

VAT Exempt Extension for Magento

Version 3.0.2



Magento Extension
USER GUIDE

Table of Contents

1 INTRODUCTION.....	
1.1 Introduction.....;	3
1.2 Features.....	3
2 HOW TO SETUP.....	
2.1 Process For Installing VAT Exempt Extension.....	4
3 HOW TO USE (Backend Setting).....	
3.1 Backend Configuration Setting for VAT Exempt Extension.....	5
3.2 Set Tax Rule for VAT Exemption.....	6
3.3 Product Attribute for VAT Exemption.....	9
4 HOW TO USE (Front-end).....	
4.1 VAT Exempt Declaration form on Checkout.....	10
4.2 Order View from Backend for VAT Exempted Product(s).....	11
4.3 Order Creation from Backend for VAT Exempt Product(s).....	12

1.1 INTRODUCTION:

VAT is Value Added Tax charged on Products and Shipping. But many countries offers VAT exemption to a specific category of citizens and some specific list of products which comes under Tax regimes. e.g. Medical equipments, Equipments for disable customers.

VAT(Value Added Tax) Exempt is very helpful for the store owners from countries which have VAT tax exemption eligibility. e.g. UK, Ireland, Malta, Bahamas etc.

1.2 Features:

- VAT Exemption flag is set at individual product level
- Admin order interface can also handle VAT Exemption
- Configuration setting for unit quantity limit and price limit for VAT Exempt Product
- VAT Exempt eligibility can be claimed as Guest or Registered users
- Supports different pricing like- Tier Price, Custom Price, Special Price
- Tested with Paypal and SagePay
- Supports Simple and Configurable products
- Support to catalog excluding tax price only
- Supports One Step Checkout (Amasty, IWD and OSCprofessionals modules)

2) HOW TO SET UP:

2.1 Process for Installing VAT Exempt Extension :

After Downloading the module, please unzip it.

Use Ftp client (such as filezilla, cuteFTP etc) to copy or upload all folder of unzipped file into your Magento® site root folder.

This will not overwrite any existing files, just add new files to the folder structure.

After uploading an extension, login to your Magento® administration panel and refresh cache.

Go to **System --> Cache Management**. Select all caches and take action “Refresh” then submit.

In your Magento® backend, please access, **System-->Configuration-->Advanced-->Advanced-->Oscprofessionals_Vat Exempt**

