



Taxamo Assure WooCommerce Plugin Documentation

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Introduction

Grow your online business without VAT worries. The Taxamo Assure WooCommerce Plugin provides UK-based WooCommerce Merchants with a reliable EU VAT service. If you're a non-EU business selling physical goods to consumers in the EU, you are responsible to charge VAT on your sales and remit VAT to each country.

It can be complicated to manage the VAT calculations and monthly filings to the various countries according to their regulations. VAT errors can incur penalties to your business, or even result in VAT due by your customer at delivery which negatively impacts customer relationships and increases volumes of returns and refunds.

Taxamo Assure will manage the invoicing in your existing online checkout, and file all the required VAT reporting for you. Once you integrate the solution into your checkout process, it creates the invoice including calculation of the VAT due on every line item. The VAT due on each transaction is paid directly from your customers to Taxamo.

Once you integrate Assure, you'll be confident you're charging your customers the right VAT amount, and Taxamo will handle all the VAT filings and payments. With Taxamo Assure, there's no need for you to register and file monthly Import One Stop Shop (IOSS) VAT returns, so you can focus on selling.

Preliminary Setup

Before attempting to install the Taxamo Assure plugin you need to sign up to the Taxamo service.

You can sign up for a Sandbox account at:

<https://manage.sandbox.marketplace.taxamo.com/auth.html#self-signup/Taxamo> and/or a

Production account at:

<https://manage.marketplace.taxamo.com/auth.html#self-signup/Taxamo>.

As part of the Taxamo account set up you will generate an API token that will be needed to complete your WooCommerce set up. Please store this token securely until you are ready to set up the WooCommerce plugin.

Overview

Taxamo Assure is revolutionizing tax management for UK-based merchants selling into the EU. Today we support the sale of low value import goods into the EU, under the IOSS Scheme.

- The IOSS scheme came into effect from the 1st July 2021.
- The IOSS scheme applies to Merchants not VAT registered in the EU and not physically present in the EU.
- Today, the IOSS scheme applies to consignments up to €150.
- The burden the IOSS scheme places on businesses includes: determining IOSS eligibility per transaction, calculating the correct VAT rate, sending compliant invoices and showing IOSS compliance at audit.
- Taxamo Assure, allows Merchants to pass that IOSS burden to Taxamo and trade compliantly into the EU.

Taxamo Assure will be liable for VAT on IOSS sales, which removes the need for you to register, file, and remit VAT under Import One Stop Shop (IOSS).

Account and Pricing

An additional Taxamo account is required, and fees apply. The account is not created during plugin installation. To create an Account please visit the [product page](#) and you can select the Sign-up button. You can create a sandbox account initially for testing and then a production account when you are ready to go live.

The Taxamo Assure WooCommerce plugin is free to download and install. Taxamo will charge a £2 per transaction fee for each IOSS transaction supported. A fee is not charge for any transaction we cannot support e.g. a transaction over €150 or a B2B transaction – both of which are outside the current scope of IOSS.

Features

Taxamo Assure integrates into your customer checkout journey and controls the real-time VAT calculation, invoicing and VAT number validation on applicable sales. As you process sales, these transaction details are tracked and Taxamo Assure takes responsibility to file and remit the VAT due where Taxamo has the tax liability.

- Seamless integration with your checkout
 - The plugin connects to the Taxamo API's for sales and refunds
- Real-time VAT calculation
 - Calculates VAT due per line item at point of sale. This is on the checkout and not on the product pages.
 - Universal and dynamic pricing is supported (whether you load your products with tax inclusive pricing or tax exclusive pricing)
- Filing and remittance
 - Taxamo use their IOSS number for filing and remittance of VAT due for sales where Taxamo has the VAT liability.
- Business-to-business transaction validation
 - Automatic validation of VAT number for sales to business customers.
- Invoicing
 - Invoice generation and customisation. Taxamo will create a VAT invoice for the buyer where Taxamo has the VAT liability.
- On-demand VAT report
 - Instant reporting on VAT position through the Taxamo Dashboard
- Automated settlement
 - Automatic reconciliation of VAT and parcel commission against your credit card. The VAT due and fee is charged to your credit card

Use Case

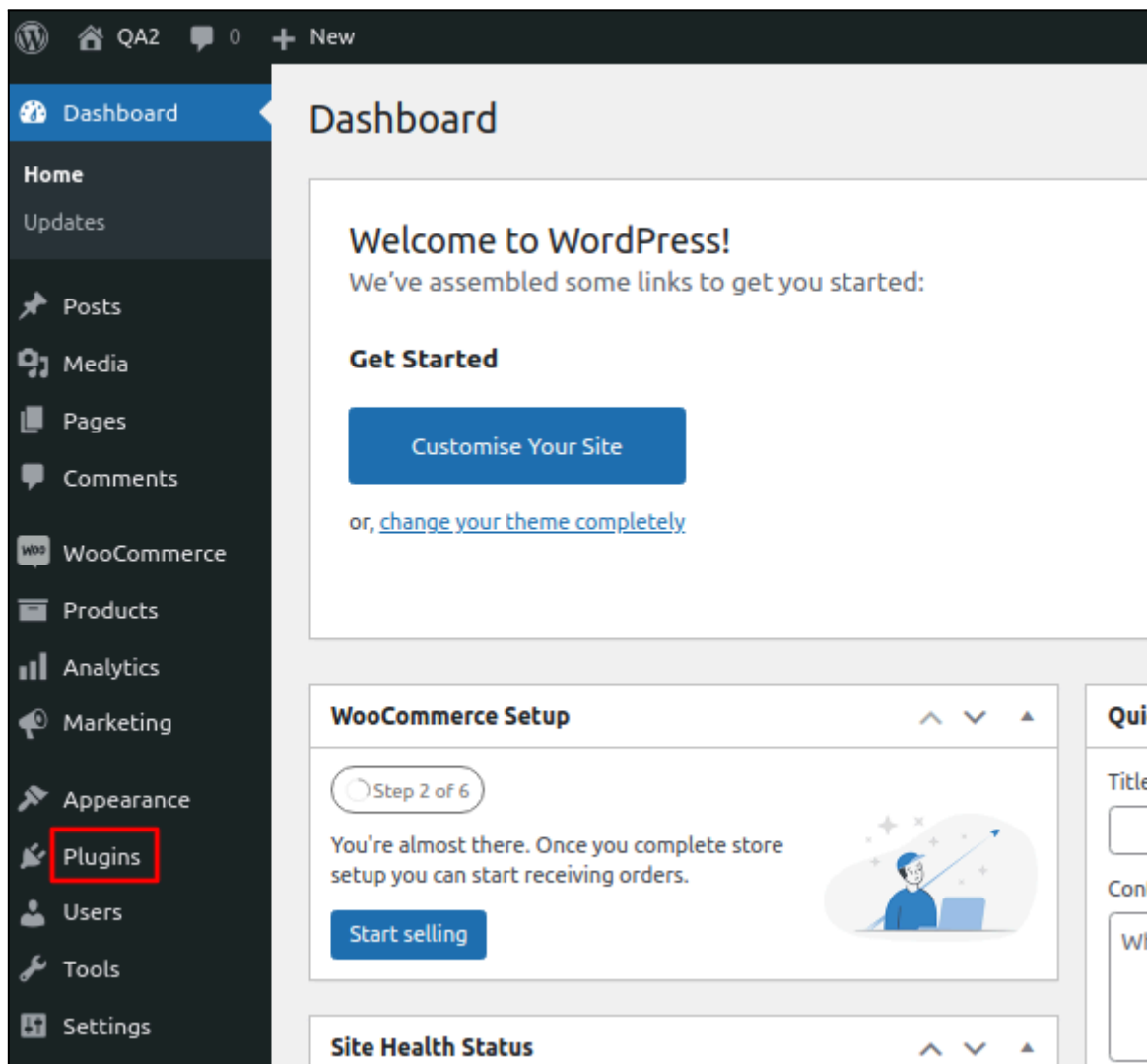
You are a UK-based Merchant selling into the EU. You import low value goods into the EU for sale to B2C customers. You do not wish to register for VAT via an intermediary for IOSS. By using Taxamo Assure, you will use Taxamo's IOSS number and Taxamo will be responsible for the VAT for the sales under IOSS. Taxamo will be responsible for filing the IOSS return each month. You will provide Taxamo's IOSS number to your parcel carrier for the relevant IOSS sales.

