

# VAT Exempt For Magento® 2

*Version 1.3.4*



**USER GUIDE**



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## 1. INTRODUCTION

### 1.1 Description:

VAT (Value Added Tax) is charged on Products and Shipping in many countries of European Union, UK, Malta, Bahamas etc. Some of these countries offer VAT relief to a specific category of Citizen (Differently Abled) on list of specific products. Those specific products can be Health equipments and equipments essential for Differently Abled people.

This module is basically a way out for not charging VAT for eligible customers. If your Webstore is in one of the country where VAT is applicable and you want to exempt VAT 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) VAT exemption. If enabled, the product will be classified as VAT exempted product and will be available for VAT exemption in both side frontend and backend. By default it will be disabled for all the products.
- Enable/Disable Shipping Tax Exempt.
- A VAT declaration form will be displayed if cart has atleast one VAT exempted product.
- Support to API i.e. VAT details will be available in API level for VAT exempted Order.
- Compatible with Simple and Configurable products.
- Supports Special Price and Tier Price.
- Tested for Payment Methods – Paypal Express Checkout, Sagepay and Check/Money Order.
- Customer will get an option whether they want to opt for VAT exempt or Not.
- Supports Special Price and Tier Price.
- For reasons, administrator can assign 'sort number' to define position of a reason in drop down list.



## 2. HOW TO SET UP

### 2.1 Steps to install Vat Exempt Extension for Magento® 2:

- 1) Take Backup of your Web directory and Store Database.
  - 2) Download the Vat Exempt Extension from <http://www.oscprofessionals.com/magento-extension/vat-exempt-magento-2-module/>
  - 3) Upload contents of the VAT Exempt module to your store root directory.
  - 4) The directory structure is as follows:
    - root directory
    - |-- app
    - |--code
    - |-- Oscprofessionals
    - |--Vatexempt
  - 5) In SSH console of your server navigate to your store root folder:  
`cd <store folder path>`  
Example: `cd /xxx/xxx/xxx/xxx/<Magento-Root>`
  - 6) Then run the following commands in the same sequence.
    - A. On Windows:
      - i) `php bin/magento module:enable Oscprofessionals_Vatexempt`
      - 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_VatExempt`
      - 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/`
  - 7) Flush Store Cache. Log out from the back-end and log in again.  
Vat Exempt extension for Magento® 2 is installed and ready to use.
-

### 3. HOW TO USE (Backend Setting)

#### 3.1 Backend Configuration setting for VAT Exempt Extension:

Log in to the Backend and Enable Module:

Go to, **Backend-->Stores-->Configuration-->Oscprofessionals-->Vat Exempt**

Configuration

Store View: Default Config ? Save Config

**Vat Exempt**

Enable Vat Exempt [store view] Yes

**Vat Exempt Options**

Product Base [store view] Product Base

Assign Website [store view] Assign

Admin Order Price Display

Display Product Prices In Catalog

Display Vat Exempt Option On Shopping Cart

Display Vat Exempt [store view] Yes

Enable Shipping Tax Exempt

Enable [store view] Yes

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

By using this extension store-owner can also display VAT Exempt declaration form on “Shopping Cart page” and Enable setting for “Shipping Tax Exempt” for Vat Exempted Product(s).

### 3.2 Add and Manage VAT Exempt Reason List:

From Backend store-owner can manage different reasons for VAT Exemption.

To add/edit/delete VAT Exemption reason,

Go to, **Oscprofessionals--> Vatexempt reason-->Add New Row**

The screenshot displays the 'Add Row Data' form in the Magento Admin interface. The left sidebar shows the navigation menu with 'OSC PROFESSIONALS' highlighted. The main content area has a header with 'Add Row Data' and search, notification, and user icons. Below the header is a 'Back' button and a 'Save' button. The form fields are: 'Title \*' with the value 'Blind', 'Status \*' with a dropdown menu set to 'Enabled', and 'Sort Order' with the value '4'. A green callout box points to the 'Add New reason for Vat Exemption from here' button. Another green callout box points to the footer text: 'Vat Exempt Reason will display in frontend on checkout as per sort Order'. The footer also contains 'Copyright © 2018 Magento Commerce Inc. All rights reserved.' and 'Magento ver. 2.2.2 Report an Issue'.

### 3.3 Set Tax Rule:

After this extension installation, it's automatically create VAT Exempt tax rules. Assuming one default rule created by administrator for Product Vat.

