



Taxamo Assure Magento Extension Documentation

Table of Contents

Table of Contents	2
Introduction	3
Preliminary Setup	4
Overview	4
Account and Pricing	5
Features	5
Use Case	6
Frequently Asked Questions	6
Extension Installation	6
Manual Installation.	6
Adobe Commerce Marketplace Instructions	7
Extension Configuration	8
Taxamo Assure Settings Page	8
Taxamo Extension Settings Configuration	9
Enable	9
Enable Debug Log	9
Mode	9
API Token	9
Enabled Countries	9
Ship From Address - Postal Code	9
Ship From Address - Country Code	10
Tax Liability Message	10
Show Invoices	10
Store Tax Cron Expression	10
Confirm Tax Cron Expression	10
Refund Cron Expression	10
Enable Log Cleaning	11
Log Clean Cron Expression	11
Log retention days	11
First Time Install Wizard	11
Wizard Flow	11
Switch from Sandbox to Production	16
Product Configuration	16
Product CN Codes	16
Customer Checkout	17
IOSS Number	18

Introduction

Grow your online business without VAT worries. The Taxamo Assure Magento Extension provides UK-based Magento 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 Extension 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 Magento set up. Please store this token securely until you are ready to set up the Magento extension.

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 extension 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 Magento extension 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 extension 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](#).

Extension Installation

Manual Installation.

ie.: a non Adobe Marketplace installation

1. Navigate to the Tax folder in your website's file system, ie:

- Magento root folder > app > code> Taxamo > Tax.
- Then upload the Vertex Assure Magento zip file and extract the file on your server.

2. Enter the following at command line to verify the extension is installed properly:

- `bin/magento module:status Taxamo_Tax`

3. Enable the extension and clear static view files:

- `bin/magento module:enable Taxamo_Tax --clear-static-content`

4. Register the extension:

- `bin/magento setup:upgrade`

5. Recompile your project:

- `bin/magento setup:di:compile`

6. Verify that the extension is enabled:

- `bin/magento module:status Taxamo_Tax`

7. Clean the cache:

- `bin/magento cache:clean`

Adobe Commerce Marketplace Instructions

In order to install the Taxamo Assure extension from the Adobe Commerce Marketplace, we recommend following their [installation instructions](#) found at:

<https://experienceleague.adobe.com/en/docs/commerce-operations/installation-guide/tutorials/extensions>

Extension Configuration

Taxamo Assure Settings Page

Navigate to: Dashboard > Stores > Configuration > Sales > Tax > Taxamo.

Taxamo

Enable [store view] Yes
Enable Taxamo

Enable Debug Log [store view] Yes Use system value
Enables debug logging for diagnosing issues

Mode [store view] Sandbox Use system value
API Mode

API Token [store view] seller_token_test
Your unique Taxamo API key

By clicking this button, your configuration will be changed. Please ensure the correct API key is included.

Enabled Countries [store view]

Austria
Belgium
Bulgaria
Croatia
Cyprus
Czechia
Denmark
Estonia
Finland
France

Specify the countries which Taxamo can be enabled for.

Ship From Address - Postal Code [store view]
The 'postal code' to use as the 'Ship From' address.

Ship From Address - Country Code [store view] Great Britain and Northern Ireland
The 'country' to use as the 'Ship From' address.

Tax Liability Message [store view] Taxamo cannot accept liability for the tax.
The message to show the customer if Taxamo cannot accept liability for the tax.

Show Invoices [store view] Yes Use system value
Show Taxamo Invoice to Buyer

Store Tax Cron Expression [global] */2 * * * * Use system value
Expression to use for schedule of Cron job for storing the transaction at Taxamo

Confirm Tax Cron Expression [global] */2 * * * * Use system value
Expression to use for schedule of Cron job for confirming the transaction at Taxamo

Refund Cron Expression [global] */5 * * * * Use system value
Expression to use for schedule of Cron job for sending refund transactions to Taxamo

Enable Log Cleaning [global] Yes Use system value
If enabled logs are cleaned by a cron job

Log Clean Cron Expression [global] 0 0 * * * Use system value
Expression to use for schedule of Cron job when cleaning is enabled

Log retention days [global] 3 Use system value
Number of days to retain logs for when cleaning is enabled

Taxamo Extension Settings Configuration

Enable

- Allows you to toggle the extension to be active or inactive on your website.