Frequently Asked Questions

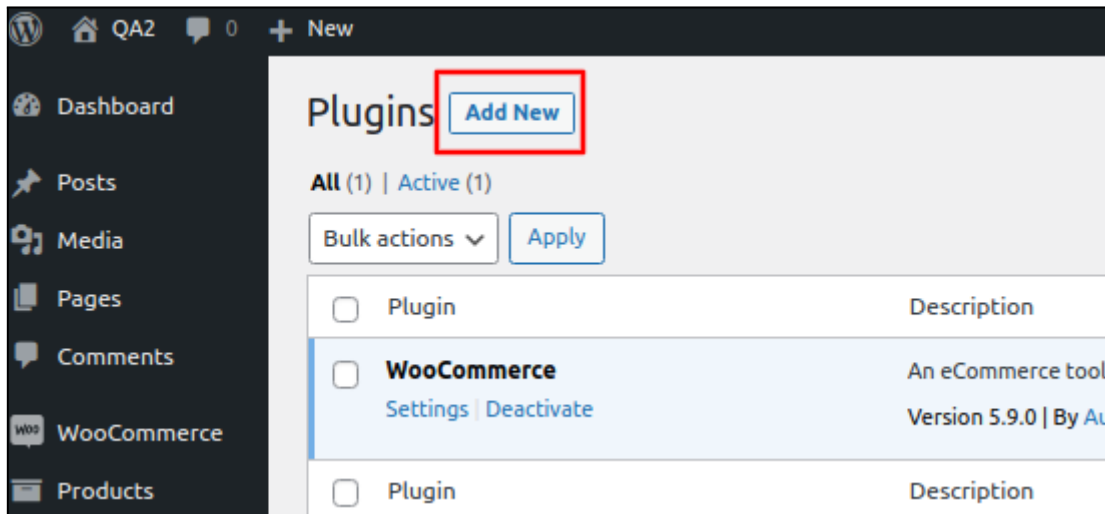
Please find more information under [frequently asked questions](#).

Plugin Installation

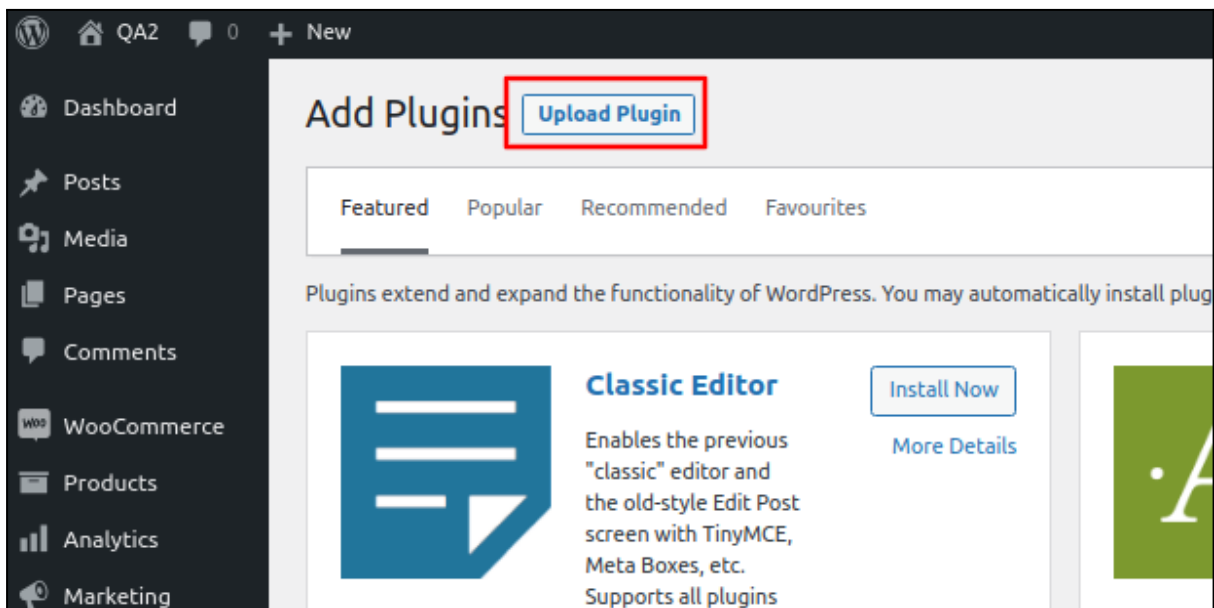
- From the WordPress Dashboard select Plugins from the left navigation.



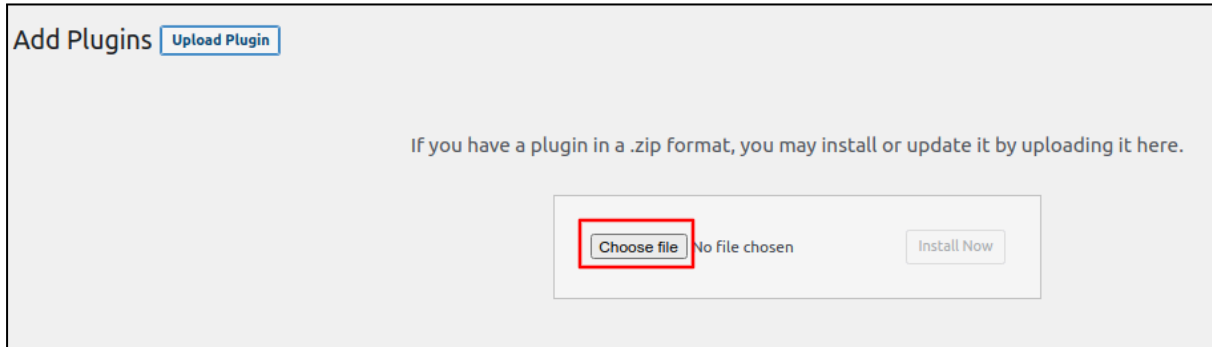
- Click the Add New button.



