

Tax Exempt for Magento® 2

Version 1.4.1



USER GUIDE

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1. INTRODUCTION

1.1 Description:

Taxation is charged on Customer in many countries of European Union, UK, Malta, and Bahamas etc. Some of these countries offer TAX relief to a specific category of Citizen (Differently Able) on list of specific products.

Those specific products can be Health equipment's and equipment's essential for Differently Able people.

This module is basically a way out for not charging TAX for eligible customers. If your Web store is in one of the country where VAT is applicable and you want to exempt TAX for any of your product(s) and shipping then this will be a very helpful module for you.

1.2 Features:

At product level, there is an option in Backend on Product page to Enable/ Disable (Yes/No) TAX exemption. If enabled, the product will be classified as TAX exempted product and will be available for TAX exemption in both side frontend and backend. By default it will be disabled for all the products.

- Enable/Disable the tax exemption at any time in Back End
- A TAX Certificate will be displayed if there has at least one Tax exempted customer
- Support to API i.e. TAX details will be available in TAX level for TAX exempted Order.
- Compatible with Simple and Configurable products.
- Supports Special Price and Tier Price.
- Tested for Payment Methods – PayPal Express Checkout, Sage pay and Check/Money Order.
- Customer will get an option whether they want to opt for TAX exempt or Not.
- Support Special Price and Tier Price.

2. HOW TO SET UP

2.1 Steps to install TAX Exempt Extension for Magento® 2:

- 1) Take Backup of your Web directory and Store Database.
- 2) Download the TAX Exempt Extension from.

Upload contents of the TAX Exempt Module to your Store Root dictionary

The directory structure is as follows:

```
-- root directory
|-- app
    |--code
        |-- Oscprofessionals
        |-- Taxexempt
```

- 3) In SSH console of your server navigate to your store root folder: Cd <store folder path>
Example: cd /xxx/xxx/xxx/xxx/<Magento-Root>

- 4) Then run the following commands in the same sequence.

A. On Windows:

- i) php bin/magento module:enable Oscprofessionals_Taxexempt
- ii) php bin/magento setup:upgrade
- iii) php bin/magento setup:static-content:deploy -f
- iv) php bin/magento indexer:reindex

B. On Centos:

- i) bin/magento module:enable Oscprofessionals_TaxExempt
- ii) bin/magento setup:upgrade
- iii) bin/magento setup:static-content:deploy -f
- iv) bin/magento indexer:reindex

(Set 777 permission to var, pub and generated folders and sub-folders)

```
chmod 777 -R var/* pub/* generated/
```

- 5) Flush Store Cache. Log out from the back-end and log in again.

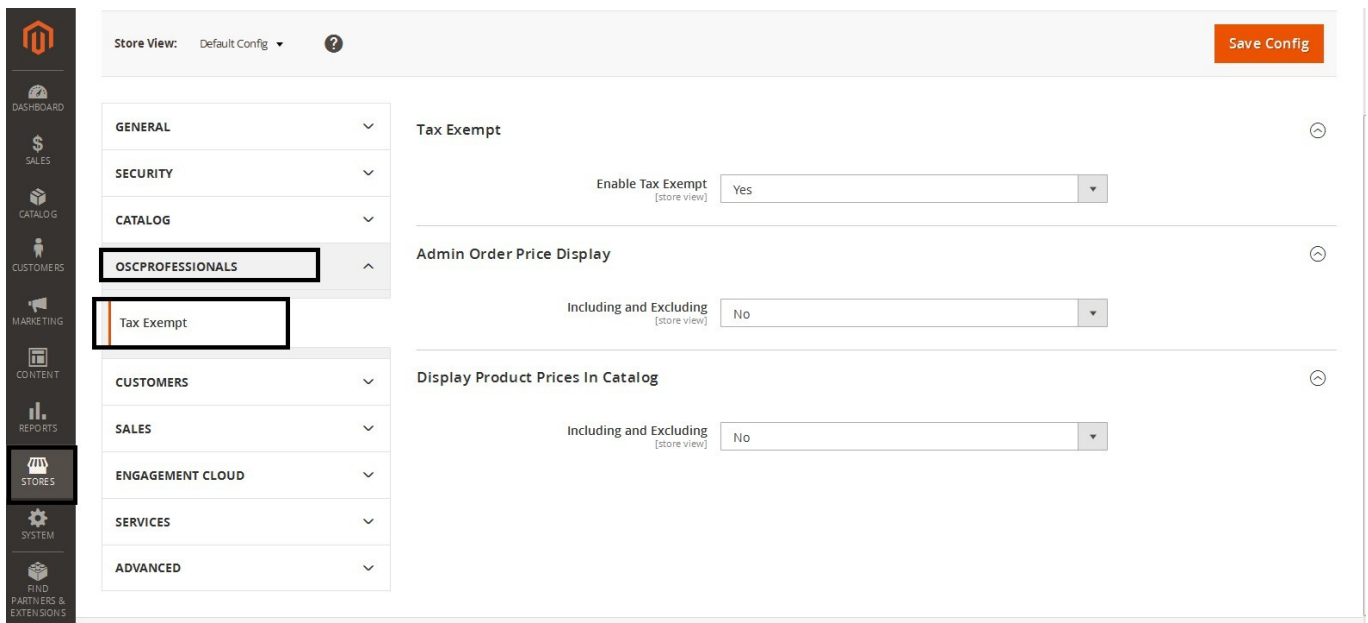
Tax Exempt extension for Magento® 2 is installed and ready to use.

