



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.

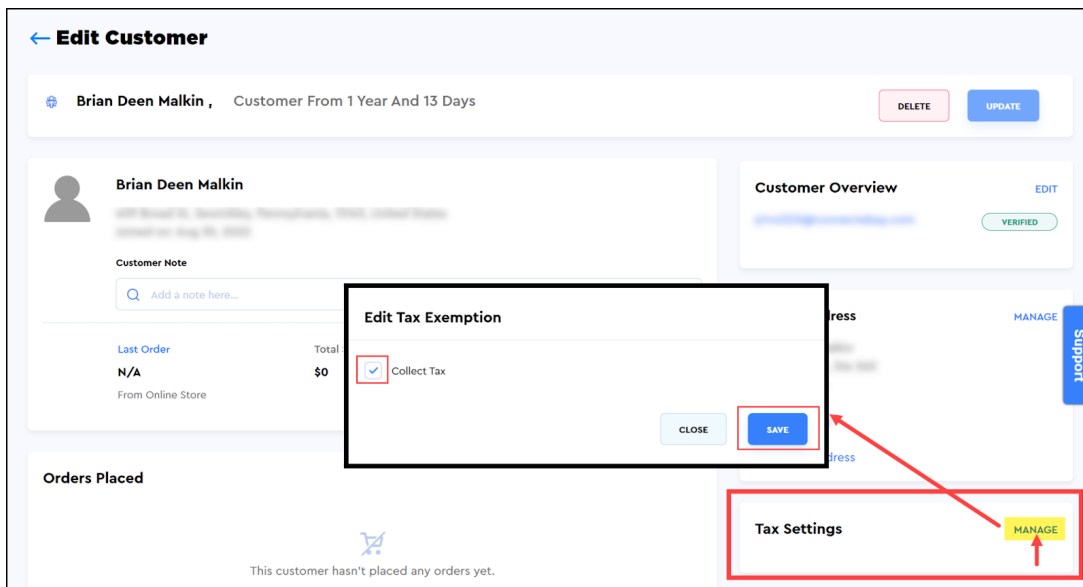
Path: Customers > Customer record > Edit Customer

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**.

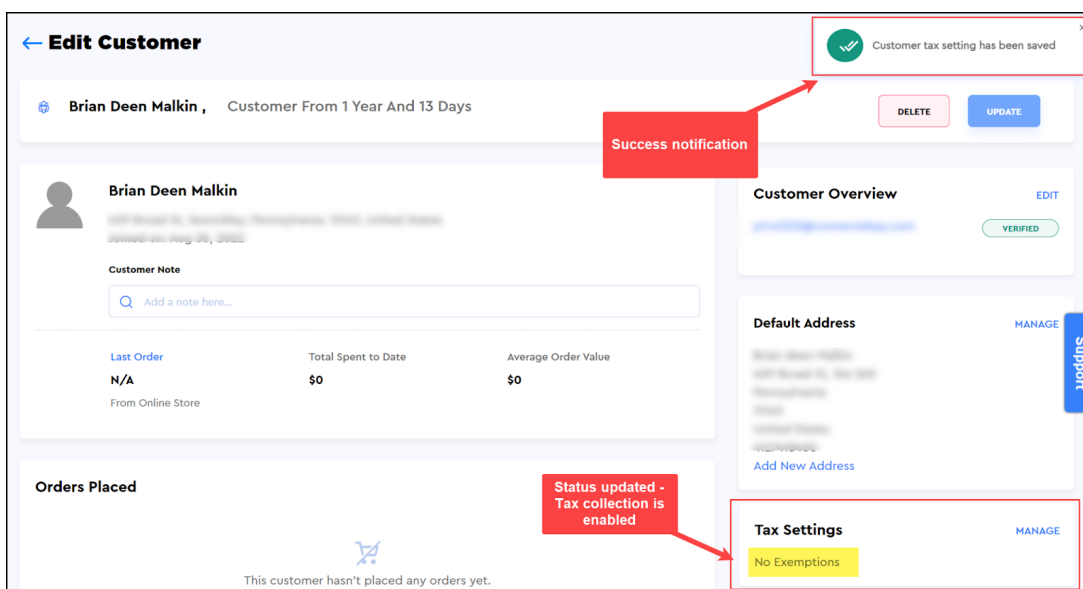
Customer	Email	Subscription	Number Of Orders	Total Spent	Actions
Brian Deen Malkin		UNSUBSCRIBED	1	\$ 25.42	 Edit Customer Delete customer
Brian Malkin		UNSUBSCRIBED	0	\$ 0.00	 Delete customer

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**.