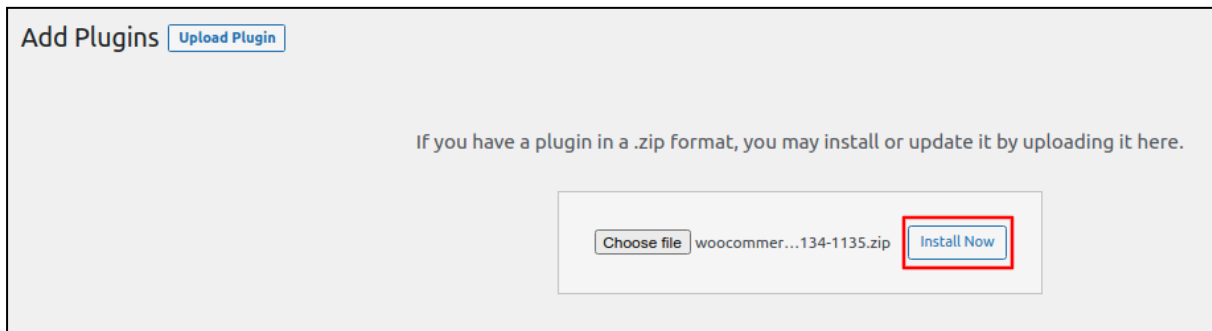
- Click the Upload Plugin button.



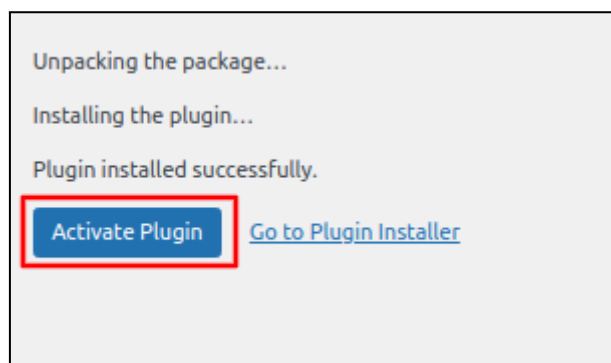
- Click the Choose File button.



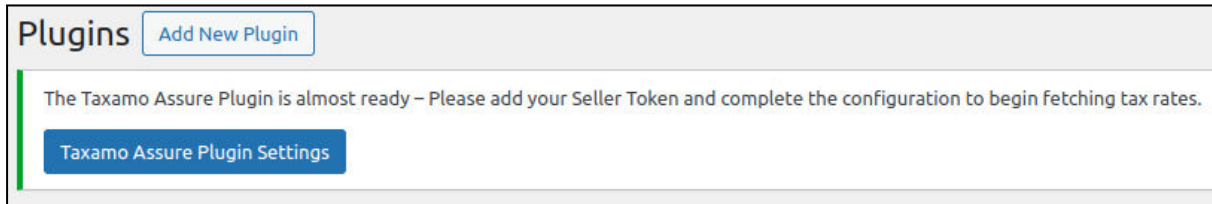
- Click the Install Now button.



- Click the Activate Plugin button.



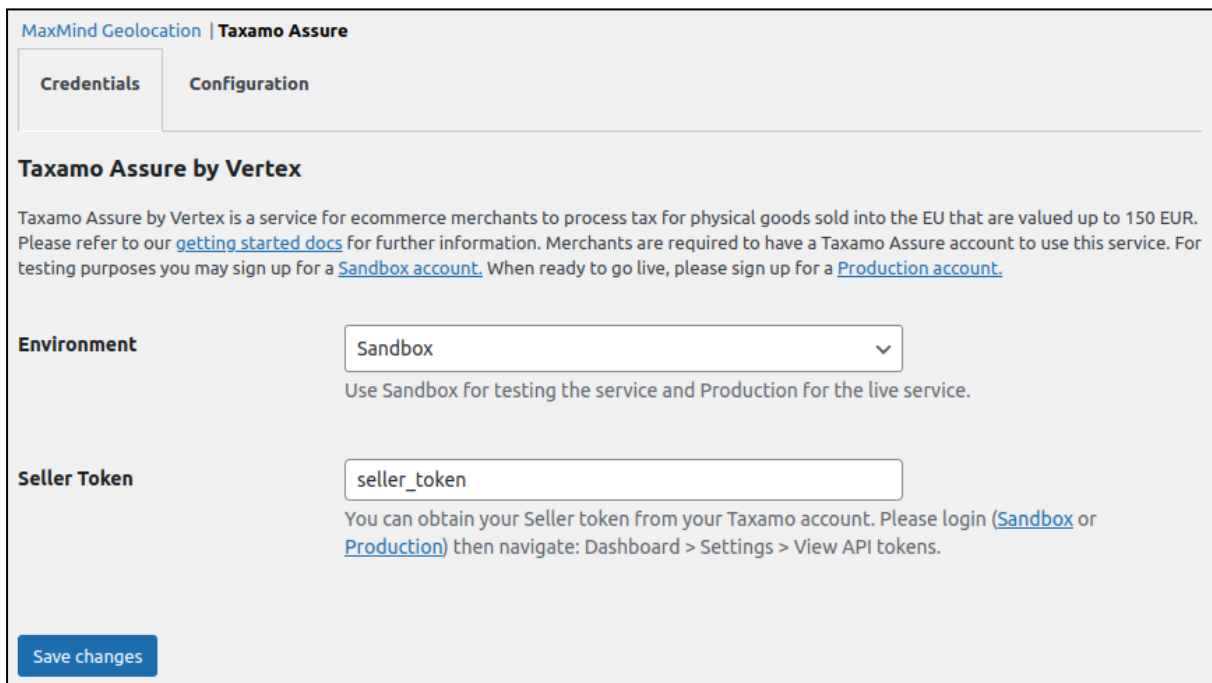
- Click the Taxamo Assure Plugin Settings button.



The screenshot shows the 'Plugins' section of a WordPress dashboard. At the top left, the word 'Plugins' is displayed next to an 'Add New Plugin' button. Below this, a message states: 'The Taxamo Assure Plugin is almost ready – Please add your Seller Token and complete the configuration to begin fetching tax rates.' A prominent blue button labeled 'Taxamo Assure Plugin Settings' is positioned below the message.

Taxamo Assure Settings Page:

Credentials Tab:



The screenshot displays the 'Taxamo Assure' configuration page, specifically the 'Credentials' tab. The page title is 'MaxMind Geolocation | Taxamo Assure'. There are two tabs: 'Credentials' (selected) and 'Configuration'. The main heading is 'Taxamo Assure by Vertex'. Below this, a paragraph explains the service: 'Taxamo Assure by Vertex is a service for ecommerce merchants to process tax for physical goods sold into the EU that are valued up to 150 EUR. Please refer to our [getting started docs](#) for further information. Merchants are required to have a Taxamo Assure account to use this service. For testing purposes you may sign up for a [Sandbox account](#). When ready to go live, please sign up for a [Production account](#).' The 'Environment' field is a dropdown menu currently set to 'Sandbox', with a note: 'Use Sandbox for testing the service and Production for the live service.' The 'Seller Token' field is a text input containing 'seller_token', with a note: 'You can obtain your Seller token from your Taxamo account. Please login ([Sandbox](#) or [Production](#)) then navigate: Dashboard > Settings > View API tokens.' A 'Save changes' button is located at the bottom left.