3. HOW TO USE (Backend Setting)

3.1 Backend Configuration setting for TAX Exempt Extension:

Log in to the Backend and Enable Module:

Go to, **Backend**→**Stores**→**Configuration**→**Oscprofessionals**→**TAX Exempt**



From Configuration setting store-owner can enable/disable the module.

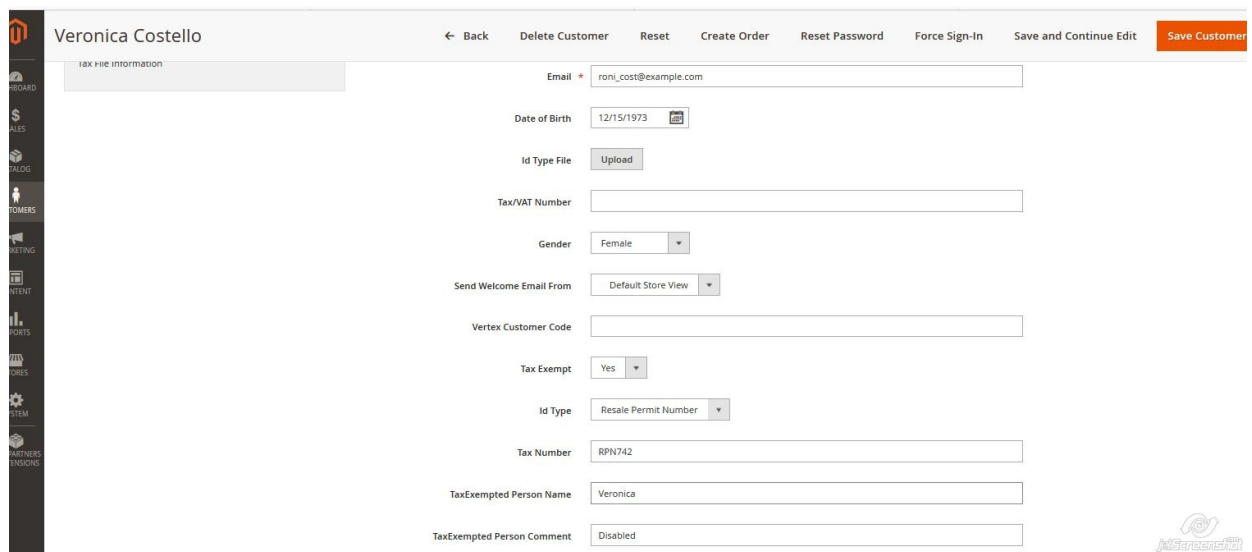
By using this extension store-owner can display Tax Exempt declaration form on “Checkout”.

3.1 Customer Tax Exempt Attribute

Set Customer Wise Tax Exempt attribute option and select 'Yes'

from drop down.

Go to, **Backend > Customer > All Customers > Add New Customer**




The screenshot shows a customer profile form for 'Veronica Costello'. The form includes various fields and a 'Save Customer' button. The 'Tax Exempt' field is a dropdown menu currently set to 'Yes'. Other fields include Email (roni_cost@example.com), Date of Birth (12/15/1973), Id Type File (Upload), Tax/VAT Number, Gender (Female), Send Welcome Email From (Default Store View), Vertex Customer Code, Id Type (Resale Permit Number), Tax Number (RPN742), TaxExempted Person Name (Veronica), and TaxExempted Person Comment (Disabled). A 'Save Customer' button is visible in the top right corner.

4. HOW TO USE (Front-end)

4.1 TAX Exemption for Guest Customer

If you enabled setting from configuration for **Enable Tax exempt “Yes”** then **Tax Exempt** tab will get display on the Checkout screen



Search entire store here...  



Shipping Address

Email Address *
 ?
You can create an account after checkout.

Order Summary
1 Item in Cart

First Name *

Last Name *

Select the tax type (Resale Number or IRS Number) from drop-down then enter the Tax Id value, once guest customer enter this details, Customer becomes eligible for tax exemption and customer will able to checkout without Tax.



Tax Exempt

Please fill the below details to exempt tax:

Name of person the goods are for

Their Condition

Tax Type

Tax ID

4.2 TAX Exemption for Existing Customer on Checkout:

For existing customer there will be only Name of Person and Their Condition get displayed on the screen

Welcome, Veronica Costello | Veronica Costello

LUMA

Search entire store here...

