



Enabling and disabling tax collection for a customer

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

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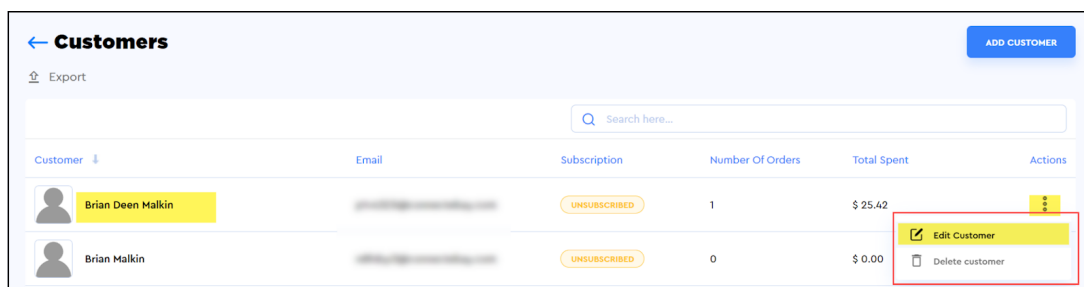
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If you are delivering the products in a region where you are not collecting taxes but want to collect a tax from a specific customer only, then you can explicitly enable tax collection for that customer from the **Cartzy admin panel**. Similarly, you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

Path: Customers > Customer record > Edit Customer

Enabling tax collection

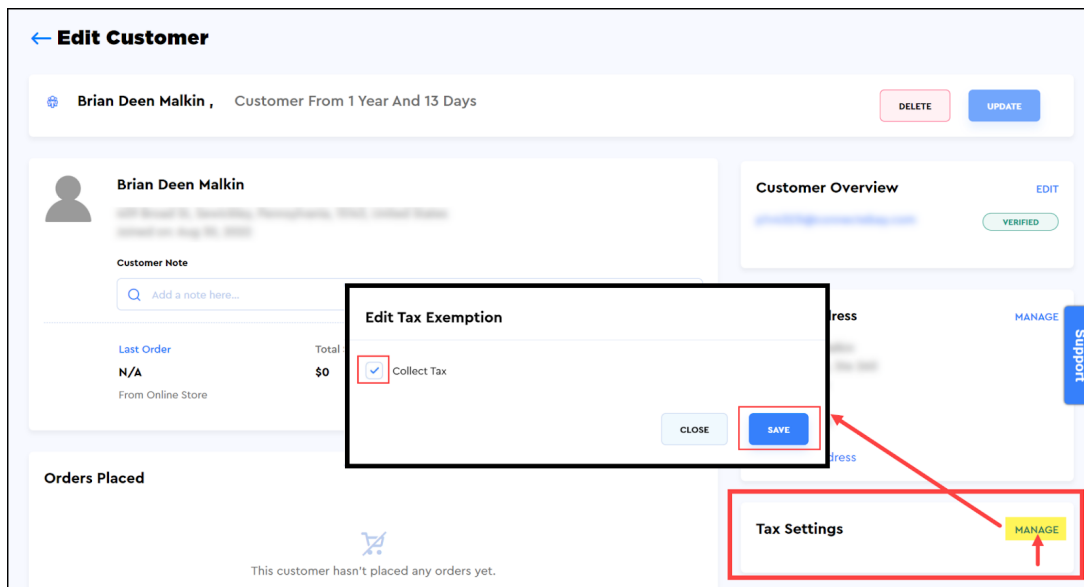
1. On the **Customers** page, open the customer in **edit mode**. To do so, click the **kebab menu icon** > select **Edit Customer**.



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'.

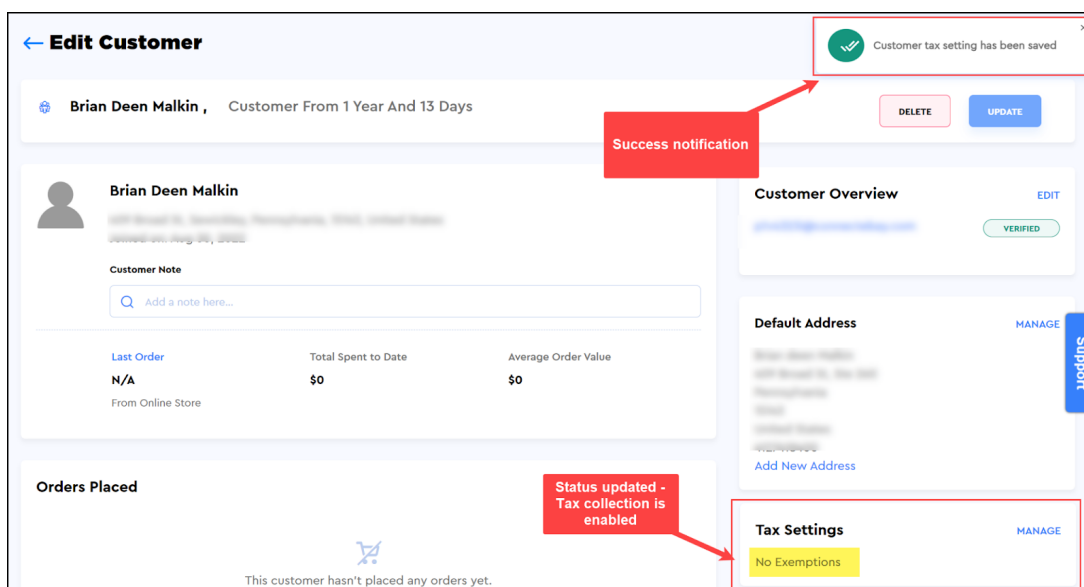
Customer	Email	Subscription	Number Of Orders	Total Spent	Actions
Brian Deen Malkin		UNSUBSCRIBED	1	\$ 25.42	
Brian Malkin		UNSUBSCRIBED	0	\$ 0.00	<input checked="" type="checkbox"/> Edit Customer <input type="checkbox"/> Delete customer

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