Enable Debug Log

- Enabling this will allow the Extension to log Taxamo events in the Magento Logs,

Mode

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

API 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.

Enabled Countries

- Choose the countries you would like to enable the service for.
- IOSS works when you are not registered in any EU Member State. If you are registered in any EU member States, you are not eligible to use our service.

Ship From Address - Postal Code

- Enter the postcode you are shipping from.

Ship From Address - Country Code

- Enter the Country you are shipping from.

Tax Liability Message

- The message to show the customer if Taxamo cannot accept liability for the tax.

Show Invoices

- As part of shifting the VAT liability to Taxamo Assure for IOSS transactions, Taxamo are require to issue the customer's sole VAT invoice for the transaction. These will always be sent by email to the buyer. By selecting show invoice a link to the invoice will also show on the order/ transaction confirmed screen. Note you can customise the VAT invoice's appearance e.g. add your logo from inside your Taxamo account under Settings.

Store Tax Cron Expression

- Expression to use for schedule of Cron job for storing the transaction at Taxamo

Confirm Tax Cron Expression

- Expression to use for schedule of Cron job for confirming the transaction at Taxamo

Refund Cron Expression

- Expression to use for schedule of Cron job for sending refund transactions to Taxamo

Enable Log Cleaning

- If enabled logs are cleaned by a cron job

Log Clean Cron Expression

- Expression to use for schedule of Cron job when cleaning is enabled

Log retention days

- Number of days to retain logs for when cleaning is enabled

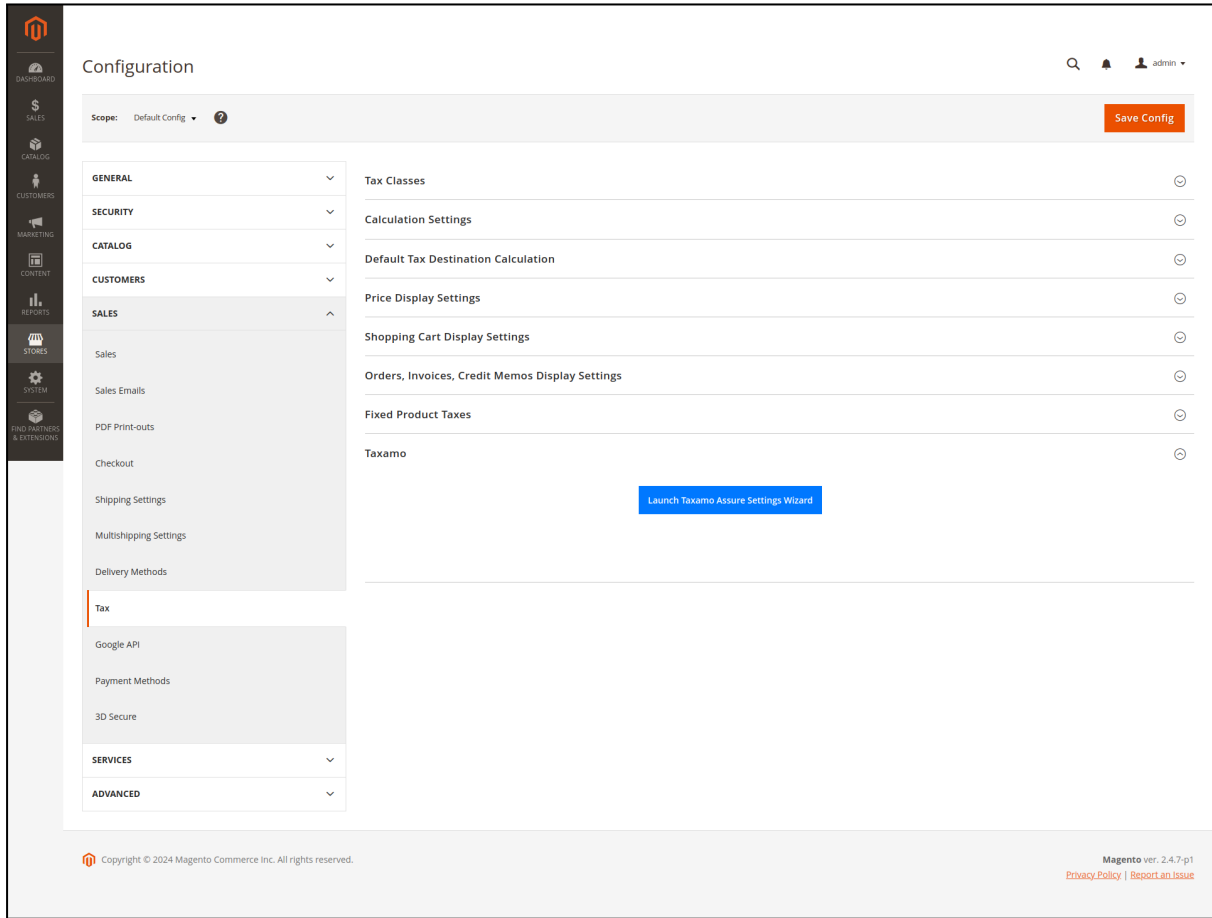
First Time Install Wizard

Now you've installed the Extension. 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.