**Tax Rules** Search 5 Person

[Add New Tax Rule](#)

**Search** [Reset Filter](#) 3 records found 20 per page 1 of 1

Name	Customer Tax Class	Product Tax Class	Tax Rate	Priority	Subtotal Only	Sort Order
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Rule1	Retail Customer	Taxable Goods	US-MI-*Rate 1	0	0	0
Vat Exempt	Retail Customer	Taxable Goods	Vat Exempt	0	0	0
UK Tax Rule	Retail Customer	Taxable Goods	UK Tax	0	0	0

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### 3.4 Product attribute for VAT Exemption:

Set Product attribute **VAT Exempt** option 'Yes' from drop down.

Go to, **Backend-->Catalog-->Products**

Wheelchair[VAT Relief]



Store View: All Store Views

Enable Product  Yes

Attribute Set: Chair

Product Name \* Wheelchair[VAT Relief]

SKU \* 24-MB02

Price \* \$ 59.00

[Advanced Pricing](#)

Tax Class Taxable Goods

Quantity 68

[Advanced Inventory](#)

Stock Status In Stock

Weight lbs This item has weight

Categories Vat Exempt [New Category](#)

If set 'Yes' then product will come under Vat Exempt Criteria

Visibility Catalog, Search

Vat Exempt Yes

Country of Manufacture





## 4. HOW TO USE (Front-end)

### 4.1 VAT Exempt declaration form on Shopping Cart:

If you enabled setting from configuration for “**Display Vat Exempt Option On Shopping Cart**” and if cart have Vat Exempted product(s) then Vat declaration form will be displayed on Shopping cart.

The screenshot displays the LUMA shopping cart interface. At the top, there is a navigation bar with the LUMA logo, a search bar, and a shopping cart icon with a '2' badge. Below the navigation bar, the page title 'Shopping Cart' is centered. The main content area is divided into two columns. The left column contains a table of items in the cart:

Item	Price	Qty	Subtotal
 Push It Messenger Bag	\$45.00	1	\$45.00
 Wheelchair[VAT Relief]	\$59.00	1	\$59.00

Each item row includes a 'Move to Wishlist' link and edit/delete icons. Below the table is an 'Update Shopping Cart' button. The right column contains a 'Summary' box with a dropdown for 'Estimate Shipping and Tax'. The summary shows: Subtotal (\$104.00), Shipping (Flat Rate - Fixed) (\$0.00), Tax (\$20.80), and Order Total (\$124.80). A 'Proceed to Checkout' button is present, along with a link for 'Check Out with Multiple Addresses'. Below the cart items, a 'Vat Exempt' section is displayed, highlighted by a green callout box with the text: 'Vat Exempt Declaration form will be displayed on shopping cart according to module configuration setting'. The VAT Exempt form includes the following text and fields:

Zero vat is available on products you have brought. :  
This is for disable people and charities that qualify and purchase certain Product VAT free to claim for zero VAT.  
Please fill the below details.  
If you do not wish to claim VAT then continue to checkout.

Please enter in the box below  
Name of person the goods are for  
  
Reason  
  
 I have read all the [terms and conditions](#)

The footer contains links for 'About us', 'Customer Service', 'Privacy and Cookie Policy', 'Search Terms', 'Advanced Search', and 'Contact Us', along with an email subscription field.

## 4.2 VAT Exempt declaration form on Checkout:

VAT Exempt step will be displayed on checkout, if there is atleast one vat exempted product in your cart.

By using 'vat declaration' form customers can claim for vat exemption if they are eligible for vat relief.

Welcome, Rony! Rony Costa ▾

2

✓  
Shipping

✓  
**Vat Exempt**

3  
Review & Payments

### Vat Exempt

Zero vat is available on products you have brought. :

This is for disable people and charities that qualify and purchase certain Product VAT free to claim for zero VAT. Please fill the below details.

If you do not wish to claim VAT then select next.

Please enter in the box below

Name of person the goods are for

Reason

I have read all the [terms and conditions](#)

### Order Summary

Cart Subtotal	\$104.00
Shipping	\$10.00
Flat Rate - Fixed	
Tax	\$11.00
<b>Order Total</b>	<b>\$125.00</b>

2 Items in Cart ^

Push It Messenger Bag

Qty: 1

\$45.00

Wheelchair[VAT Relief]

Qty: 1

\$59.00

### 4.3 Shipping Tax Exempt for VAT Exempted product:

In this extension we are providing feature to exempt shipping tax on purchase of Vat exempted product(s) for eligible customer.

Welcome, Rony! Rony Costa ▾

**LUMA** Search entire store here...

Shipping **Vat Exempt** Review & Payments

**Shipping Vat Exempt setting enabled from module configuration**

Vat Exempt

Zero vat is available on products you have brought. :

This is for disable people and charities that qualify and purchase certain Product VAT free to claim for zero VAT. Please fill the below details.

If you do not wish to claim VAT then select next.