Configuration Tab:

MaxMind Geolocation | **Taxamo Assure**

Credentials | **Configuration**

Taxamo Assure by Vertex

Taxamo Assure by Vertex is a service for ecommerce merchants to process tax for physical goods sold into the EU that are valued up to 150 EUR. Please refer to our [getting started docs](#) for further information. Merchants are required to have a Taxamo Assure account to use this service. For testing purposes you may sign up for a [Sandbox account](#). When ready to go live, please sign up for a [Production account](#).

Enable VAT Number Field Enable VAT Number Field
Allow businesses to enter their VAT number during checkout. Validated business transactions will be VAT exempt.

Provide Invoice Link Provide Invoice Link
Taxamo Assure will send the customer the sole VAT invoice for their Assure transactions via email. Additionally, a link can be offered to the customer to see their invoice after checkout, if selected here. As an optional step: you can personalise the invoice template in your Taxamo Assure account. Please login ([Sandbox](#) or [Production](#)) then navigate: Dashboard > Settings > Customize invoices.

Debug Log Enable Logging
Log Taxamo Assure Plugin events. This is useful for Developers and the Taxamo Helpdesk to provide support and troubleshooting. You can view the logs within WooCommerce at: Dashboard > WooCommerce > Status > [Log](#)

Force Universal Pricing Force Universal Pricing
Enabling this option makes Taxamo calculate VAT in such a way, that the final price is always the same as the price provided.

[Save changes](#)

Taxamo Plugin Settings Configuration

Credentials

Environment

- Options are Sandbox or Production. Use Sandbox for testing the service and Production for the live service.

Environment Sandbox ▼

Use Sandbox for testing the service and Production for the live service.

Seller Token

- Enter your Assure Seller Token. You can obtain your Seller token from your Taxamo account. Please login (Sandbox or Production) then navigate: Dashboard > Settings > View API tokens.

Seller Token	<input type="text" value="seller_token"/>
You can obtain your Seller token from your Taxamo account. Please login (Sandbox or Production) then navigate: Dashboard > Settings > View API tokens.	

Configuration


Enable VAT Number Field

- The VAT number field will become available to Customers on checkout if this option is checked. This allows Customers to enter their VAT Number to obtain an exemption from VAT. This is primarily used for Business to Business transactions, ie. the Customer is purchasing for their business. The Customers VAT number is sent to Taxamo for calculation.

Enable VAT Number Field	<input type="checkbox"/> Enable VAT Number Field
Allow businesses to enter their VAT number during checkout. Validated business transactions will be VAT exempt.	

Provide Invoice Link


- If you check the Show Invoices setting this will enable the creation of an invoice in your Taxamo account. The Customer can also obtain a copy of the Taxamo invoice via the My Account area when they are logged into your WooCommerce store. The Customer will see a button to obtain a HTML formatted Taxamo Invoice when their Order is in a Complete status in WooCommerce.

Provide Invoice Link  Provide Invoice Link

Taxamo Assure will send the customer the sole VAT invoice for their Assure transactions via email. Additionally, a link can be offered to the customer to see their invoice after checkout, if selected here. As an optional step: you can personalise the invoice template in your Taxamo Assure account. Please login ([Sandbox](#) or [Production](#)) then navigate: Dashboard > Settings > Customize invoices.

Debug Log


- Enabling this will allow the plugin to log Taxamo events in the WooCommerce Logs, located in Admin > WooCommerce > Status > Logs.

Debug Log  Enable Logging

Log Taxamo Assure Plugin events. This is useful for Developers and the Taxamo Helpdesk to provide support and troubleshooting. You can view the logs within WooCommerce at: Dashboard > WooCommerce > Status > [Log](#)

Force Universal Pricing

- Enabling this option makes Taxamo calculate VAT in such a way that the final price is always the same as the price provided. This will ensure the price is consistent to all Customers regardless of their tax jurisdiction. You should keep in mind that it also means the tax exclusive price they receive will differ between sales that are in different jurisdictions.

Force Universal Pricing  Force Universal Pricing

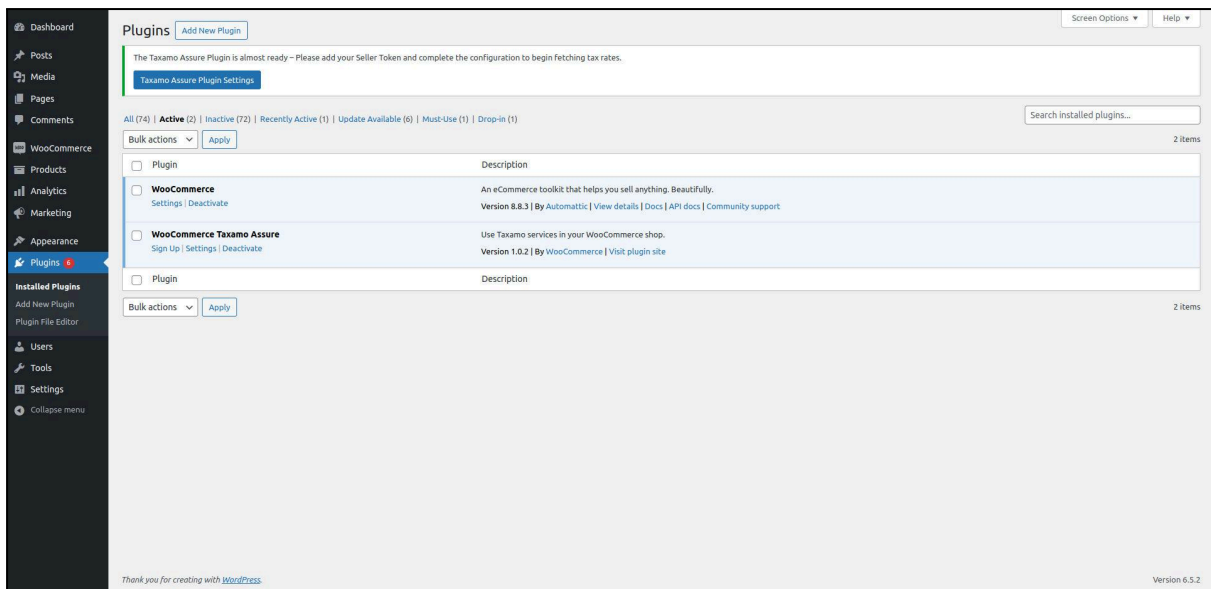
Enabling this option makes Taxamo calculate VAT in such a way, that the final price is always the same as the price provided.

