



## Enabling and disabling tax collection for a customer

Syeda Khadija Phool - 2023-11-10 - Managing Customers

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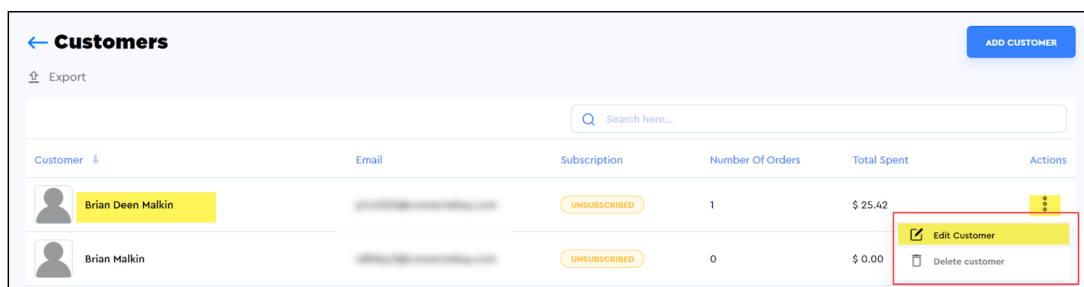
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If you are delivering the products in a region where you are not collecting taxes but want to collect a tax from a specific customer only, then you can explicitly enable tax collection for that customer from the **Cartzy admin panel**. Similarly, you can also exempt a particular customer from tax collection.

**Path: Customers > Customer record > Edit Customer**

## Enabling tax collection

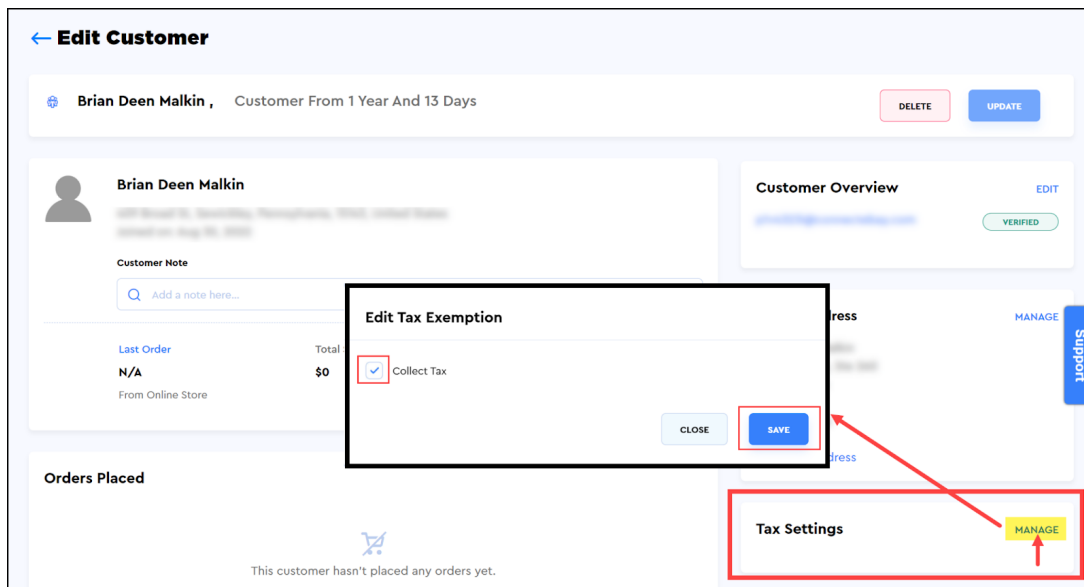
1. On the **Customers** page, open the customer in **edit mode**. To do so, click the **kebab menu icon** > select **Edit Customer**.



The screenshot shows the 'Customers' page in the Cartzy admin panel. It features a table with columns: Customer, Email, Subscription, Number Of Orders, Total Spent, and Actions. Two customers are listed: Brian Deen Malkin and Brian Malkin. The 'Actions' column for Brian Malkin is highlighted with a red box, showing options to 'Edit Customer' (checked) and 'Delete customer'.