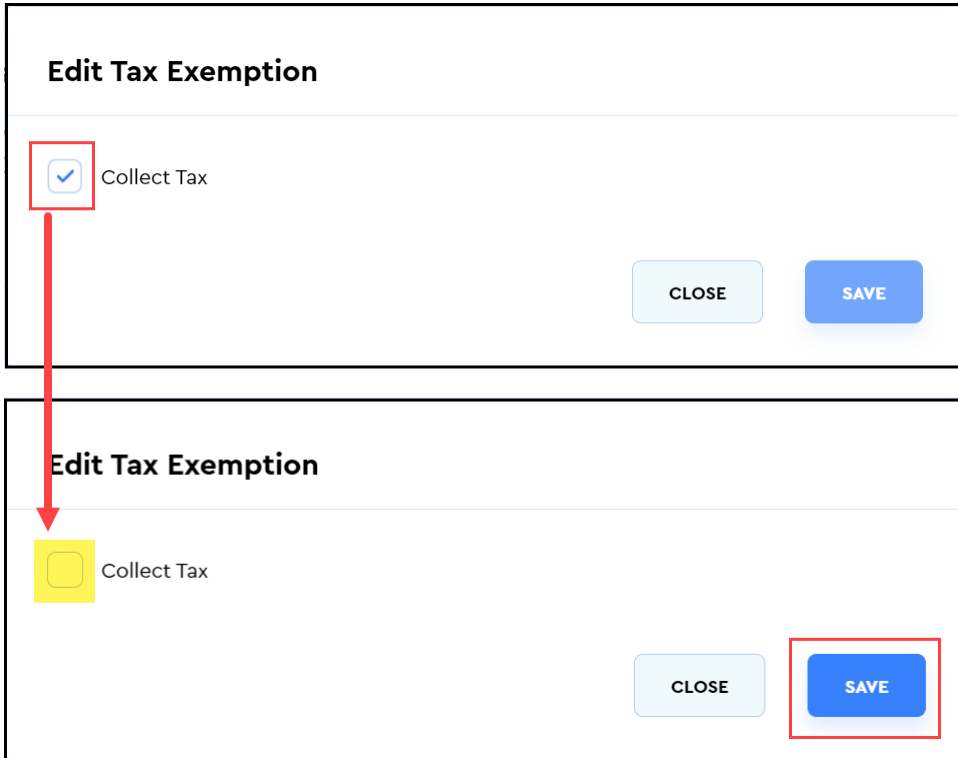
3. As soon as you click on the **Save** button on the **Edit Tax Exemption** popup window, the following will occur:

- 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.



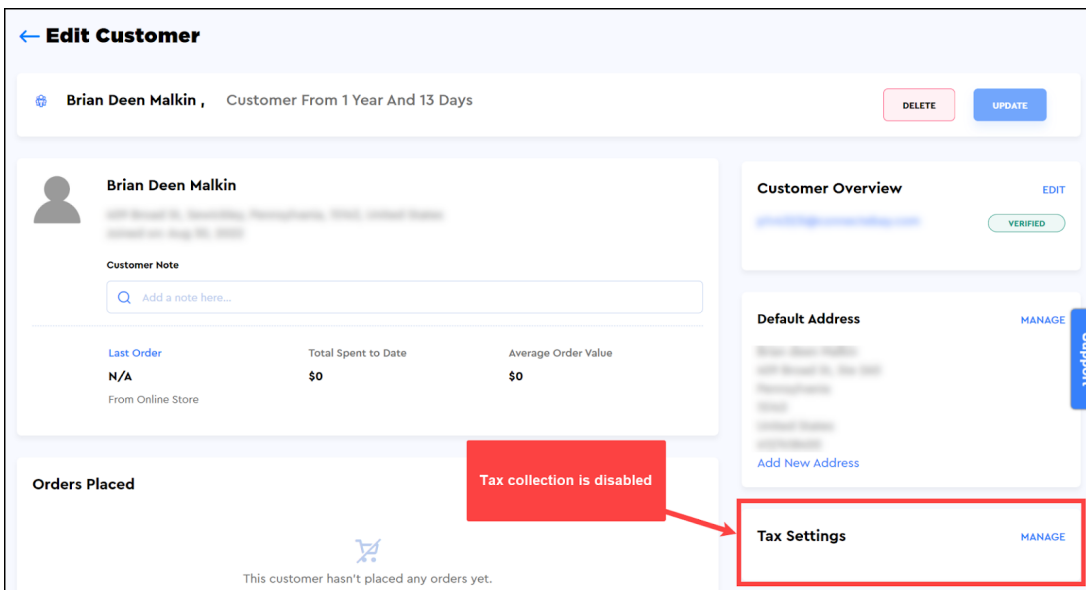
Disabling tax collection

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.



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.



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.

The screenshot displays a 'Timeline' section with a 'Show comments' toggle checked. Below the header is a text input field with icons for emojis, mentions, hashtags, and attachments, and a 'POST' button. The timeline contains two entries:

- 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