First Time Install Wizard

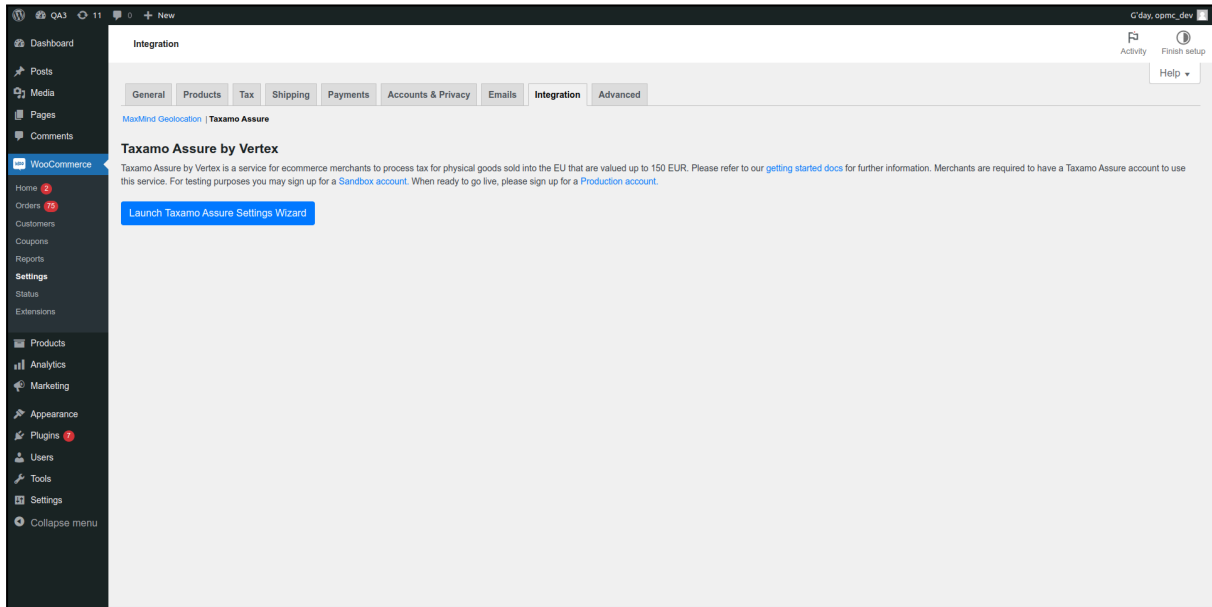
Great! Now you've installed the plugin. You will now be presented with a Wizard Flow to take you through the steps needed to finalise your integration with Taxamo Assure and get you up and running. We've included detailed information on each step of the process below.

Wizard Flow

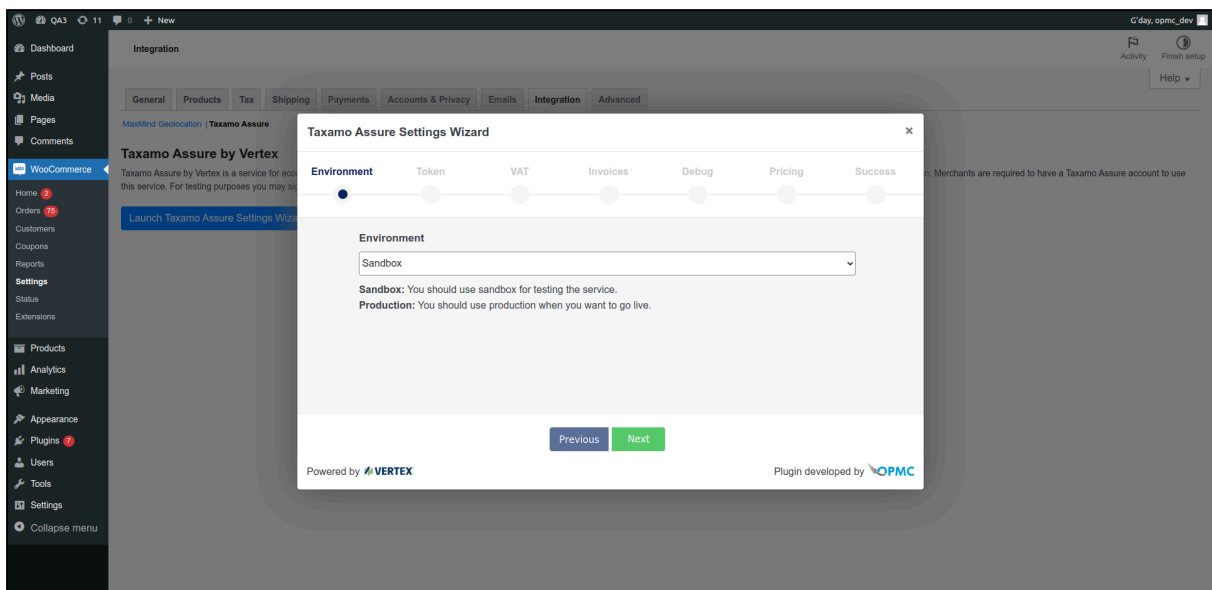
Assuming you have installed and activated the plugin (as per above steps), you will be presented with this notification message.