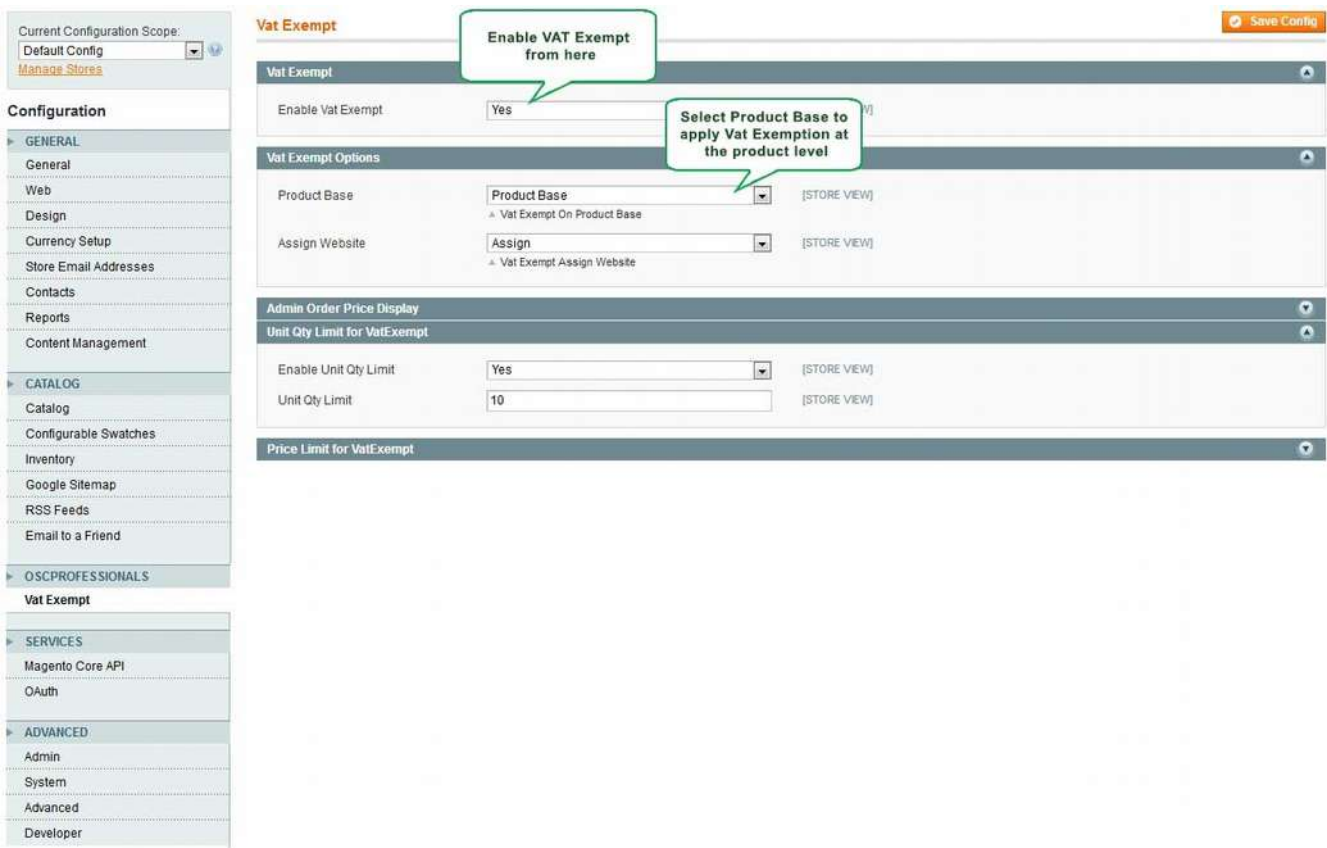
You can see the "**Oscprofessionals_Vat Exempt**" tab, if it is installed properly.

3) HOW TO USE (Backend Setting):

3.1 Backend Configuration setting for VAT Exempt Extension:

Log in to the Backend and Enable Module:

1. Enable Module from System->Configuration->Oscprofessionals->Vat Exempt



The screenshot displays the 'Vat Exempt' configuration page in the Magento Backend. The left sidebar shows the navigation menu with 'OSC PROFESSIONALS' > 'Vat Exempt' selected. The main content area is titled 'Vat Exempt' and includes a 'Save Config' button in the top right corner. The configuration is organized into several sections:

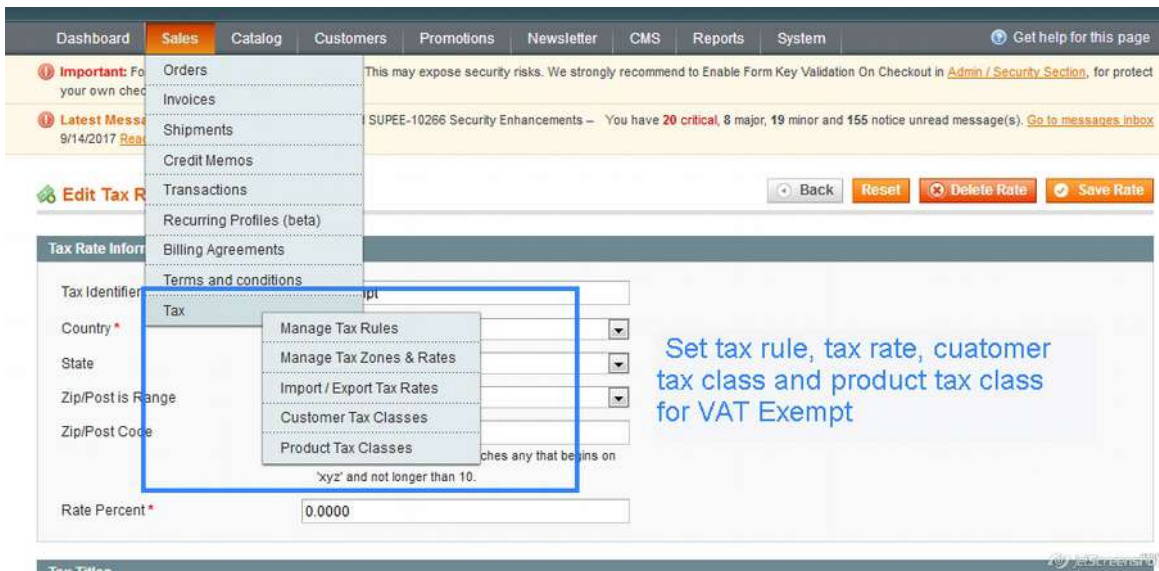
- Vat Exempt:** Contains the 'Enable Vat Exempt' setting, which is currently set to 'Yes'. A callout box points to this section with the text 'Enable VAT Exempt from here'.
- Vat Exempt Options:** Contains two settings:
 - 'Product Base': A dropdown menu set to 'Product Base'. A callout box points to this dropdown with the text 'Select Product Base to apply Vat Exemption at the product level'.
 - 'Assign Website': A dropdown menu set to 'Assign'.
- Admin Order Price Display:** Contains the 'Unit Qty Limit for VatExempt' setting, which is set to '10'.
- Price Limit for VatExempt:** This section is currently empty.