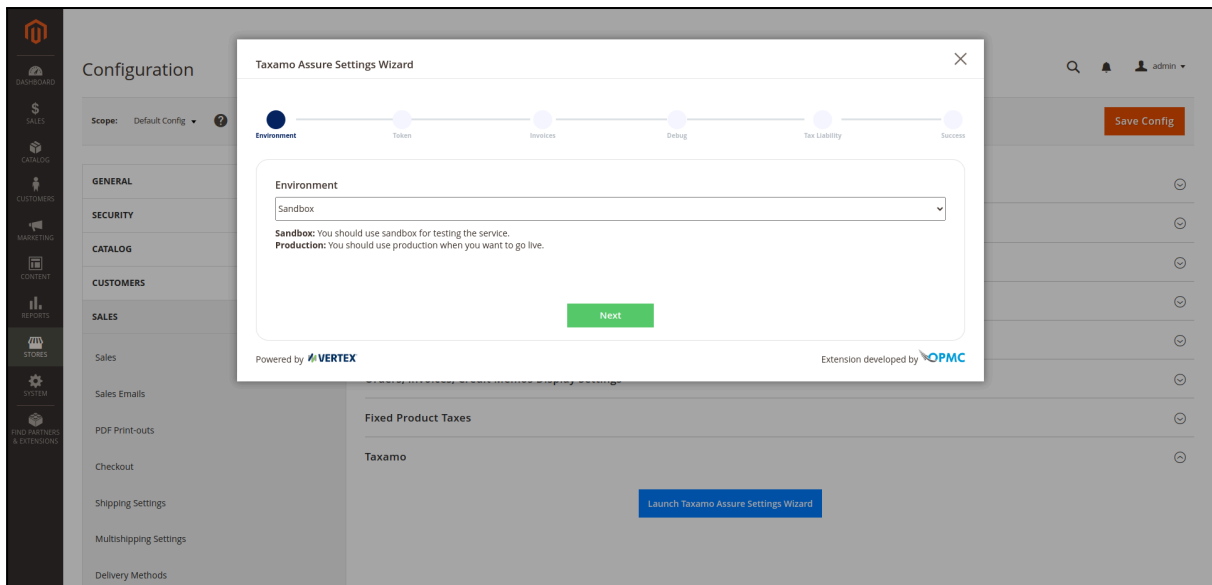
Wizard Flow

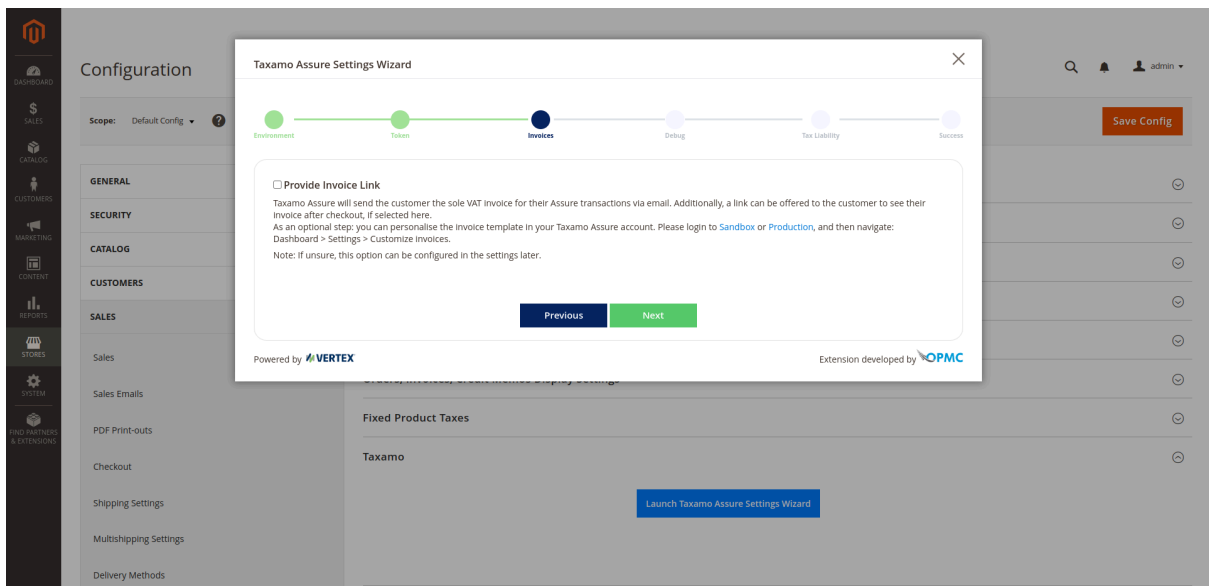
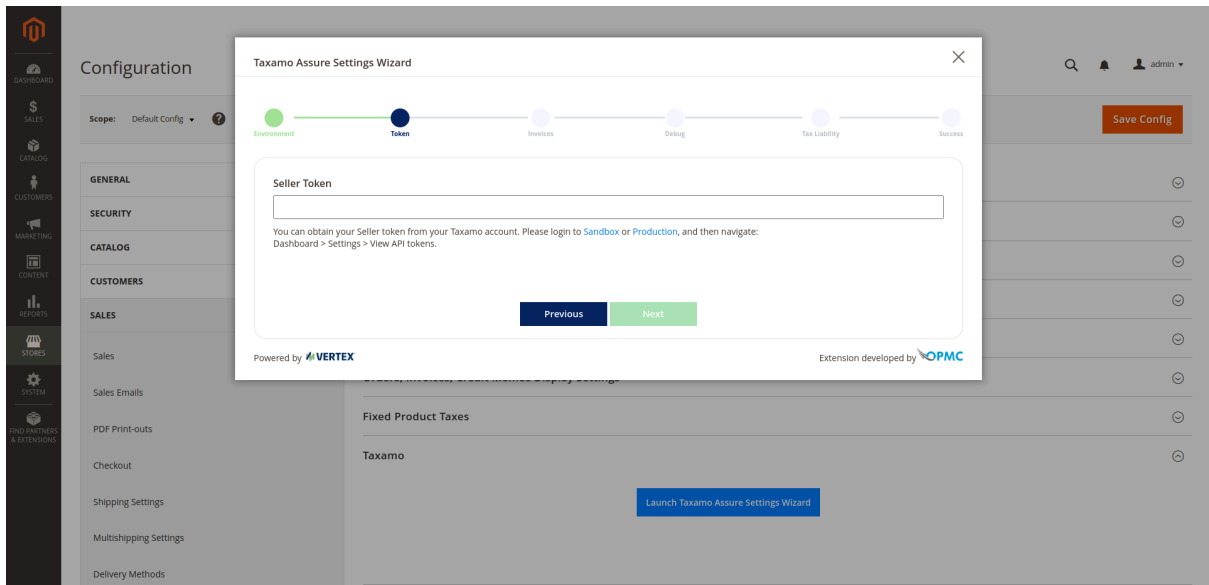
Assuming you have installed and activated the Extension (as per above steps). Click the Launch Taxamo Assure Settings Wizard button. You will now be stepped through each Wizard screen. Following the Success page, the Wizard redirects you to the normal Settings page, as per above.

