

---

# Tax Exempt for Magento® 2

*Version 1.4.1*



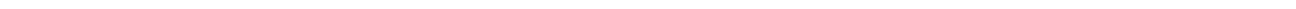
**USER GUIDE**

---

# Table of Content

---

<b>1 INTRODUCTION</b> .....	
1.1 Description.....	
1.2 Features.....	
<b>2 HOW TO SET UP</b> .....	
2.1 Steps to install TAX Exempt Extension for Magento 2.....	
<b>3 HOW TO USE (Backend Setting)</b> .....	
3.1 Backend Configuration setting for TAX Exempt Extension:.....	
3.2 Customer Tax Exempt .....	
<b>4 HOW TO USE (Front-End)</b> .....	
4.1 TAX Exemption for Guest Customer.....	
4.2 TAX Exemption for Existing Customer on Checkout.....	
4.3 Place order from Front-end.....	
4.4 Order View from Backend for TAX Exempted product(s).....	



---

## 1. INTRODUCTION

### 1.1 Description:

Our Tax Exempt module allows a customer to checkout without tax, provided they are exempted from Tax as per Government rules. A customer will have to submit his Tax ID type( Resale number or IRS number) and Tax Id Value plus attach his Tax Certificate while creating his account or by editing His account.

Admin interface also allows creating a customer with Tax exemption attributes. This module does not verify whether the details are correct, admin needs to check.

### 1.2 Features:

1. Tax Id and Tax Certificate can be added from My Account (Customer)
2. Customer can re-upload Tax Certificate
3. Allow Guest Customer to checkout tax free
4. Admin while creating a customer can add tax Type and tax Id value.
5. Admin can edit a customer detail for all fields related to Tax exemption and can enable or disable tax exempt flag.
6. For Guest Checkout, this module works by adding extra step that is 'Tax Exempt' in Checkout. 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. Here tax id and Tax type will be saved in order details.

---

## 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 <https://www.oscprofessionals.com/magento-extension/tax-exempt-magento-2-module/>
  - 3) Upload contents of the TAX Exempt Module to your Store Root dictionary
  - 4) The directory structure is as follows:
    - root directory
      - |-- app
        - |--code
          - |-- Oscprofessionals
          - |-- Taxexempt
  - 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\_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

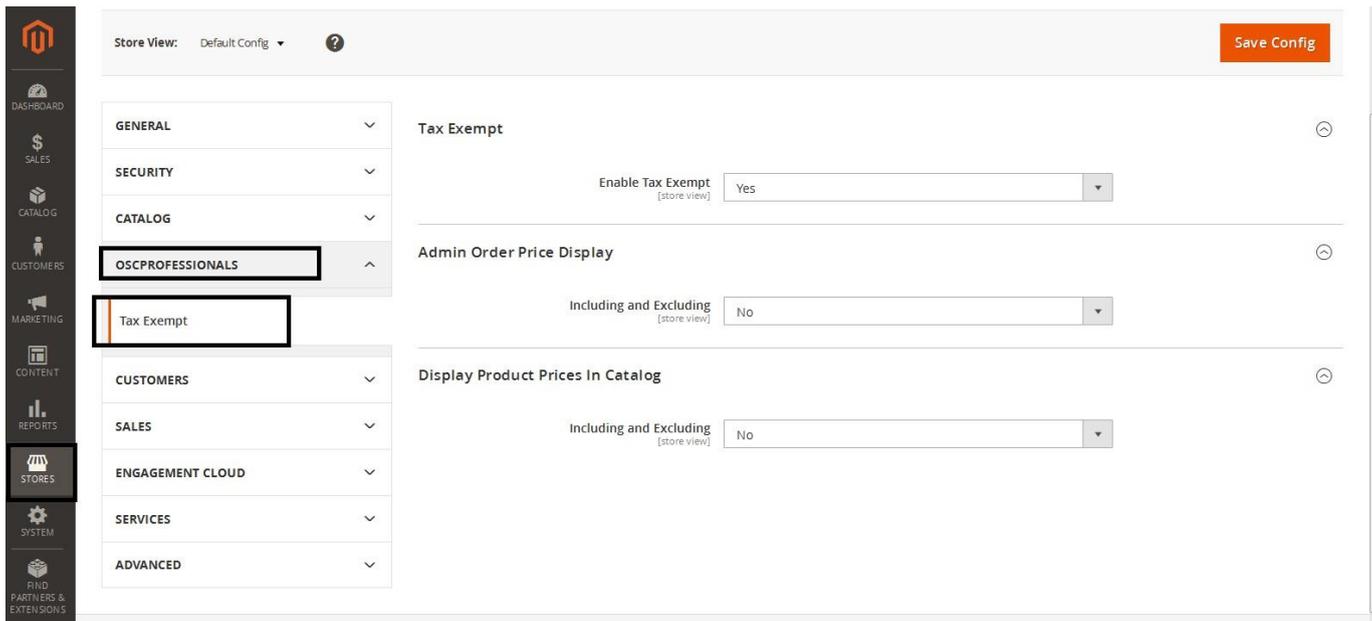
(Set 777 permission to var, pub and generated folders and sub-folders)  
chmod 777 -R var/\* pub/\* generated/
  - 7) Flush Store Cache. Log out from the back-end and log in again.
- Tax Exempt extension for Magento® 2 is installed and ready to use.

