Planet

VAT Refund Solutions
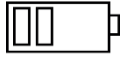
Standalone Terminal

User Guide

1.2

Introduction

Standalone Terminal allows merchants to issue Tax Free forms using Planet PAX A920 smart terminal with the possibility to also take advantage of payments processing functionalities that can be enabled to get an all-in-one solution for payments and Tax Free.

An important notice. Please ensure to keep your terminal always charged, as if battery is below 10% the terminal will temporarily lock out and its use will be prevented until charge will be restored to a percentage above 10%.

Contents

App start

The Tax Free app will be already installed on terminal provided by Planet.

- If your terminal is only enabled to use Tax Free service, your main application will be Tax Free.
- In case your terminal is an all-in-one device that combines payments and Tax Free, your main application will be the payment and you will have multiple ways to start the Tax Free process.

Automatically after an eligible sale

If your terminal is enabled to process payments with Planet, each time that a payment is executed, a check on country where the payment card has been issued will be performed, to identify all purchases that are also potentially eligible for Tax Free with the assumption that card's country matches with customer's country of residence.

In case the country results to be eligible for Tax Free shopping, the terminal will show an estimated refund amount and will offer to launch the Tax Free app to issue a form after payment is completed.

Before issuing a Tax Free form, please **always double check explicitly with customers their actual country of residence**, as it may also be different from the country retrieved from payment card that has been used.

Manually

It is otherwise always possible to launch the app manually. If your terminal is enabled to process payments with Planet, you can launch the Tax Free app pressing on **Standalone** button on the idle screen with Planet logo and then selecting **Planet Tax Free** from the menu.

You can always move back to the payment app pressing on the **Return to Payment** link available on Tax Free app in the login screen or in the main menu drawer on Home screen.

Switch to Tax Free app from payment | Switch to payment app from Tax Free
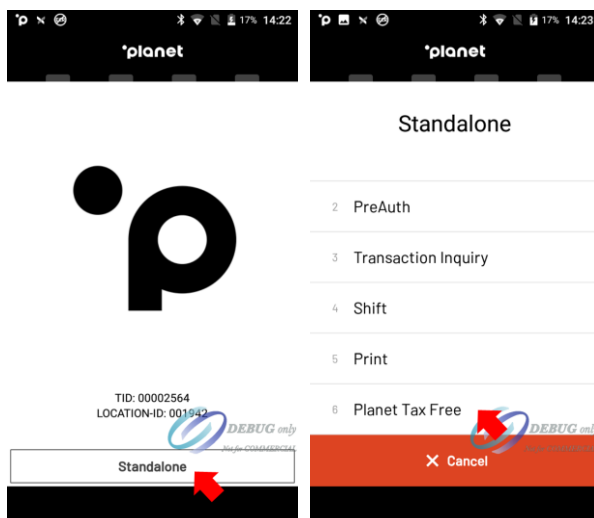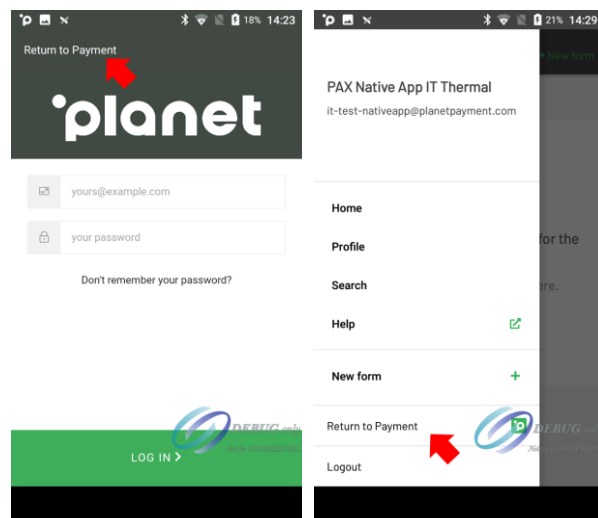
Login

Planet will provide you with credentials (username and password) to be used to access the application; most likely the username will match with your main store email address, while password will be generated by Planet. The email provided as username will also be used in case the password reset process is initiated.