3.2 Set Tax Rule for VAT Exemption:

To create Tax rule go to the Admin->Sales->Tax->Tax Rules

Create New 'Customer Class' as 'Vat Exempt', Set product tax class as 'Vat Exempt'
Set tax rate for Vat Exempt with zero tax rate.

Create new rule for VAT Exempt and select 'Vat Exempt' in Customer Tax Class,
Product Tax Class and select VAT Exempt tax rate and save the tax rule.



The screenshot displays the 'Edit Tax Rule' page in the OSC Admin interface. The 'Sales' menu is active, and the 'Tax' dropdown is open, showing options like 'Manage Tax Rules', 'Manage Tax Zones & Rates', 'Import / Export Tax Rates', 'Customer Tax Classes', and 'Product Tax Classes'. The 'Rate Percent' field is set to 0.0000. A text box on the right provides instructions: 'Set tax rule, tax rate, customer tax class and product tax class for VAT Exempt'.

This is a demo store. Any orders placed through this store will not be honored or fulfilled.

Important: Formkey validation on checkout disabled. This may expose security risks. We strongly recommend to Enable Form Key Validation On Checkout in [Admin / Security Section](#), for protect your own checkout process.

Latest Message: Magento Open Source 1.9.3.6 and SUPEE-10266 Security Enhancements – You have **20 critical**, **8 major**, **19 minor** and **155 notice** unread message(s). [Go to messages inbox 9/14/2017](#) [Read details](#)

Edit Rule

[Back](#) [Reset](#) [Delete Rule](#) [Save Rule](#) [Save and Continue Edit](#)

Tax Rule Information

Name *	<input type="text" value="Vat Exempt"/>
Customer Tax Class *	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Retail Customer <input type="checkbox"/> Wholesale Customer <input type="checkbox"/> General <input type="checkbox"/> Members Only <input type="checkbox"/> Private Sales <input type="checkbox"/> Not Logged-in <input type="checkbox"/> Vat Exempt
Product Tax Class *	<ul style="list-style-type: none"> <input type="checkbox"/> Taxable Goods <input type="checkbox"/> Shipping <input type="checkbox"/> Tax Exempt <input checked="" type="checkbox"/> Vat Exempt
Tax Rate *	<ul style="list-style-type: none"> <input type="checkbox"/> US-MI-* -Rate 2 <input type="checkbox"/> US-NJ-* -Rate 1 <input type="checkbox"/> US-NJ-* -Rate 2 <input type="checkbox"/> US-NY-* -Rate 1 <input type="checkbox"/> US-NY-* -Rate 2 <input type="checkbox"/> US-OH-* -Rate 1 <input type="checkbox"/> US-OH-* -Rate 2 <input type="checkbox"/> US-TX-* -Rate 1 <input type="checkbox"/> US-TX-* -Rate 2 <input checked="" type="checkbox"/> vat_exempt
Priority *	<input type="text" value="1"/> <small>▲ Tax rates at the same priority are added, others are compounded.</small>
Calculate off subtotal only	<input type="checkbox"/>
Sort Order *	<input type="text" value="0"/>

Create new 'Tax Rate' for VAT Exempt and tax rate should be zero and assign it to vat exempt tax rule.