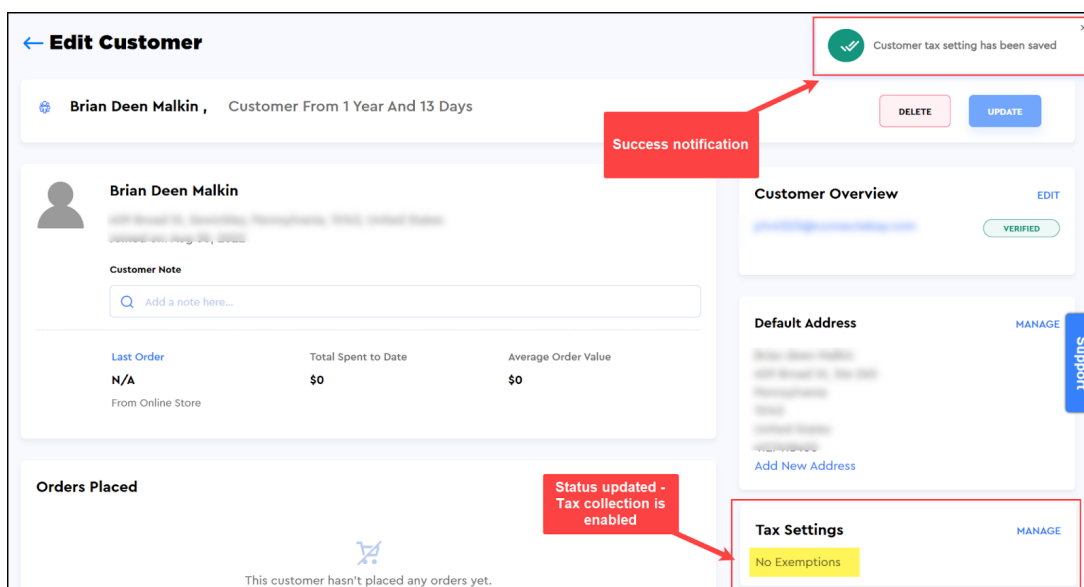
Customer	Email	Subscription	Number Of Orders	Total Spent	Actions
Brian Deen Malkin		UNSUBSCRIBED	1	\$ 25.42	
Brian Malkin		UNSUBSCRIBED	0	\$ 0.00	<input checked="" type="checkbox"/> Edit Customer <input type="checkbox"/> Delete customer

2. On the **Edit Customer** page, go to the **Tax Settings**, and click **Manage**. The **Edit Tax Exemption** popup will appear. **Checkmark** the **Collect Tax** checkbox, and click **Save**.



3. As soon as you click on the **Save** button on the **Edit Tax Exemption** popup window, the following will occur:

- The tax collection setting for that customer will be updated.
- A **notification** of success will appear at the top right corner of the page.
- In the **Tax Settings** section on the right side of the page, the label “**No Exemptions**” will appear.



## Disabling tax collection

To exempt a specific customer from taxes, repeat the same steps as mentioned above except that this time you will **uncheck** the **Collect Tax** checkbox.

### Edit Tax Exemption

☒ Collect Tax

CLOSE
SAVE

### Edit Tax Exemption

☐ Collect Tax

CLOSE
SAVE

After **unchecking** the **Collect Tax** checkbox on the **Edit Tax Exemptions** popup, and clicking the **Save** button, the following will occur:

- The tax collection setting for that customer will be updated.
- A **notification** of success will appear at the top right corner of the page.
- In the **Tax Settings** section on the right side of the page, the label “**No Exemptions**” will disappear.

Edit Customer

Brian Deen Malkin

Customer From 1 Year And 13 Days

DELETE
UPDATE

Brian Deen Malkin

1000 Main St, Seattle, WA 98101, United States

Joined on Aug 10, 2020

Customer Note

Add a note here...

Last Order

Total Spent to Date

Average Order Value

N/A

\$0

\$0

From Online Store

Customer Overview

EDIT

VERIFIED

Default Address

MANAGE

Add New Address

Tax Settings

MANAGE

Orders Placed

This customer hasn't placed any orders yet.

Tax collection is disabled





## Timeline updates

The **Timeline** section on the customer page shows the history of the customer record i.e., any changes made to the record are added to the timeline.

In the case of editing **tax emotion settings**, you can see that the actions of enabling and disabling tax collection are recorded and listed in the timeline.

Timeline

☒ Show comments

POST

added exempt from all taxes from this customer.

12 SEP, 2023 11:09 PM

removed exempt from all taxes from this customer.

12 SEP, 2023 10:59 PM