After first access, you should be able to quickly access the app just tapping on the email address, without being asked to re-enter the password. It's anyway always possible to fully log out and access with another account with a tap on **Not your account?**

Issue a Tax Free form

Right after logging in, the new form issuing process is started. It's always possible to move back to the Home screen to get a summary of recent forms. From the Home screen, it's always possible to start issuing a form by clicking the **New form** button located on top-right corner of the screen.

The form issuing wizard guides you through issuing with a step-by-step process.

Step 1 – Purchase details: fill in information from purchase receipt.

Step 2 – Customer details: scan customer's travel document, search details on Planet database or enter manually customer's required details.

Step 3 – Refund details: choose method to obtain the Tax Free refund or skip to choose at a later stage, if allowed by country rules.

Step 4 – Signatures: collect customer and/or merchant signature.

Step 5 – Confirm and print the form: review, issue and print the form.

Step 1 – Purchase details

Based on refund methods that have been configured by Planet for your store, before starting the issuing process you may be asked to select if you want to issue a **Standard** (most common case), a **VAT Off** or **Tax Off** form.

- **Standard form** – sale is always with VAT, the refund will be paid by Planet after form will be issued: this is the traditional Tax Free journey.
- **VAT Off form** – sale is without VAT and the total amount to be paid is net only, with an eventual processing fee for Planet service.
- **Tax Off form** – sale is with VAT, but the refund amount is removed from the final amount to be paid by the customer.

If your store has been configured to only issue forms for one of the types mentioned above, you will not be asked to choose the type.

Simplified receipt entry method

If country regulation allows this, it will be possible to just enter the total amount of the sale for the specified VAT rate:

Product category

other (see receipt)	▼

VAT *	Sales amount *
7.7 % ▼	CHF

In case the receipt contains products with more than one VAT rate, it will be required to tick the checkbox below:

☐ Add products or VAT separately

and proceed with the detailed entry method described on the right.

Detailed receipt entry method

In some countries or always in case the receipt contains products with more than one VAT rate, this flow requires entry of some level of detail of purchased goods.

To proceed, tap on the **Add new item** button and then enter the following:
- product category
- product description
- serial number, if applicable
- VAT rate (%) – prefilled with default rate
- item quantity
- purchase amount

Actual mandatory fields on this screen change based on country regulation and are highlighted with a red asterisk *

You can group items of the same type even if they are listed with different lines on receipt.

💡 In case of VAT Off, it is possible to enter the amounts either including VAT or also **without VAT**, depending on which value is easier for you. Based on which field is filled in, the other value will be calculated.

You can add other receipts pressing on the **Add new receipt** button.

Based on receipts entered, a preview of the refund amount is being displayed at the bottom.

If country regulation allows to issue Tax Free forms without customer details and without selection of refund method, the app gives the possibility to immediately issue the form by pressing the button **Create form now**. In the other cases, or if you want to enter anyway customer and refund information, you can tap on **Continue** button.

Step 2 – Customer details

Customer details screen consists of three sections:
- **Basic details** – customer's country of residence, document information, first name and last; this set of information is always displayed, additional information may be requested depending on country regulation
- **Contact details** – customer's personal contact information
- **Address** – permanent address where the customer resides.

Mandatory fields on this screen vary country by country and are marked with a red asterisk *

There are three main ways to enter this information.

Scan travel document with camera

The terminal is equipped with a rear camera that can be used to scan customer's travel document to automatically populate fields. To use this functionality, tap on the **Scan travel document** button and scan document into the frame that is being displayed.

To improve readability, you can also activate the flash light located next to the camera lens with the button available at bottom-right corner of the screen.

Please note that the application can recognize travel documents with a **Machine-Readable Zone (MRZ)** of two or three lines compatible.

Machine Readable Zone (MRZ)

Search on Planet database

Retrieve details of customers that previously shop in your store or in any Planet's brands partner store by entering travel document number and clicking the **Search** button to proceed with the search. If a match is found fields will be pre-filled.

