,357.00**

1 Item in Cart ▼

**Ship To:** ✎

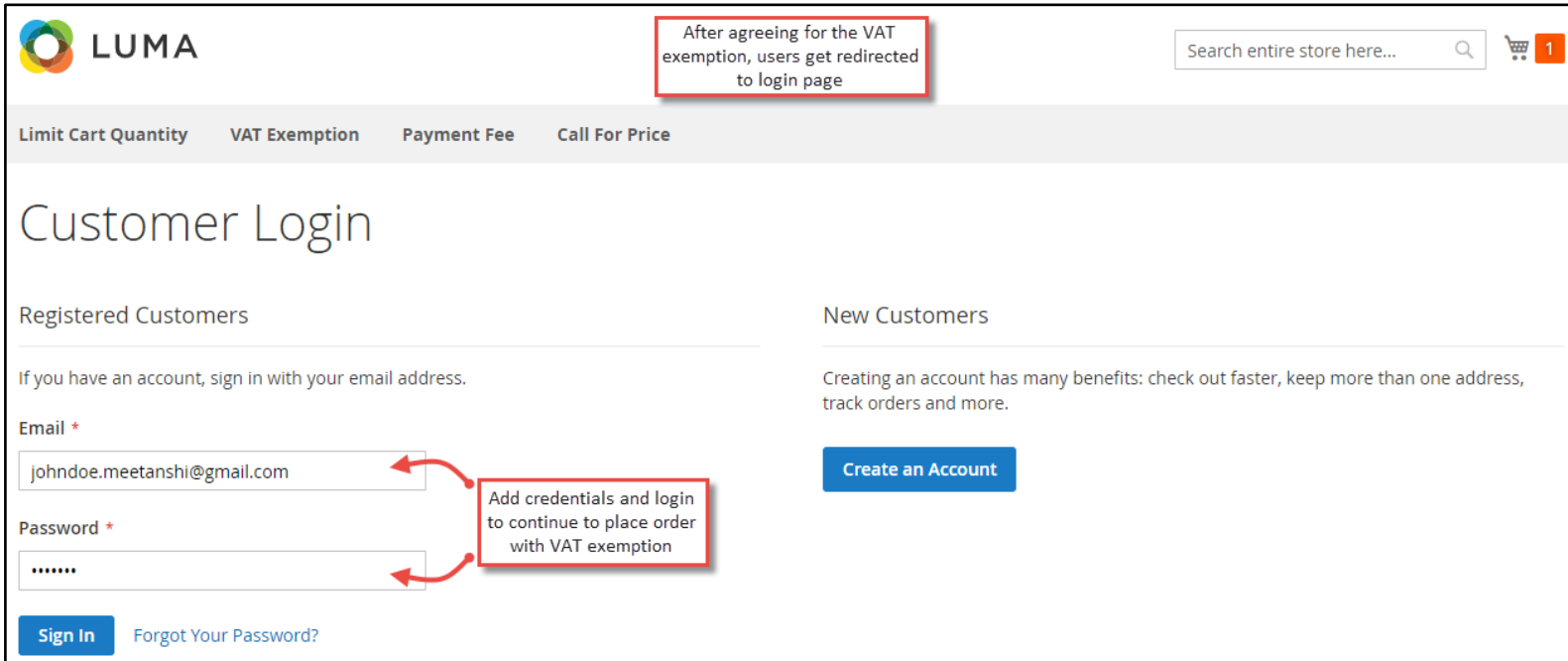
Veronica Costello  
 6146 Honey Bluff Parkway  
 Calder, acvcvc 49628  
 United Kingdom  
 5552293326

**Shipping Method:** ✎

Flat Rate - Fixed

Next

Once the users apply VAT exempt and click Next button, if they are not logged-in, they get redirected to login page if the login is set to mandatory from the backend.



The screenshot shows the LUMA Customer Login page. At the top left is the LUMA logo. To its right is a navigation menu with links: Limit Cart Quantity, VAT Exemption, Payment Fee, and Call For Price. Further right is a search bar with the text "Search entire store here..." and a shopping cart icon with a "1" item count. A red-bordered box with a white background contains the text: "After agreeing for the VAT exemption, users get redirected to login page". Below the navigation is the main heading "Customer Login". Underneath, there are two columns: "Registered Customers" and "New Customers". The "Registered Customers" section has the text "If you have an account, sign in with your email address." and two input fields: "Email \*" with the value "johndoe.meetanshi@gmail.com" and "Password \*" with masked characters ".....". A red-bordered box with a white background contains the text: "Add credentials and login to continue to place order with VAT exemption". Red arrows point from this box to both the email and password input fields. Below the password field is a "Sign In" button and a link "Forgot Your Password?". The "New Customers" section has the text "Creating an account has many benefits: check out faster, keep more than one address, track orders and more." and a "Create an Account" button.

## 6. VAT Exemption Declaration in Backend

The module supports a VAT Exemption declaration notice in order view from backend, as shown below. All the VAT exempted orders are shown with VAT exemption declaration in order view backend.

#000000003

VAT Exemption declaration notice in order view backend

← Back to register or connect an account
Cancel
Send Email
Hold
Invoice
Ship
Reorder
Edit

### Vat Exempt Declaration

I, **John Doe** declare that I have a disabling condition by reason of **Handicapped or Differently Aabled** and receiving product which are being supplied to me for domestic or my personal use and I claim relief from value added tax.

### Payment & Shipping Method

#### Payment Information

Cash On Delivery  
The order was placed using USD.

#### Shipping & Handling Information

**Flat Rate - Fixed \$5.00**

### Items Ordered

Product	Item Status	Original Price	Price	Qty	Subtotal	Tax Amount	Tax Percent	Discount Amount	Row Total
Wheelchair	Ordered	\$1,000.00	\$1,000.00	Ordered 1	\$1,000.00	\$0.00	0%	\$0.00	\$1,000.00
SKU: Wheelchair									

### Order Total

#### Notes for this Order

Status: Pending ▼

Comment:

Notify Customer by Email

Visible on Storefront

Submit Comment

#### Order Totals

Subtotal	\$1,000.00
Shipping & Handling	\$5.00
<b>Grand Total</b>	<b>\$1,005.00</b>
<b>Total Paid</b>	<b>\$0.00</b>
<b>Total Refunded</b>	<b>\$0.00</b>
<b>Total Due</b>	<b>\$1,005.00</b>