Please enter in the box below

Name of person the goods are for  
Rony Costa

Reason  
Alzhiemers Disease

I have read all the [terms and conditions](#)

Cancel Vat Exempt

**Next**

**Order Summary**

Cart Subtotal	\$104.00
Shipping Flat Rate - Fixed	\$10.00
<b>Tax</b>	<b>\$10.00</b>
<b>Order Total</b>	<b>\$124.00</b>

Items in Cart

	Push It Messenger Bag Qty: 1	\$45.00
	Wheelchair[VAT Relief] Qty: 1	\$59.00

The benefit of this feature to eligible customers, they don't need to pay shipping taxes on purchase of Vat Exempted product.



## 4.4 Place order from Front-end:

Welcome, Rony! Rony Costa ▾

**LUMA**

Shipping ✓    Vat Exempt ✓    **Review & Payments** ✓

Payment Method:

- Check / Money order
- Cash On Delivery
  - My billing and shipping address are the same
    - Rony Costa
    - 21 Ploughley Rd
    - TOLLERTON, England G68 0JW
    - United Kingdom
    - 1111100000

**Place Order**

**Order Summary**

Cart Subtotal	\$104.00
Shipping Flat Rate - Fixed	\$10.00
Tax	\$10.00
<b>Order Total</b>	<b>\$124.00</b>

2 Items in Cart

	Push It Messenger Bag	\$45.00
	Qty: 1	
	Wheelchair[VAT Relief]	\$59.00
	Qty: 1	

**Vat Exempt Product**

## 4.5 Order View from Backend for VAT Exempted product(s):

Store-owner can view the Vat declaration details on Order view page.

- DASHBOARD
- OSCPROFESSIO NALS
- SALES
- CATALOG
- CUSTOMERS
- MARKETING
- CONTENT
- REPORTS
- STORES
- SYSTEM

#00000033
🔍 🔔 👤

← Back Cancel Send Email Hold Invoice Ship Reorder Edit

**ORDER VIEW**

- Information
- Invoices
- Credit Memos
- Shipments
- Comments History

**Order & Account Information**

**Order # 00000033 (The order confirmation email was sent)**

Order Date	Jul 5, 2018, 7:55:33 AM
Order Status	Pending
Purchased From	Main Website Main Website Store Default Store View

**Account Information**

Customer Name	Rony Costa
Email	rony@example.com
Customer Group	General

**Address Information**

<b>Billing Address</b> <a href="#">Edit</a>	<b>Shipping Address</b> <a href="#">Edit</a>
Rony Costa 21 Ploughley Rd TOLLERTON, England, G68 0JW United Kingdom T: 1111100000	Rony Costa 21 Ploughley Rd TOLLERTON, England, G68 0JW United Kingdom T: 1111100000

**Vat Exempt Declaration**

I, **Rony Costa** declare that I have a disabling condition by reason of **Alzheimers Disease** 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**

<b>Payment Information</b>	<b>Shipping &amp; Handling Information</b>
Cash On Delivery The order was placed using USD.	Flat Rate - Fixed \$10.00

**Items Ordered**

Product	Item Status	Original Price	Price	Qty	Subtotal	Tax Amount	Tax Percent	Discount Amount	Row Total
Push It Messenger Bag SKU: 24-WB04	Ordered	\$45.00	\$45.00	Ordered 1	\$45.00	\$9.00	20%	\$0.00	\$54.00
Wheelchair(VAT Relief) SKU: 24-MB02	Ordered	\$59.00	\$59.00	Ordered 1	\$59.00	\$0.00	0%	\$0.00	\$59.00

**Order Total**

<b>Notes for this Order</b>	<b>Order Totals</b>														
<p>Status: <span>Pending</span></p> <p>Comment: <input type="text"/></p> <p><input type="checkbox"/> Notify Customer by Email</p> <p><input type="checkbox"/> Visible on Storefront</p> <p><span style="background-color: #34495e; color: white; padding: 2px 5px;">Submit Comment</span></p>	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 80%;">Subtotal</td> <td style="text-align: right;">\$104.00</td> </tr> <tr> <td>Shipping &amp; Handling</td> <td style="text-align: right;">\$10.00</td> </tr> <tr> <td>Tax</td> <td style="text-align: right;">\$10.00</td> </tr> <tr> <td><b>Grand Total</b></td> <td style="text-align: right;"><b>\$124.00</b></td> </tr> <tr> <td><b>Total Paid</b></td> <td style="text-align: right;"><b>\$0.00</b></td> </tr> <tr> <td><b>Total Refunded</b></td> <td style="text-align: right;"><b>\$0.00</b></td> </tr> <tr> <td><b>Total Due</b></td> <td style="text-align: right;"><b>\$124.00</b></td> </tr> </table>	Subtotal	\$104.00	Shipping & Handling	\$10.00	Tax	\$10.00	<b>Grand Total</b>	<b>\$124.00</b>	<b>Total Paid</b>	<b>\$0.00</b>	<b>Total Refunded</b>	<b>\$0.00</b>	<b>Total Due</b>	<b>\$124.00</b>
Subtotal	\$104.00														
Shipping & Handling	\$10.00														
Tax	\$10.00														
<b>Grand Total</b>	<b>\$124.00</b>														
<b>Total Paid</b>	<b>\$0.00</b>														
<b>Total Refunded</b>	<b>\$0.00</b>														
<b>Total Due</b>	<b>\$124.00</b>														