Manual entry

If search or scan is not an option, details can also be entered manually.

After having completed at least the fields marked as mandatory with a red asterisk * press on the **Continue** button to proceed to next step. If any validation fails, you will get notified.

⚠ Whether you scan, search or manually enter document details, always double check information accuracy to avoid possible problems while getting Customs validation.

Step 3 – Refund details

This screen allows to specify how the customer would like to receive the VAT refund.
It is possible to choose between three categories:

Credit card   Digital wallet   Cash

If country regulation allows it, it is also possible to scroll at the end of the screen and tap on **Skip** button to then have the possibility to select the refund method after form is issued, choosing at refund desk or specifying the choice on the form directly before posting it to Planet.
If the **Skip** button is not displayed, it is mandatory to select a refund method.

⚠ In case the issuing process was initiated choosing VAT Off or Tax Off, it will not be possible to skip this screen as the requirement to take advantage of these options is to provide a valid and eligible credit card as guarantee.

Credit card

The refund will be paid on credit the card provided by the customer either after or before validation, if merchant is allowed to offer this service. The first step is to tap on the **Read card details** button,

and then on the **IntegraTE Notification** banner that will appear on top of the screen: this will trigger the switch to Planet's payment app to read card details securely.

If card acquisition is successful, available refund options for that card will be displayed.
You can also eventually replace the card with another one with a tap on **Replace card** button, considering anyway that for any pre-validation refund method, the card provided must always be the same used for the payment of the purchase.
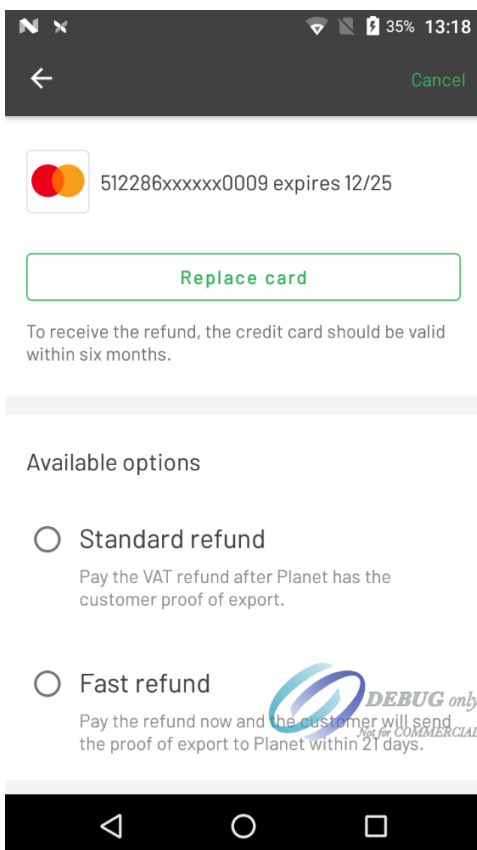
Standard refund

Planet will pay the refund amount directly on specified credit card after that Customs export validation stamp has been obtained and form is returned to Planet, according to country rules.

Fast Refund

Planet will pay the refund amount in advance within 72 hours after form creation, before that Customs export validation stamp has been obtained for the form.

This option is only available if you (as a merchant) have agreed activation of this service with Planet and the card provided is a credit card valid for at least 6 more months: no debit and prepaid cards are accepted.

Please note! If Fast refund is selected, inform the customer that the form must be returned to Planet with Customs export validation stamp within 21 days.
If form is not returned, Planet will debit the card for the refund amount that was previously paid in advance.

VAT Off and Tax Off

In case the issuing process was initiated choosing VAT Off or Tax Off, you will not be allowed to change method and you will be required to acquire a credit card as guarantee to continue. The card must be a credit card (no debit card and prepaid cards are accepted for this service) and should be valid for at least 6 more months.

Please note! In case of VAT Off or Tax Off, inform the customer that the form must be returned to Planet with Customs export validation stamp within 21 days.
If form is not returned, Planet will debit the card provided as guarantee for the amount that was removed from the final amount paid in store.