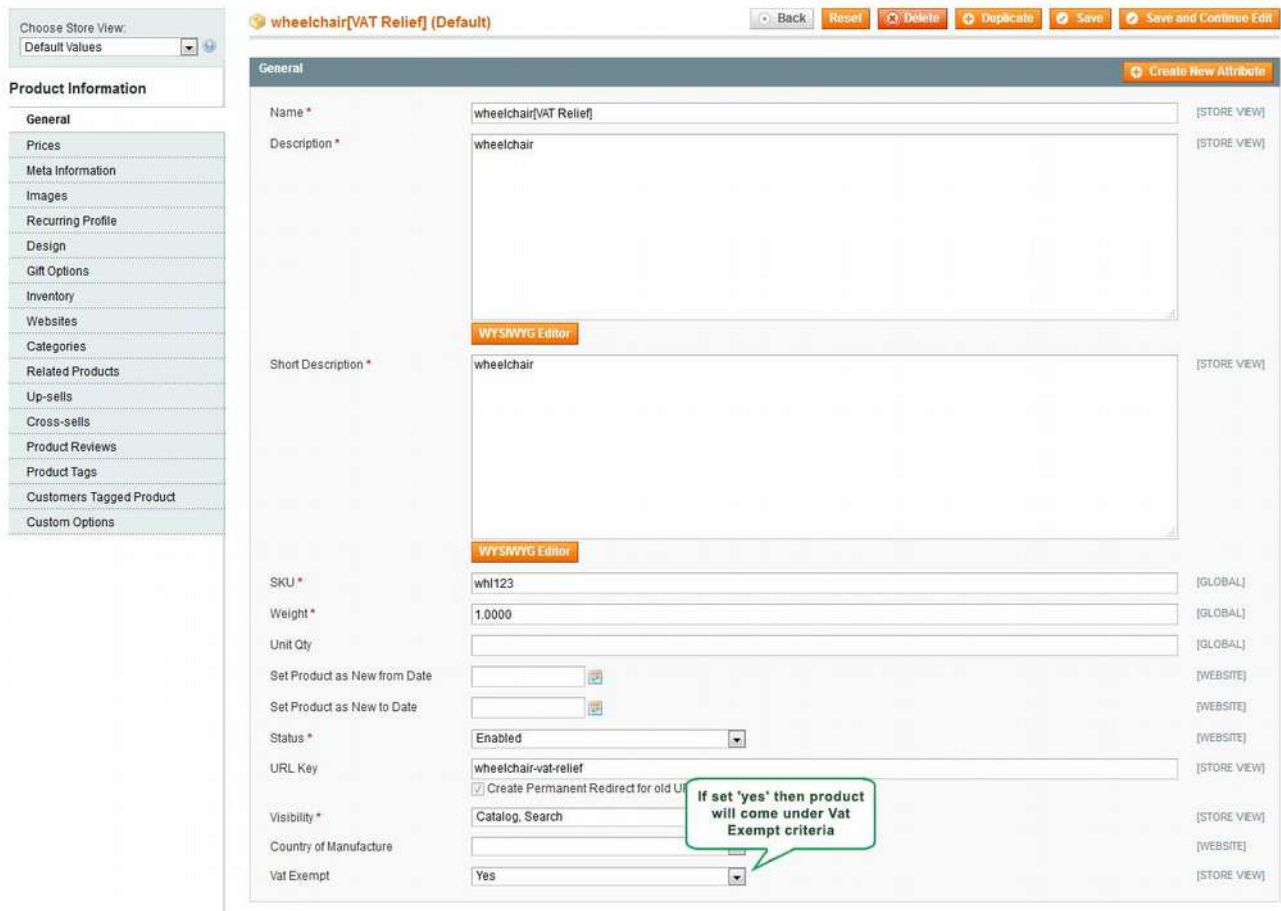
Tax Rate Information	
Tax Identifier *	<input type="text" value="vat_exempt"/>
Country *	<input type="text" value="United States"/>
State	<input type="text" value="*"/>
Zip/Post is Range	<input type="text" value="No"/>
Zip/Post Code	<input type="text" value="*"/>
	<small>▲ '*' - matches any; 'xyz*' - matches any that begins on 'xyz' and not longer than 10.</small>
Rate Percent *	<input type="text" value="0.0000"/>