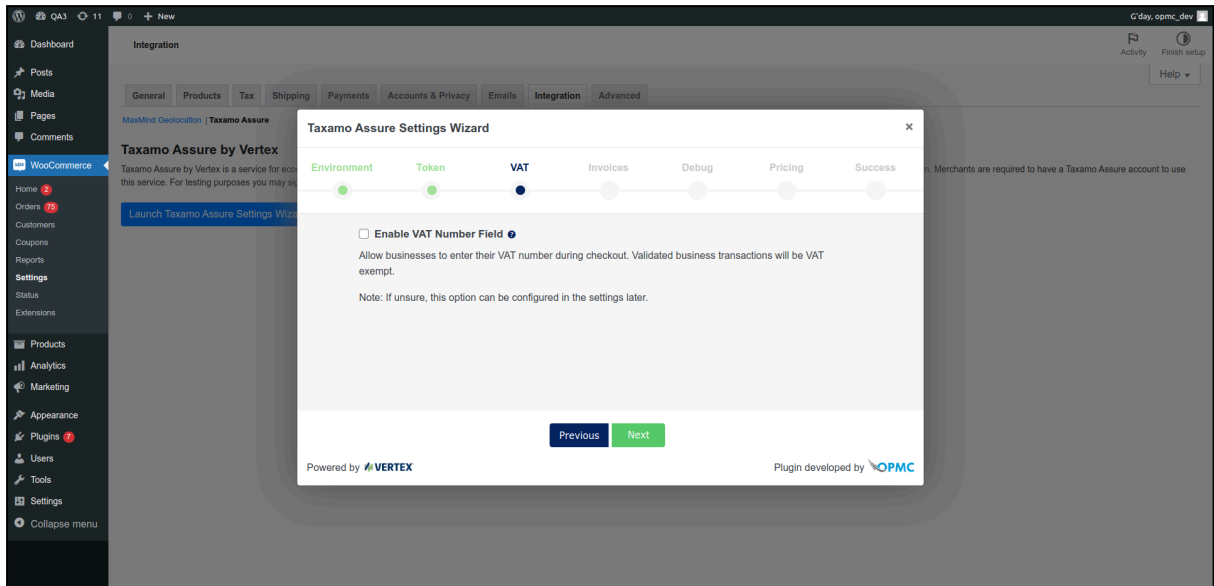
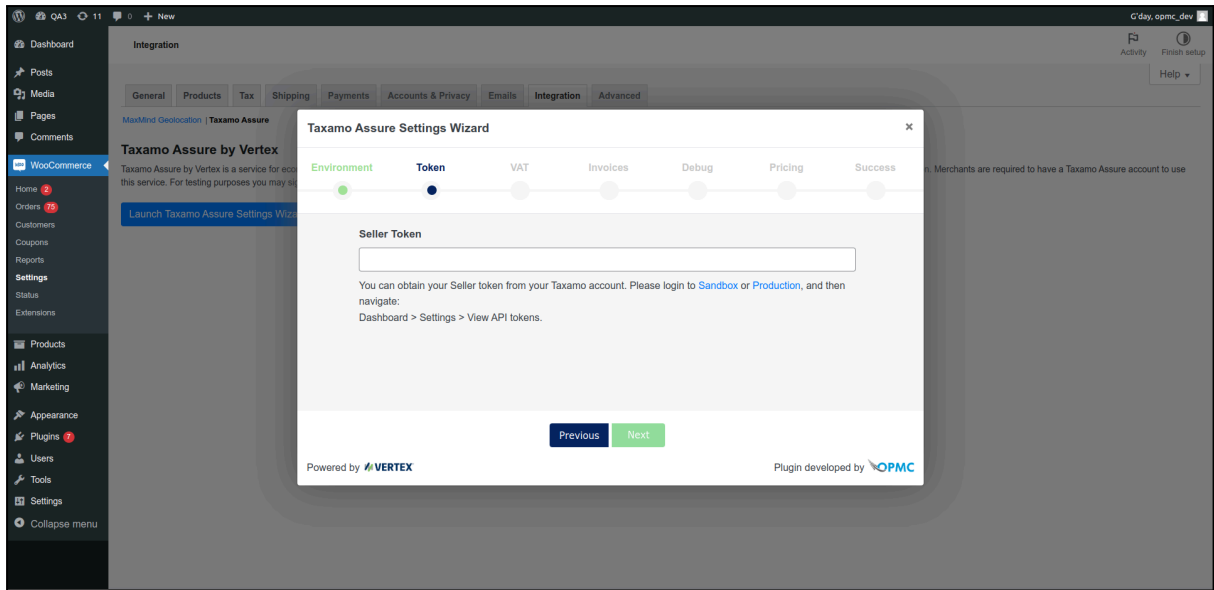


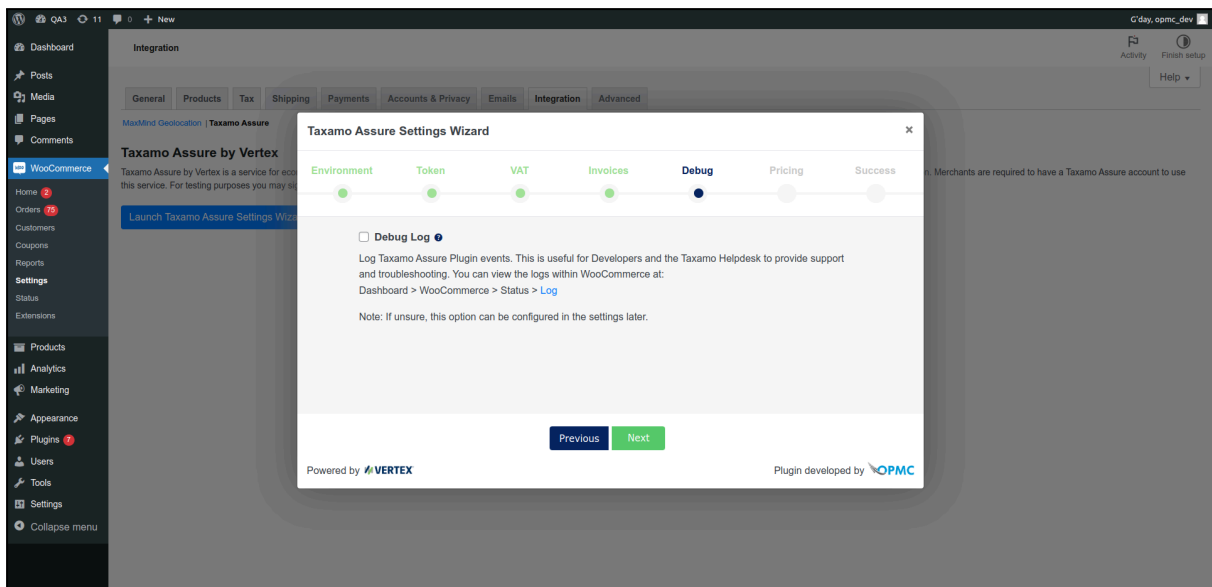
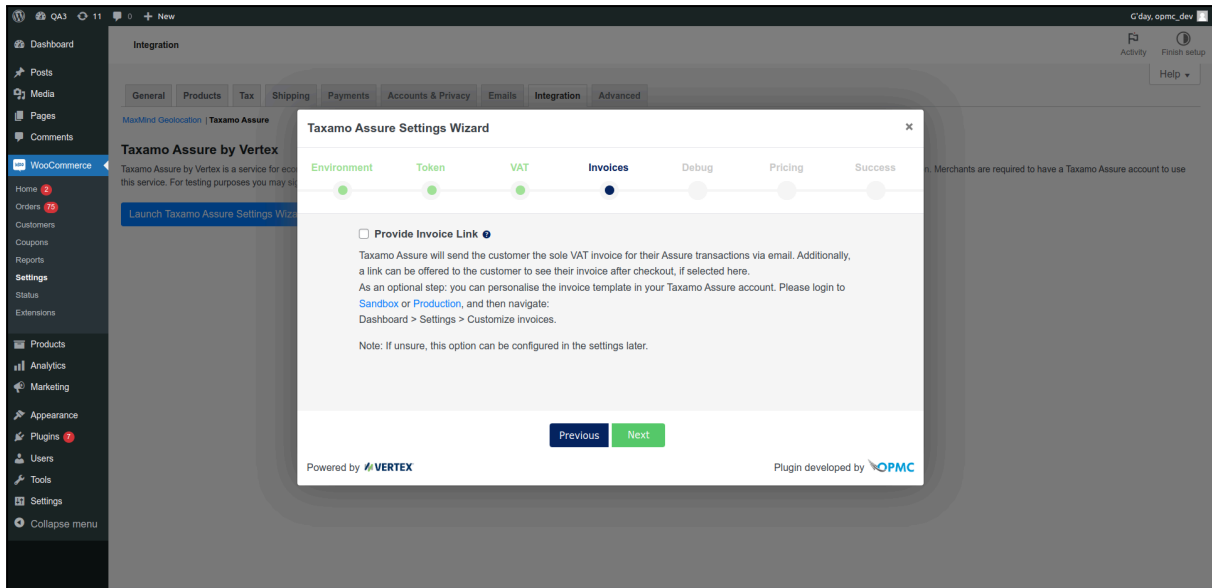
Click the Launch Taxamo Assure Settings Wizard button.