### 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**



The screenshot shows the Magento 2 Backend Configuration interface. On the left is a vertical sidebar with navigation icons and labels: DASHBOARD, SALES, CATALOG, CUSTOMERS, MARKETING, CONTENT, REPORTS, STORES, SYSTEM, and FIND PARTNERS & EXTENSIONS. The 'STORES' section is expanded, showing sub-categories: GENERAL, SECURITY, CATALOG, OSCPROFESSIONALS, Tax Exempt, CUSTOMERS, SALES, ENGAGEMENT CLOUD, SERVICES, and ADVANCED. The 'Tax Exempt' sub-category is selected and highlighted with a black box. The main content area shows the configuration for the 'Tax Exempt' module. At the top right, there is a 'Save Config' button. The configuration includes three sections, each with a collapse icon (⊖):

- Tax Exempt**: 'Enable Tax Exempt [store view]' is set to 'Yes'.
- Admin Order Price Display**: 'Including and Excluding [store view]' is set to 'No'.
- Display Product Prices In Catalog**: 'Including and Excluding [store view]' is set to 'No'.

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

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

### 3.2 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**

Veronica Costello

← Back Delete Customer Reset Create Order Reset Password Force Sign-In Save and Continue Edit **Save Customer**

Email \* roni\_cost@example.com

Date of Birth 12/15/1973

Tax Exempt Yes

Id Type Resale Permit Number

Id Type File Upload

Tax/VAT Number

Gender Female

Send Welcome Email From Default Store View

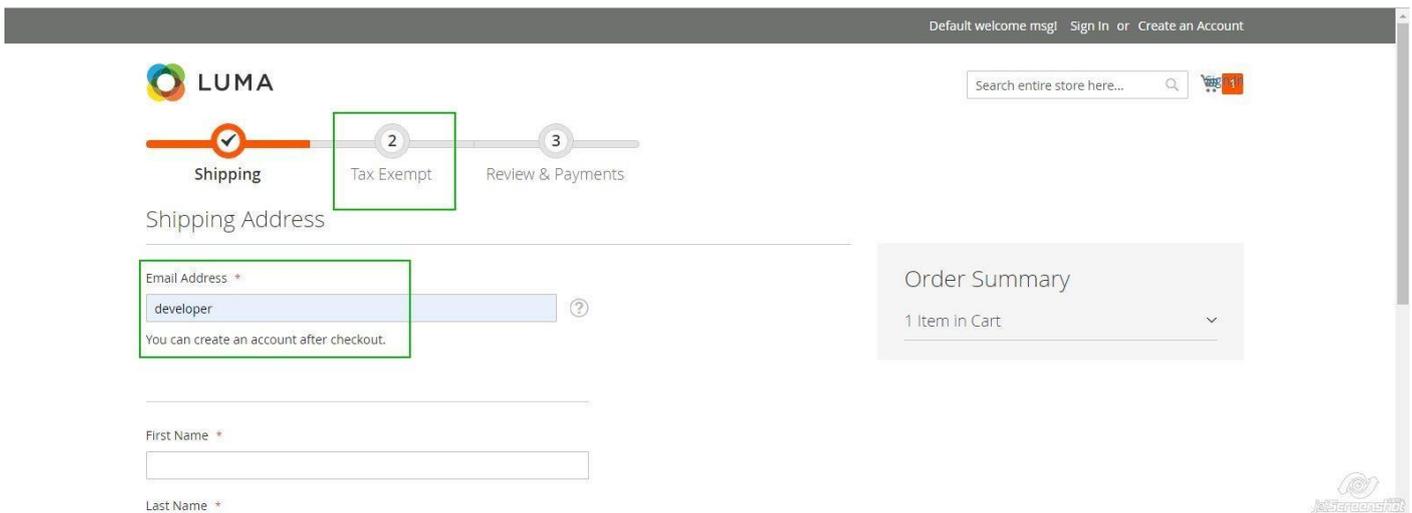
Vertex Customer Code



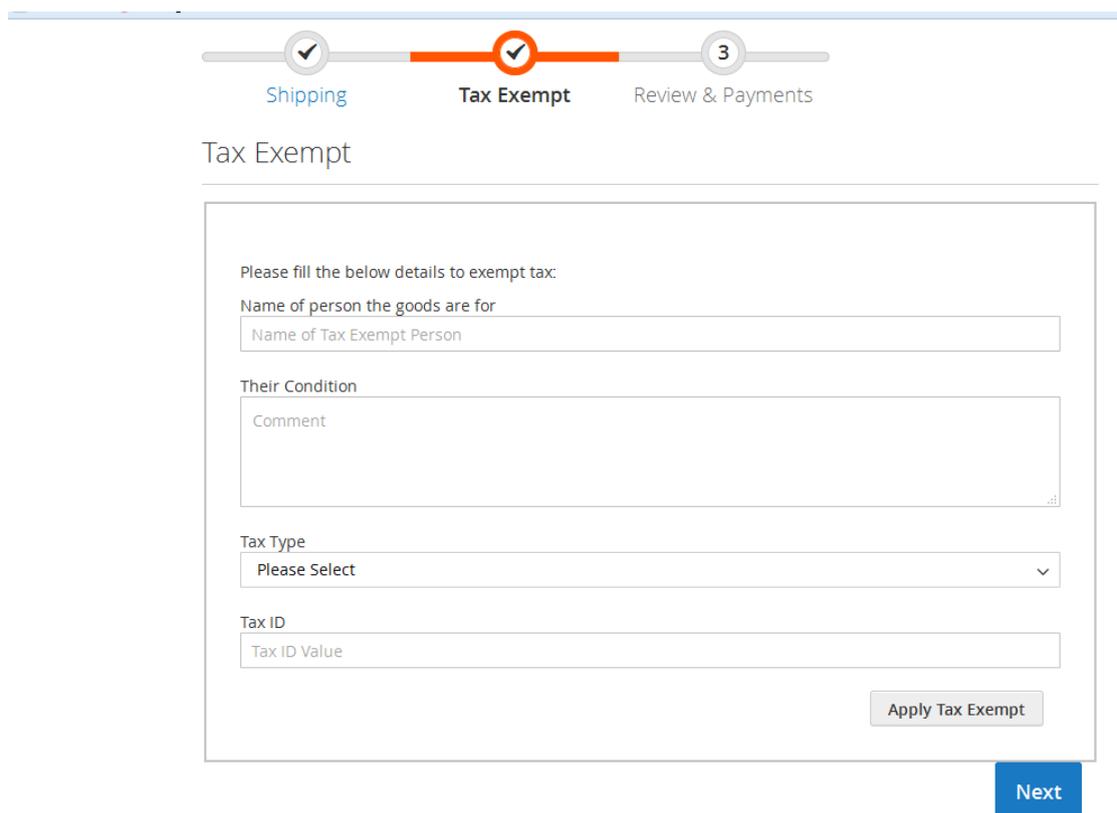
## 4. HOW TO USE (Front-end)

### 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



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.



## 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
<b>Order Total</b>	<b>\$53.71</b>

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