Digital wallet

The refund will be paid on the Alipay account specified by the customer and will be processed after that Customs export validation stamp has been obtained and form is returned to Planet, according to country rules.

Only mobile numbers are accepted (11 digits long and always starting with 1); if the user only has an email as Alipay account identifier, it won't be possible to use this service at this stage. The customer can eventually decide to get the refund on Alipay also at a Planet refund desk.

Cash

The refund will be paid in cash at a Planet refund desk or by a Planet authorized refund partner after that the customer presents the form with Customs export validation stamp.

Please note that a cash fee may be applied to the refund amount reported on the form.

Step 4 – Signatures

Based on country regulation, the terminal offers entry of merchant and customer signatures, to embed them in the form that will be printed. It is also possible to press the **Skip** button to leave the signatures blank: in this case, the paper form will have to be signed, if needed.

> In case on a pre-validation refund method was selected on the previous step, the customer will have to sign a mandatory declaration to proceed with form issuing to confirm acceptance of pre-validation refunds specific rules.
> The same declaration will then be printed on the form for later reference.

Step 5 – Confirm and print the form

This final confirmation screen shows the information filled in previous steps and gives the possibility to go back to each previous step to apply changes by pressing on the **Edit** button available in each section.

A tap on **Create form** button will trigger Tax Free form creation and if successful will then also initiate form printing.
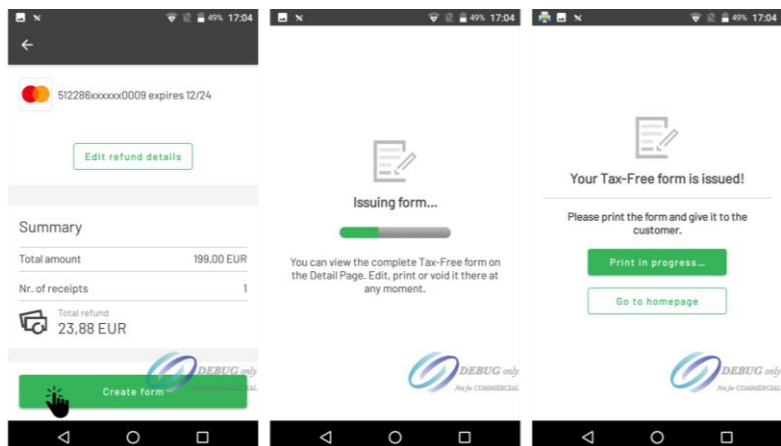
The app supports possibility to print on thermal paper rolls using the thermal printer embedded in the terminal or on A4 paper using an external wireless printer. Printing on thermal paper or A4 sheet is defined on configuration of your store, so in case you wish to change the format currently used by the app, please contact Planet support to have the change applied.

Print on thermal paper roll

In this case, there's no additional action required after pressing th Create form: if form issuing is successful, the print will be initiated automatically on embedded thermal printer. In case multiple copies are printed, a pause of few seconds between each of them will allow you to tear off.

Print on A4 sheet

If store configuration is set to print on A4, after successful form issuing, the Android print service screen will be launched, allowing to get a preview of document to be printed.

Printing on A4 wireless printer relies on Android print service. To be able to proceed, it is first required that printer manufacturer print plugin app is installed on your device by Planet and properly configured if needed.

Please note that at this moment Planet has made available on Planet internal store print plugins for HP, Brother, Canon, Epson, Xerox and Kyocera printers. If your printer is manufactured by a different brand, please inform Planet.