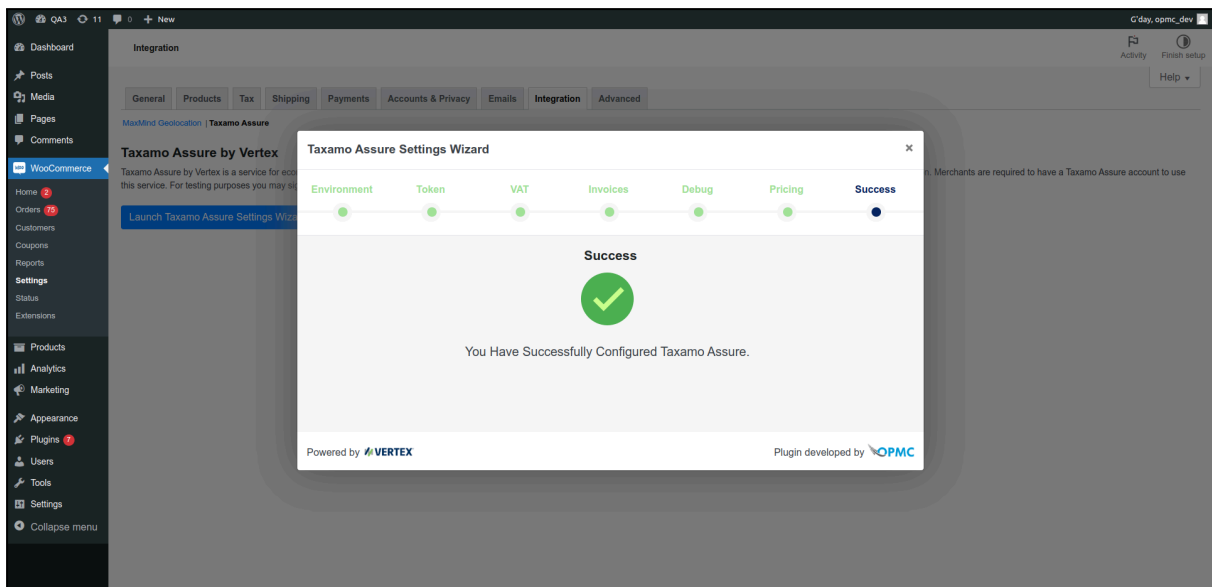
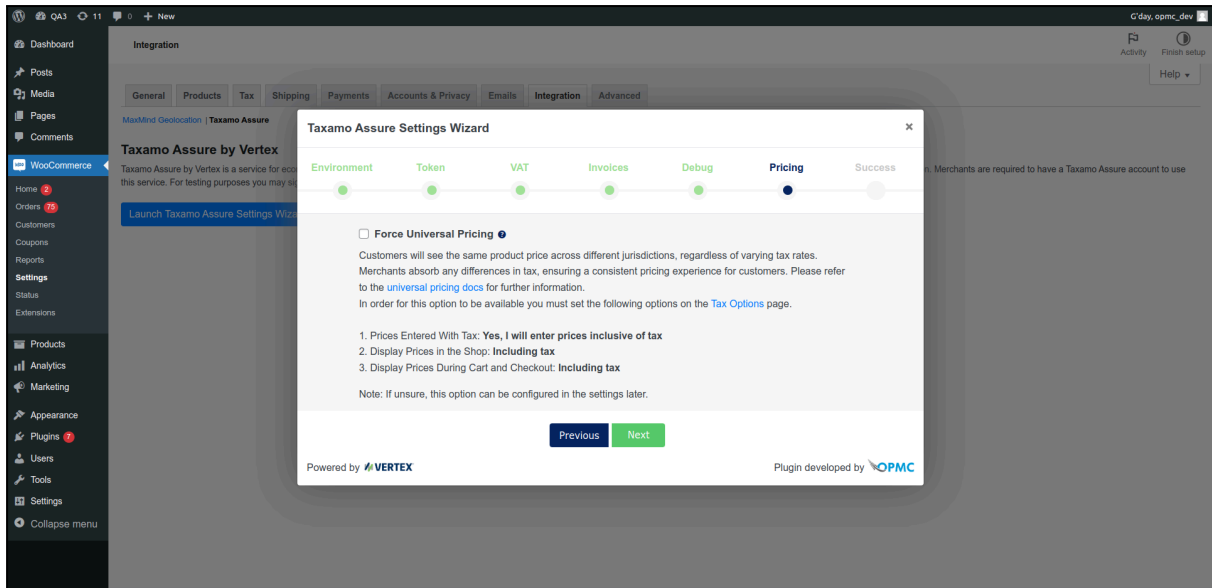


You will now be stepped through each Wizard screen.









Following the Success page, the Wizard redirects you to the normal Settings page, as per above.

Product Configuration

Available in Taxamo Assure only, is the ability to add a Product CN Code to individual products.

Product CN Code

- This setting can be found under the General tab when you Edit a Product. The CN code can be obtained from the Taxamo account under Product Classification.
- Taxamo Assure typically calculates tax at the standard rate for a jurisdiction. One exception is books, where a reduced rate can be availed of, if it is available in the buyer's jurisdiction. To avail of the reduced rate for books, a Product CN Code will need to be provided. Read more on CN codes [here](#). To add CN codes via the WooCommerce plugin, from your WooCommerce Dashboard go: Products > Edit a Product > Vertex product CN code. Where a CN code is not provided, Taxamo will always calculate tax using the standard rate of tax for that jurisdiction.

Vertex product CN code	<input type="text"/>
------------------------	----------------------

Customer Checkout

- Examples of Taxamo VAT calculations on Checkout

Billing details		Your order	
First name <small>*</small>	Last name <small>*</small>	Product	Subtotal
<input type="text"/>	<input type="text"/>	Vneck Tshirt × 1	€130.90
Company name (optional)	<input type="text"/>	Subtotal	€130.90
Country/Region <small>*</small>	<input type="text" value="Germany"/>	Total	€130.90 (includes €20.90 VAT DE E-SERVICE estimated for Germany)
Street address <small>*</small>	<input type="text" value="House number and street name"/>		

Billing details		Your order	
First name <small>*</small>	Last name <small>*</small>	Product	Subtotal
<input type="text"/>	<input type="text"/>	Vneck Tshirt × 1	€132.00
Company name (optional)	<input type="text"/>	Subtotal	€132.00
Country/Region <small>*</small>	<input type="text" value="France"/>	Total	€132.00 (includes €22.00 VAT FR E-SERVICE)
Street address <small>*</small>	<input type="text"/>		




Note in the examples above the difference in Tax calculator for the same product. Taxamo has calculated the tax based on the Customer country which is different in the 2 examples.