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#### 4.6 VAT Exempt declaration information on Invoice, Shipment, Creditmemo and related PDF:

Store-owner can view the Vat declaration details on Invoice, Shipment, Creditmemo and related PDF. And keep record of vat declaration for future reference.

Invoice # 000000006 Order # 000000033 Order Date: Jul 5, 2018					
<b>Sold to:</b>	<b>Ship to:</b>				
Rony Costa 21 Ploughley Rd TOLLERTON, England, G68 0JW United Kingdom T: 1111100000	Rony Costa 21 Ploughley Rd TOLLERTON, England, G68 0JW United Kingdom T: 1111100000				
<b>Vat Exempt Details</b>					
I, Rony Costa declare that I have a disabling condition by reason of <b>Alzhiemers Disease</b> and receiving product which are being supplied to me for domestic or my personal use and I claim relief from value added tax.					
<div style="border: 2px solid green; border-radius: 15px; padding: 5px; display: inline-block;"><b>Vat exempt declaration information displaying on invoice pdf</b></div>					
<b>Payment Method</b>	<b>Shipping Method:</b>				
Cash On Delivery	Flat Rate - Fixed  (Total Shipping Charges \$10.00)				
<b>Products</b>	<b>SKU</b>	<b>Price</b>	<b>Qty</b>	<b>Tax</b>	<b>Subtotal</b>
Push It Messenger Bag	24-WB04	\$45.00	1	\$9.00	\$45.00
Wheelchair[VAT Relief]	24-MB02	\$59.00	1	\$0.00	\$59.00
				<b>Subtotal:</b>	<b>\$104.00</b>
				<b>Tax:</b>	<b>\$10.00</b>
				<b>Shipping &amp; Handling:</b>	<b>\$10.00</b>
				<b>Grand Total:</b>	<b>\$124.00</b>

## 4.7 Order Creation from Backend for VAT Exempt Product(s):

Store-owner can create order from backend for Vat Exempted products and apply zero vat on particular order for eligible customers.

The screenshot displays the 'Create New Order for Rony Costa in Default Store View' interface. The page is divided into several sections:

- Customer's Activities:** Includes Shopping Cart (2), Wish List (0), Last Ordered Items (1), Products in Comparison List (0), Recently Compared Products (0), and Recently Viewed Products (1).
- Items Ordered:** A table listing the items:

Product	Price	Qty	Subtotal	Discount	Row Subtotal	Action
Erika Running Short-32-Red SKU: WSH12-32-Red	\$45.00	1	\$45.00	\$0.00	\$45.00	Please select
Wheelchair[VAT Relief] SKU: 24-MB02	\$59.00	1	\$59.00	\$0.00	\$59.00	Please select
Total 2 products)			Subtotal:	\$104.00	\$0.00	\$104.00
- Account Information:** Includes Group (General) and Email (rony@example.com).
- Address Information:** Includes Billing Address and Shipping Address, both set to Rony Costa, 21 Ploughley Rd, TOLLERTON, England G68 0p.
- VatExempt Fields:** A section highlighted with a green border containing:
  - 1) Name of person the goods are for : Rony Costa
  - 2) Reason : Physically Handicapped
  - I have read all the terms and conditions
- Payment & Shipping Information:** Includes Payment Method (Cash On Delivery) and Shipping Method (Flat Rate - Fixed - \$10.00).
- Order Totals:** A summary table:

Item	Amount
Subtotal	\$104.00
Shipping & Handling (Flat Rate - Fixed)	\$10.00
Tax	\$10.00
<b>Grand Total</b>	<b>\$124.00</b>



# Thank you!

If you you have any **Queries** or **Feature Suggestions**, please contact us at:

<http://www.oscprofessionals.com/contact-us/>

Skype : [osc\\_support](#)

Email : [support@oscprofessionals.com](mailto:support@oscprofessionals.com)

Call Us : [+91-712-6648739](tel:+91-712-6648739)

**Your feedback is always welcome!**