On this screen, you can select the printer to be used from the dropdown menu available on top of the screen and then press on the Print button to proceed sending the document to the printer. If the printer doesn't show up in the printers list, ensure that the following:

- printer is switched on;
- printer is connected to the same Wi-Fi network used by the terminal;
- printing plugin app from printer's manufacturer has been installed and configured on the terminal.
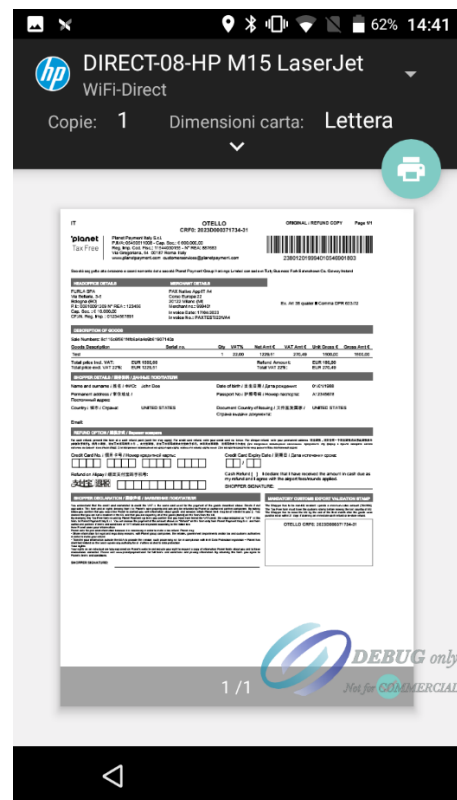
VAT Off and Tax Off

In case the issuing process was initiated choosing VAT Off or Tax Off, after form has been issued successfully, you will be offered to also complete the payment for the final amount of the sale calculated as follows:

- sale amount without VAT (net) plus Planet service fee in case of VAT Off;
- sale amount with VAT (gross) less refund amount in case of Tax Off.

In case the payment fails, you will be offered to retry the payment or cancel it – in this case, you will also be invited to also void the VAT Off or Tax Off issued form as well, as for these two specific refund methods the form without its linked payment cannot exist, as the refund is meant to be discounted directly from the payment.