Completed Order

Customer

Order details	
Product	Total
Vneck Tshirt × 1	€120.00
Polo × 1	€20.00
Subtotal:	€140.00
Shipping:	Free shipping
Payment method:	Cash on delivery
Total:	€140.00 (includes €20.00 VAT FR E-SERVICE, €1.82 VAT)

Merchant

Order #88 details				
Payment via Windcave. Paid on 21 July 2022 @ 1:43 am. Customer IP: 101.182.72.94				
General		Billing		Shipping
Date created: 2022-07-21 @ 01:43		John Doe 3 Bd des Capucines 75002 PARIS France		John Doe 3 Bd des Capucines 75002 PARIS France
Status: Processing		Email address: dfhdjhfbv@dfkjdjfnvkjdfvdfv.dfvdf		
Customer: Guest		Phone: 12321321321		
Product	Cost	Qty	Total	FR EUROPEAN VAT PHYSICAL
 Vneck Tshirt SKU: vneck	€15.00	× 2	€30.00	€6.00
 FR EUROPEAN VAT PHYSICAL SERVICE			€2.00	-
 Flat rate Items: Vneck Tshirt × 2			€10.00	-
			Items Subtotal:	€30.00
			Fees:	€2.00
			Shipping:	€10.00
			FR EUROPEAN VAT PHYSICAL:	€8.00
			Order Total:	€50.00

Refund

To refund an order you would navigate to the relevant order, ie Dashboard > WooCommerce > Orders. Then click on the Order.

- Click the Refund button.

Order #47 details
Payment via Cash on delivery. Customer IP: 101.182.120.156

General
Date created: 2021-12-16 @ 02:27
Status: Processing
Customer: Guest

Billing
Test Test
75000 PARIS
Email address: test@testing,jbbdfvjhb
Phone: 123456789

Shipping
Address: No shipping address set.

Product	Cost	Qty	Total	VAT FR E-SERVICE
Vneck Tshirt SKU: vneck	€100.00	x 1	€100.00	€20.00

Items Subtotal: €100.00
VAT FR E-SERVICE: €20.00
Order Total: €120.00

[Refund](#) This order is no longer editable.

Order actions
Choose an action...
[Move to Trash](#) [Update](#)

Order notes
Payment to be made upon delivery. Order status changed from Pending payment to Processing.
16 December 2021, at 2:27 am [Delete note](#)

Add note
Private note [Add](#)

- Enter the Quantity and Total.
- Click Refund.

Product	Cost	Qty	Total	VAT FR E-SERVICE
Vneck Tshirt SKU: vneck	€100.00	x 1	€100.00	€20.00

Restock refunded items:

Amount already refunded: -€0.00




Total available to refund: €120.00

Refund amount:


Reason for refund (optional):

[Cancel](#) [Refund €120.00 manually](#)

The refund has been processed.

Product	Cost	Qty	Total	VAT FR E-SERVICE
 Vneck Tshirt SKU: vneck	€100.00	× 1	€100.00	€20.00
		↔ -1	↔ -€100.00	↔ -€20.00
 Refund #48 - 16 December 2021, 2:30 am by opmc_dev			-€120.00	
Items Subtotal:				€100.00
VAT FR E-SERVICE:				€20.00
Order Total:				€120.00
Refunded:				-€120.00
Net Payment:				€0.00
 This order is no longer editable.				

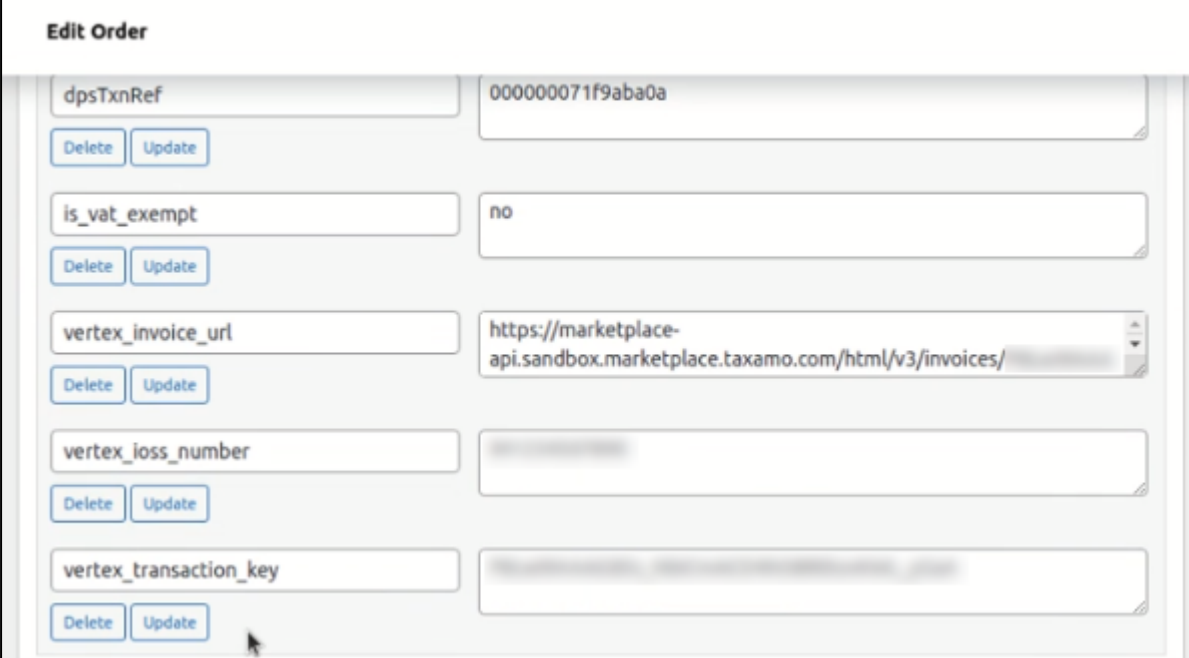
Orders overview page showing the Order has been successfully refunded.

Order	Date	Status	Total
<input type="checkbox"/> #47 Test Test	 4 mins ago	Refunded	€120.00 €0.00

IOSS Number

The IOSS scheme allows suppliers and electronic interfaces selling imported goods to buyers in the EU to collect, declare and pay the VAT to the tax authorities, instead of making the buyer pay the VAT at the moment the goods are imported into the EU.

Taxamo API v3 will return an IOSS number which is then stored in the WooCommerce Order. This can be passed electronically to your parcel carrier.



The screenshot shows the 'Edit Order' form with the following fields and values:

Field Name	Value
dpsTxnRef	000000071f9aba0a
is_vat_exempt	no
vertex_invoice_url	https://marketplace-api.sandbox.marketplace.taxamo.com/html/v3/invoices/
vertex_iss_number	[REDACTED]
vertex_transaction_key	[REDACTED]

! Warning

Do not share this number with anyone other than your parcel carrier.

! Warning

You need to ensure that you are using the Production system.

! Warning

You should not provide the service's IOSS number to your Parcel Carrier or use it in any way for transactions where Taxamo does not become VAT liable, as these transactions are not IOSS eligible and this would result in a false declaration.