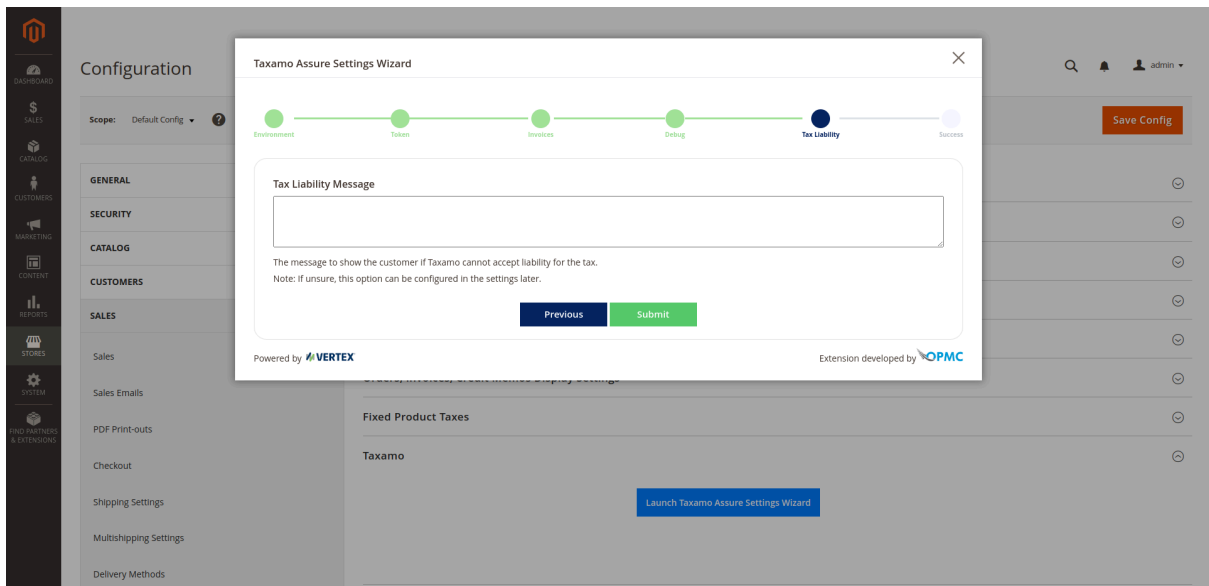
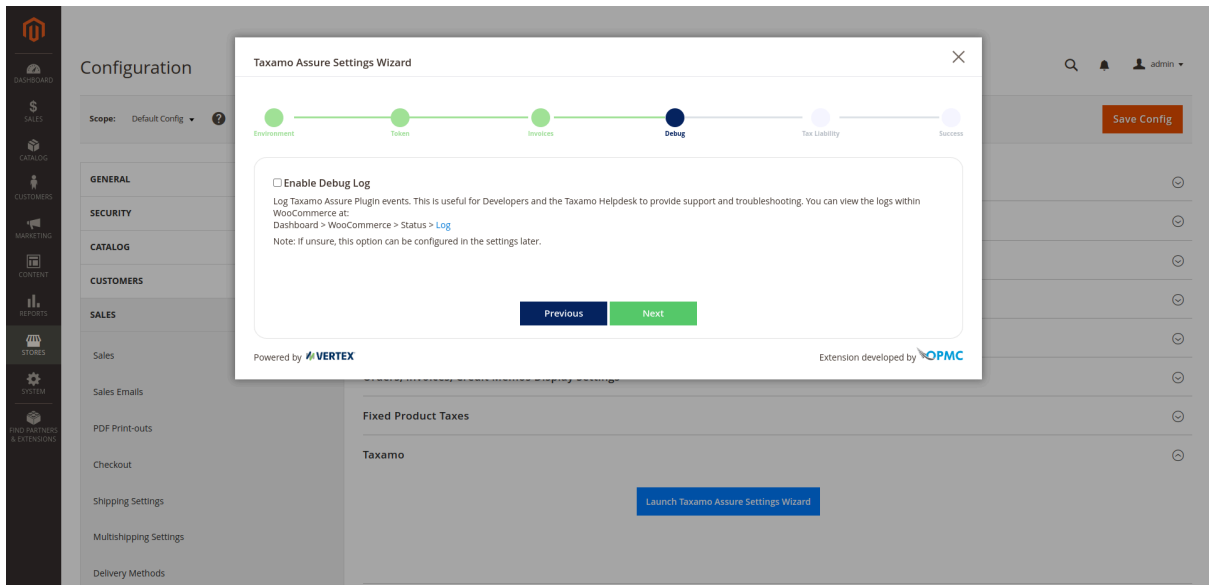
Click the Launch Taxamo Assure Settings Wizard button.