Shipping Tax Exempt Review & Payments

Tax Exempt

Please fill the below details to exempt tax:

Name of person the goods are for
Name of Tax Exempt Person

Their Condition
Comment

Apply Tax Exempt

Next

Order Summary

Cart Subtotal	\$45.00
Shipping Flat Rate - Fixed	\$5.00
Tax	\$3.71
Order Total	\$53.71

1 Item in Cart

Ship To:

Veronica Costello
6146 Honey Bluff Parkway
Calder, Michigan 49628-7978
United States
(555) 229-3326

The benefit of this feature to eligible customers, once existing customer enter this details, Customer becomes eligible for tax exemption and customer will able to checkout without Tax.

Welcome, Veronica Costello | Veronica Costello

LUMA

Search entire store here...

Shipping Tax Exempt Review & Payments

Tax Exempt

Please fill the below details to exempt tax:

Name of person the goods are for
Veronica

Their Condition
Test condition for tax exempt condition check.

Cancel Tax Exempt

Next

Order Summary

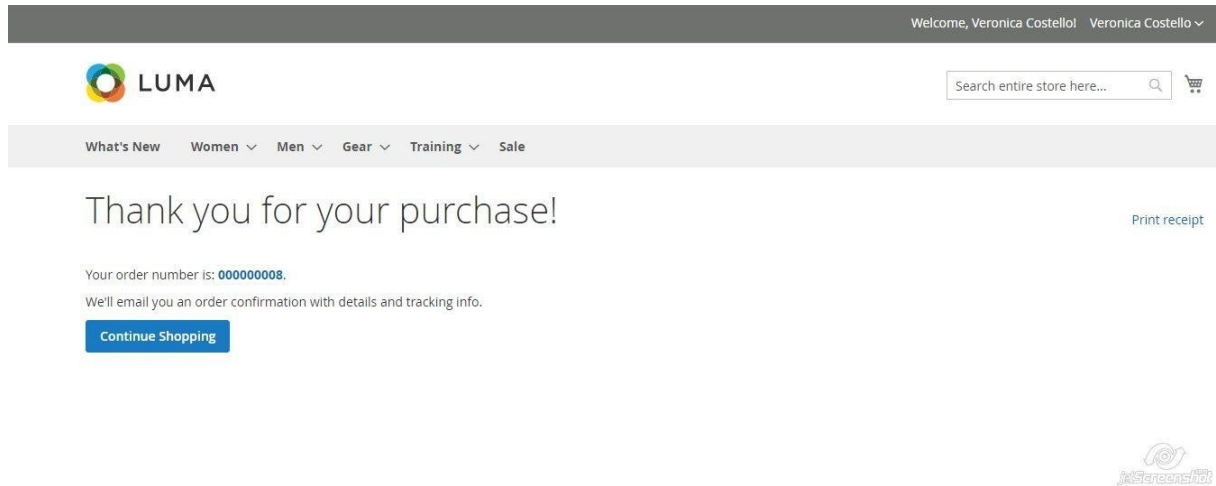
Cart Subtotal	\$45.00
Shipping Flat Rate - Fixed	\$5.00
Order Total	\$50.00

1 Item in Cart

Ship To:

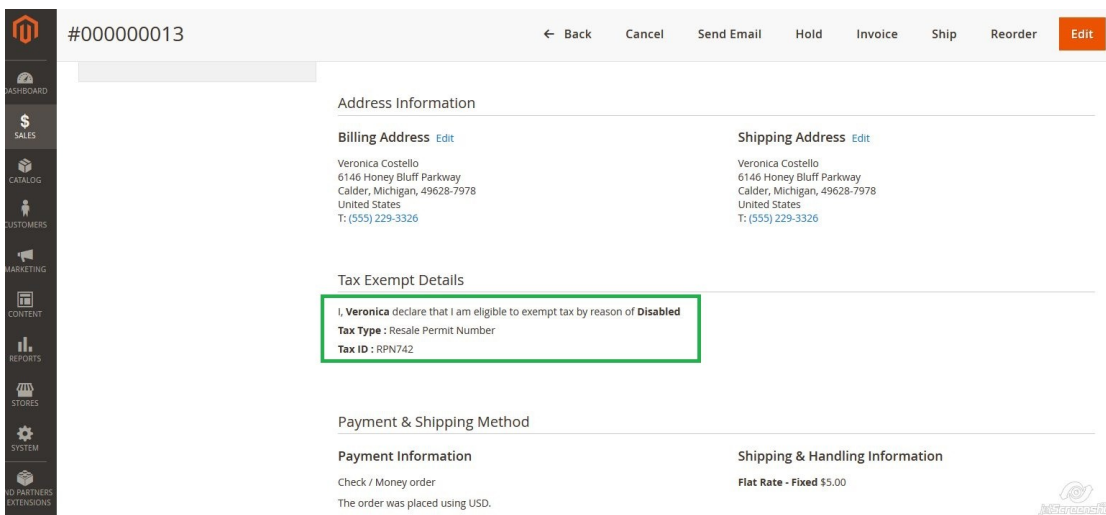
Veronica Costello
6146 Honey Bluff Parkway
Calder, Michigan 49628-7978
United States
(555) 229-3326

4.3 Place order from Front-end:



4.4 Order View from Backend for TAX Exempted product(s):

Store-owner can view the TAX exempt details on Order view page.



Thank you!