Tax Titles		
English	French	German
<input type="text"/>	<input type="text"/>	<input type="text"/>
Note: Leave empty to use tax identifier		

3.3 Product Attribute for VAT Exemption:

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

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



Choose Store View:
Default Values

Product Information

- General
- Prices
- Meta Information
- Images
- Recurring Profile
- Design
- Gift Options
- Inventory
- Websites
- Categories
- Related Products
- Up-sells
- Cross-sells
- Product Reviews
- Product Tags
- Customers Tagged Product
- Custom Options

wheelchair[VAT Relief] (Default) [Back] [Reset] [Delete] [Duplicate] [Save] [Save and Continue Edit]

General [Create New Attribute]

Name * wheelchair[VAT Relief] [STORE VIEW]

Description * wheelchair [STORE VIEW]

Short Description * wheelchair [STORE VIEW]

SKU * wh1123 [GLOBAL]

Weight * 1.0000 [GLOBAL]

Unit Qty [GLOBAL]

Set Product as New from Date [WEBSITE]

Set Product as New to Date [WEBSITE]

Status * Enabled [WEBSITE]

URL Key wheelchair-vat-relief [STORE VIEW]

Create Permanent Redirect for old URL

Visibility * Catalog, Search [STORE VIEW]

Country of Manufacture [WEBSITE]

Vat Exempt Yes [STORE VIEW]

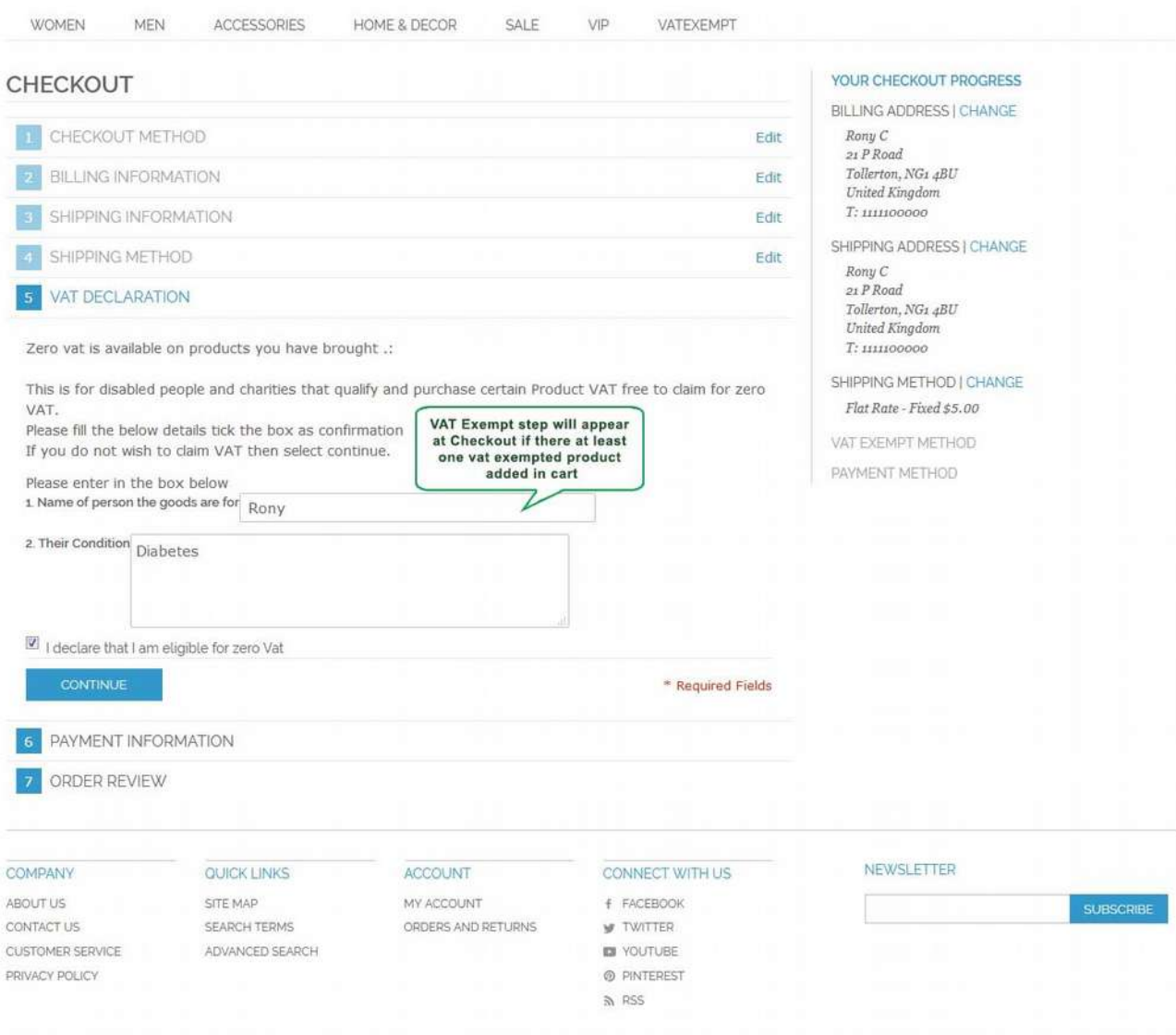
If set 'yes' then product will come under Vat Exempt criteria