See below the flow for a VAT Off or Tax Off successful payment after form is issued.
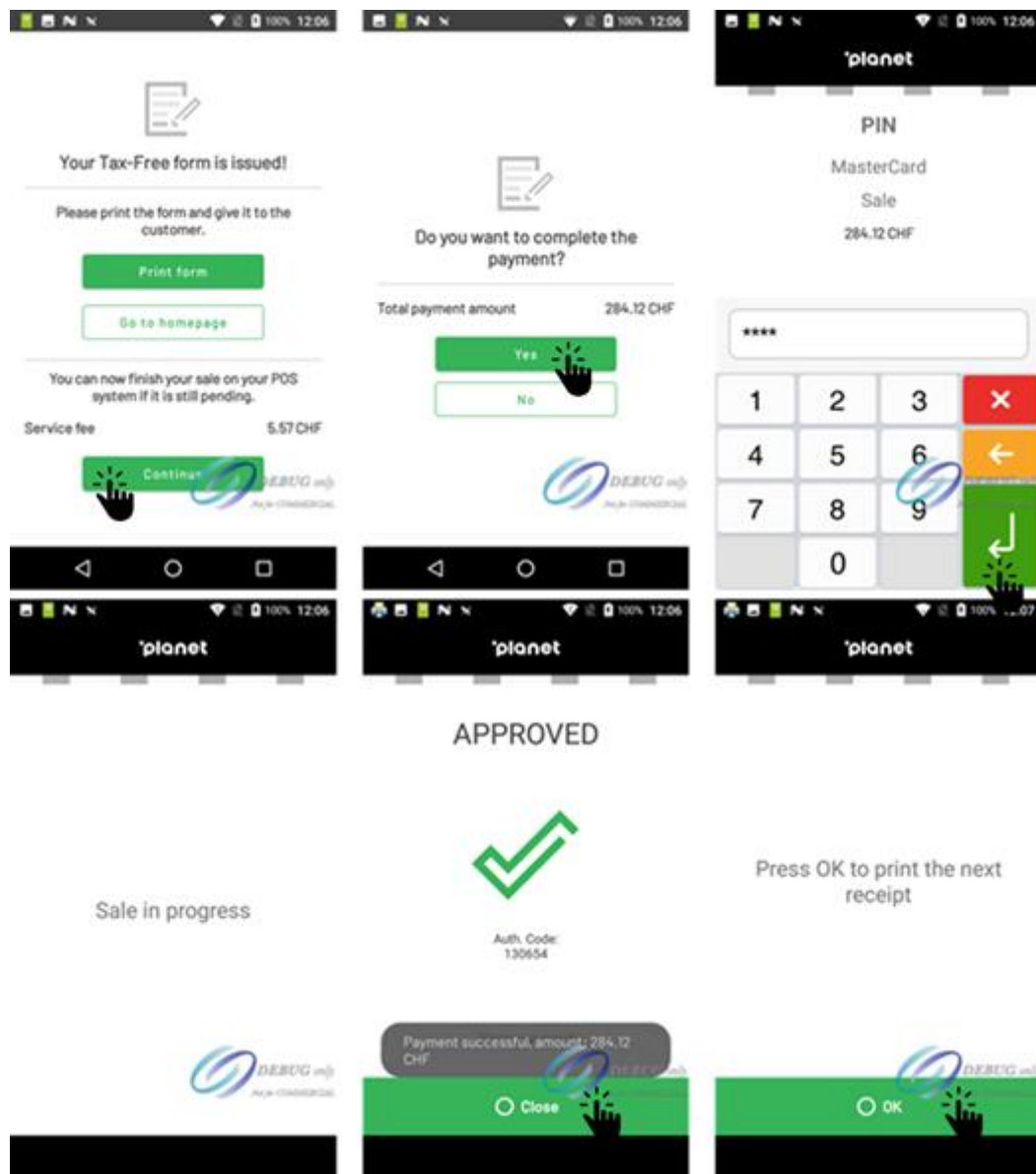
See below the flow for a VAT Off or Tax Off failed payment after form is issued. You can confirm if you want to retry the payment or cancel the Tax Free form.
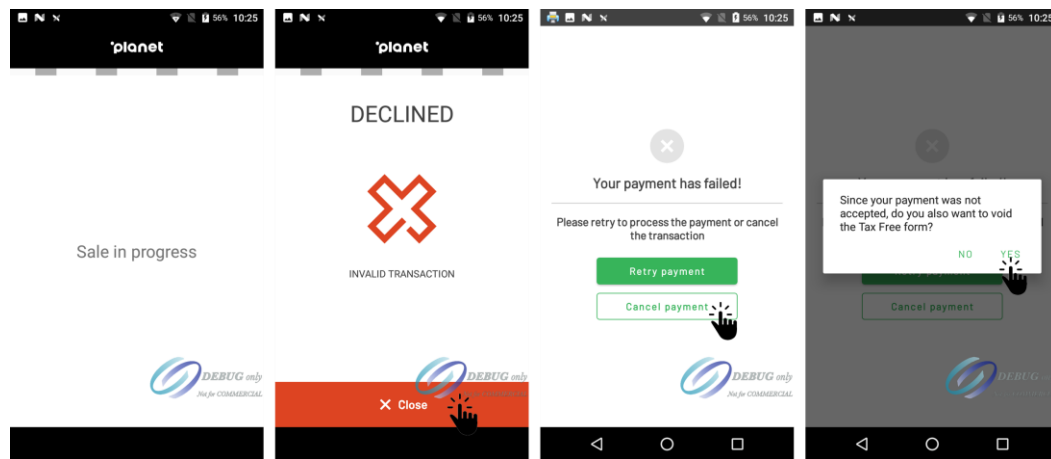

In all cases, at the end of the flow you will then be redirected to the Home screen.

Home screen

After issuing and printing a new form, you will be redirected to the Home screen that will give gives visibility of the last Tax Free form and activity from the past two days. In case an action is needed on forms issued earlier, you can refer to next paragraph.