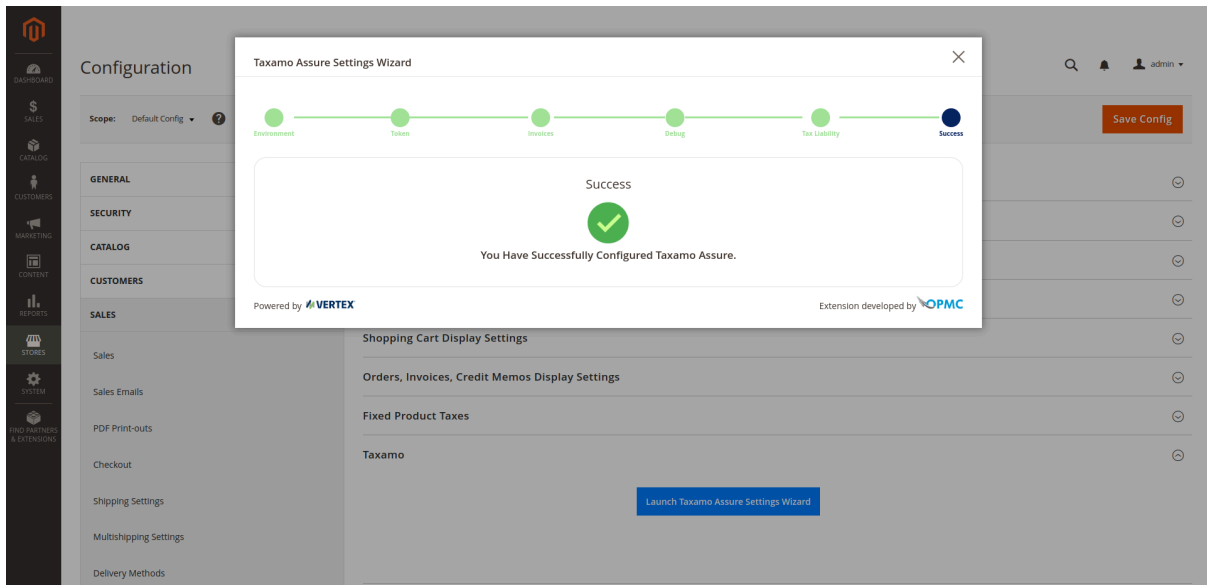


You will now be stepped through each Wizard screen.









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

Switch from Sandbox to Production

From the Adobe Commerce Dashboard navigate to: Stores > Configuration > Sales > Tax > Taxamo.

- Under Mode, select Production.
- Replace your Sandbox API Token with your Production API Token.
- Then click the "Save Config" button.

Note, the "Use system value" checkbox (on the right of the Mode setting) should remain unchecked.

Product Configuration

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

Product CN Codes

- This setting can be found in the Edit a Product area. ie. Dashboard > Catalog > Products > Select a Product > Taxamo. 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 Magento extension, from your Magento Dashboard go: Catalog > Products > Select a Product > Taxamo. Where a CN code is not provided, Taxamo will always calculate tax using the standard rate of tax for that jurisdiction.

Taxamo

Taxamo CN Code
[store view]

Customer Checkout

- Example of Taxamo VAT calculations on Checkout

LUMA Sign In

Shipping Review & Payments

Payment Method

Check / Money order

My billing and shipping address are the same

Test Test
1 Test Street
Paris, Paris 70123
France
[123456789](#)

Place Order

Order Summary

Cart Subtotal	\$50.00
Shipping Flat Rate - Fixed	\$5.00
Tax	\$11.00 <small>▼</small>
Order Total	\$66.00

1 Item in Cart ▼

Ship To: ✎

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 Magento Order. This can be passed electronically to your parcel carrier.

Order & Account Information	
Order # 000000021 (The order confirmation email is not sent)	
Order Date	Jun 9, 2024, 3:14:44 PM
Order Status	Processing
Purchased From	Main Website Main Website Store Default Store View
Placed from IP	
Account Information	
Customer Name	
Email	
Customer Group	NOT LOGGED IN
Address Information	
Billing Address Edit	Shipping Address Edit
Payment & Shipping Method	
Payment Information	Shipping & Handling Information
Check / Money order The order was placed using USD.	Flat Rate - Fixed \$5.00
Taxamo	
Taxamo Confirmed	Yes
Taxamo Liable	Yes
Transaction Key	
IOSS Number	

! 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.