4. HOW TO USE (Front-end):

4.1 VAT Exempt declaration form on Checkout:

VAT Exempt step will be displayed on checkout, if there is at-least 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.



WOMEN MEN ACCESSORIES HOME & DECOR SALE VIP VAT EXEMPT

CHECKOUT

- CHECKOUT METHOD [Edit](#)
- BILLING INFORMATION [Edit](#)
- SHIPPING INFORMATION [Edit](#)
- SHIPPING METHOD [Edit](#)
- VAT DECLARATION

[YOUR CHECKOUT PROGRESS](#)

[BILLING ADDRESS | CHANGE](#)
Rony C
21 P Road
Tollerton, NG1 4BU
United Kingdom
T: 1111100000

[SHIPPING ADDRESS | CHANGE](#)
Rony C
21 P Road
Tollerton, NG1 4BU
United Kingdom
T: 1111100000

[SHIPPING METHOD | CHANGE](#)
Flat Rate - Fixed \$5.00

[VAT EXEMPT METHOD](#)

[PAYMENT METHOD](#)

Zero vat is available on products you have brought .:

This is for disabled people and charities that qualify and purchase certain Product VAT free to claim for zero VAT.
Please fill the below details tick the box as confirmation
If you do not wish to claim VAT then select continue.

Please enter in the box below

1. Name of person the goods are for

2. Their Condition

I declare that I am eligible for zero Vat

[CONTINUE](#) * Required Fields

VAT Exempt step will appear at Checkout if there at least one vat exempted product added in cart

- PAYMENT INFORMATION
- ORDER REVIEW

COMPANY
ABOUT US
CONTACT US
CUSTOMER SERVICE
PRIVACY POLICY

QUICK LINKS
SITE MAP
SEARCH TERMS
ADVANCED SEARCH

ACCOUNT
MY ACCOUNT
ORDERS AND RETURNS

CONNECT WITH US
f FACEBOOK
t TWITTER
y YOUTUBE
p PINTEREST
RSS

NEWSLETTER
 [SUBSCRIBE](#)

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

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

Order View | Order # 145000020 | Mar 13, 2019 11:41:38 PM

Back Edit Cancel Send Email Hold Invoice Ship

Information

- Invoices
- Credit Memos
- Shipments
- Comments History
- Transactions

Order # 145000020 (the order confirmation email was sent)

Order Date: Mar 13, 2019 11:41:38 PM

Order Status: Pending

Purchased From: Main Website
Madison Island
English

Account Information

Customer Name: Rony C.