The Home screen can also be accessed anytime with a tap on the drawer icon on top-left of the screen ☰ and selecting the **Home** entry.
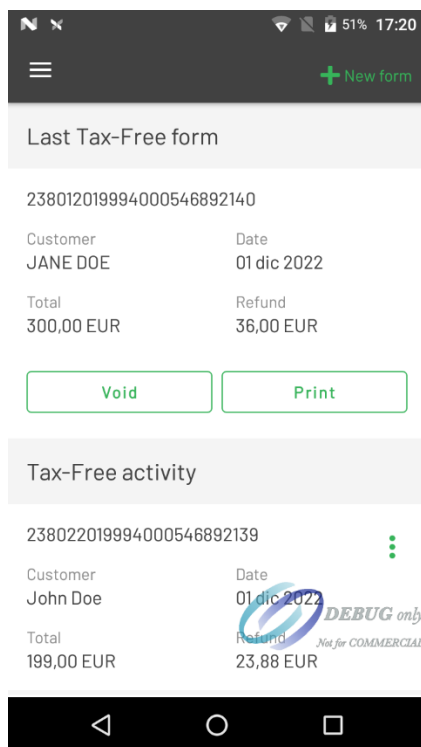
From this screen it is possible to proceed with void of the last Tax Free form issued pressing on **Void** button (e.g. in case goods are being returned before getting export validation and refund or in case of an error printed on the form).

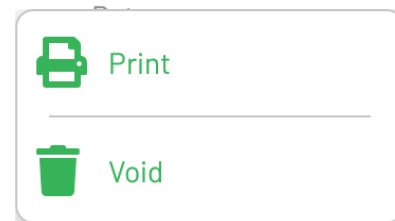It is also possible to reprint it pressing on **Print** button.

In the Tax Free activity section, all forms issued in the last two days will be displayed. Also for these forms, it is possible to void or reprint them with a tap on the options button ⋮ available on the right, next to each form.

From the menu you can then choose **Print** or **Void**.

Search, reprint or void issued forms

In case an action is needed on forms issued earlier, it is possible to search Tax Free forms issued earlier than last two days, already shown on the Home screen. To access this functionality, tap on the drawer icon on top-left of the screen ☰ and select **Search**.
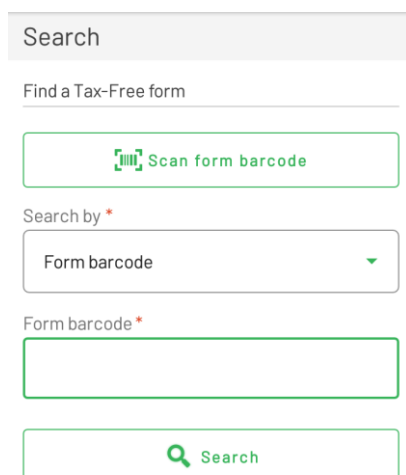
On this screen, you can use one of the available filters to search for the form on which the action is needed:

- form barcode number – in this case you can also rely on the **Scan form barcode** button to scan the barcode number using terminal's rear camera
- form date
- customer first or last name
- travel document number – in this case you can also rely on the **Scan travel document** button to scan the barcode number using terminal's rear camera
- customer nationality
- customer's country of residence.

After choosing the filter to use and entering the criteria, press the **Search** button.

The results will be displayed below the **Search** button, with possibility to void or reprint forms with a tap on the options button ⋮ available on the right, next to each form found.

From the menu you can then choose **Print** or **Void**.
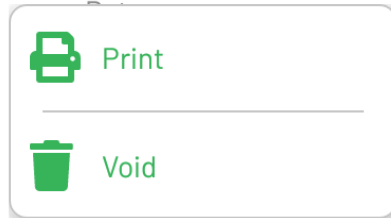
238022019994000546892139 ⋮

Customer	
John Doe	🖨 Print
Total	🗑 Void
199,00 EUR	

In case a form is voided in Italy, a fiscal document (Nota di Credito) will be printed. This document is a fiscal requirement in Italy and it's only intended to be stored by merchant, so please do not hold this document to the customer as it has no value.

⚠🖨 **Important note for reprints.** Please be aware that it is allowed to only reprint a form once. After this attempt, in case further reprints are still needed, you will need to contact local Planet support that will provide assistance.