<b>Order Total</b>	<b>\$50.00</b>

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:

Welcome, Veronica Costello | Veronica Costello

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

Shipping  Tax Exempt  **Review & Payments**

#### Payment Method

Check / Money order

My billing and shipping address are the same

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

**Place Order**

Apply Discount Code

#### Order Summary

Cart Subtotal	\$45.00
Shipping Flat Rate - Fixed	\$5.00
<b>Order Total</b>	<b>\$50.00</b>

1 Item in Cart

Ship To:

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

Welcome, Veronica Costello | Veronica Costello

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

What's New Women Men Gear Training Sale

# Thank you for your purchase!

Your order number is: **00000008**.

We'll email you an order confirmation with details and tracking info.

**Continue Shopping**

[Print receipt](#)

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

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

#000000008← Back Send Email Credit Memo Hold Ship Reorder

Comments History

Placed from IP 192.168.0.254

### Address Information

<b>Billing Address</b> <a href="#">Edit</a>	<b>Shipping Address</b> <a href="#">Edit</a>
Veronica Costello 6146 Honey Bluff Parkway Calder, Michigan, 49628-7978 United States T: (555) 229-3326	Veronica Costello 6146 Honey Bluff Parkway Calder, Michigan, 49628-7978 United States T: (555) 229-3326

### Tax Exempt Details

I, **Veronica** declare that I am eligible to exempt tax by reason of **Veronica**

### Payment & Shipping Method

<b>Payment Information</b>	<b>Shipping &amp; Handling Information</b>
Check / Money order The order was placed using USD.	<b>Flat Rate - Fixed</b> \$5.00



# 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](mailto:support@oscprofessionals.com)**

**Call Us :** +91-712-6648739