Email: demo@example.com

Customer Group: NOT LOGGED IN

Billing Address Edit

Rony C
21 P Road
Tollerton, NG1 4BU
United Kingdom
T: 1111100000

Shipping Address Edit

Rony C
21 P Road
Tollerton, NG1 4BU
United Kingdom
T: 1111100000

Vat Exempt Details

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

Payment Information

Cash On Delivery
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[VAT Relief] SKU: whl123	Ordered	\$100.00	Excl. Tax: \$100.00 Incl. Tax: \$100.00	Ordered: 1	Excl. Tax: \$100.00 Incl. Tax: \$100.00	\$0.00	0%	\$0.00	\$100.00

Comments History

Add Order Comments

Status: Pending

Comment:

Notify Customer by Email

Visible on Frontend

Mar 13, 2019 11:41:38 PM | Pending
Customer Notified ✓

Order Totals

Subtotal (Excl. Tax)	\$100.00
Subtotal (Incl. Tax)	\$100.00
Shipping & Handling (Excl. Tax)	\$5.00
Shipping & Handling (Incl. Tax)	\$5.00
Grand Total	\$105.00
Total Paid	\$0.00
Total Refunded	\$0.00
Total Due	\$105.00

4.3 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.

Create New Order for Customer Dev in English Cancel Submit Order

Order Currency: US Dollar

Customer's Current Activities

[Update Changes](#)

Shopping Cart (1)

Item	Qty	Price
Swiss Movement Sports Watch	1	\$500.00

[Clear Shopping Cart](#)

Wishlist (0)

No items

Last Ordered Items (1)

Item
Swiss Movement Sports Watch

Products in Comparison List (0)

No items

Recently Compared Products (0)

No items

Items Ordered [Add Products](#)

Product	Price	Qty	Subtotal	Discount	Row Subtotal	Action
wheelchair[VAT Relief] SKU: whl123 Vat Exempted Product Gift Options	Excl. Tax: \$100.00 Incl. Tax: \$100.00 <input type="checkbox"/> Custom Price*	1	Excl. Tax: \$100.00 Incl. Tax: \$100.00	\$0.00 <input checked="" type="checkbox"/> Apply	Excl. Tax: \$100.00 Incl. Tax: \$100.00	Configure
Total 1 product(s)			Subtotal: \$100.00	\$0.00	\$100.00	

* - Enter custom price excluding tax [Update Items and Qty's](#)

Apply Coupon Code

[Apply](#)

Account Information

Group *

Email

Payment Method

Cash On Delivery

Shipping Method

Flat Rate
Fixed - \$5.00
[Click to change shipping method](#)

Vatexempt Fields

I declare that I am eligible for zero Vat.

Order History

Order Comments

Order Totals

Subtotal (Excl. Tax)	\$100.00
Subtotal (Incl. Tax)	\$100.00
Shipping Excl. Tax (Flat Rate - Fixed)	\$5.00
Shipping Incl. Tax (Flat Rate - Fixed)	\$5.00
Grand Total	\$105.00

Append Comments

Email Order Confirmation

[Submit Order](#)

While creating an order from backend admin can use VAT Exempt feature

Note:

The provided VAT Module V 3.0.2 extends the below Magento core classes and events, so please check for dependencies or overrides with similar classes/events in other third party modules to avoid further conflicts resulting into non functioning of VAT module.

Magento Core Classes:

- Mage_Checkout_Model_Type_OnePage
- Mage_Tax_Model_Sales_Total_Quote_Subtotal
- Mage_Adminhtml_Model_Sales_Order_Create
- Mage_Checkout_Block_OnePage
- Mage_Adminhtml_Block_Sales_Order_Grid

Magento Events:

- sales_quote_address_collect_totals_before
- adminhtml_sales_order_create_process_data

Thank you!

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

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

Skype : **osc_support**

Email : **support@oscprofessionals.com**

Your feedback is always welcome!