Planet

VAT Refund Solutions

Standalone Web

User Guide

2.0

Introduction

Standalone Web enables merchants creating Tax Free forms with a quick setup and basically no IT effort: the only requirement is to have a device with Internet access and a cabled or wireless printer. This solution doesn't require installation of any app or component, as it's enough to connect to Planet website and access with credentials that will be provided.
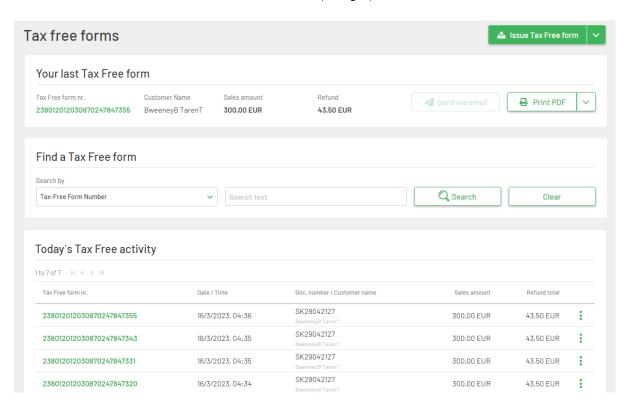
Contents

Login

Planet will provide you store credentials to access the application, that can be reached at this URL: https://europe-taxfree.planetpayment.com/PlanetWeb.

In case you forgot your password, you can request a password reset using the **Forgot password?** Link and entering the username provided by Planet. If you also lost your username, please get in touch with Planet support to retrieve the full set of credentials.

Home screen

After logging in, you will be redirected to the Home screen displayed in the figure below. Here you can find the latest forms issued and possibility to reprint or download the PDF.
All the possible ways to search previously issued forms to proceed with form reprinting or voiding are documented in **Search issued Tax Free forms** paragraph.

Issue a Tax Free form

The Tax Free form issuing wizard can be initiated by pressing the **Issue Tax-free form** button located on top-right corner of the Home screen.

The form issuing wizard will guide you through the following steps.

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 later, if allowed by country rules. In some countries this step may not be offered.

Step 4 – Confirmation and signature: review information in previous screens and collect customer signature if needed.

Step 5 – Get the form: preview and print the Tax Free form.

Step 1 – Purchase details

This screen allows to enter information about receipts that have to be included in the Tax Free form. The amount of information that needs to be entered depends on store's country regulation..

Simplified receipt entry method

If country regulation allows this, it will be possible to enter just basic information of the receipt – as an example: total amount of the sale for a specified VAT rate.

After having entered receipt's mandatory data (marked with asterisk), press on the **Add** button to include the line in the form.

In case the receipt contains products with more than one VAT rate, you can just enter multiple lines, using the same receipt number.

Please note that based on country regulation, when this simplified entry method is possible, it could be required to attach a copy of the sale receipt to the form in order to allow Customs to inspect detailed goods sold if needed.

Detailed receipt entry method

In countries where simplified receipt entry is not allowed, you will be required to enter details of goods that have been sold.

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

To proceed, tap on the **Add receipt manually** button and then enter the following:
- receipt number and date
- product description
- serial number, if applicable
- product category
- VAT rate (%) – prefilled with default
- quantity
- product total amount (for two items, enter the total and not the unit price)

You can add more products for the same receipts pressing the **Add product** button. You can also add another receipt pressing the Add new receipt button.

When you entered all the items, press **Save**.

On the right side of the screen (or at the bottom if screen size is limited), a summary panel is presented with the total sale amount, the number of receipts entered and an estimated refund

amount that the customer will receive by Planet for this form. Please note this is an estimated value and may be different when paid depending on refund method that will be selected.

 ## Step 2 – Customer details

The Customer details step consists in three sections:

- **Basic details** – fields related with shopper's personal information and country of residence and travel document details
- **Contact details** – shoppers' personal contact information
- **Address** – fields related with customers' address

The fields that are mandatory to fill in will be highlighted with a red asterisk *; this depends on country Tax Free regulation and eventually on specific store configuration.

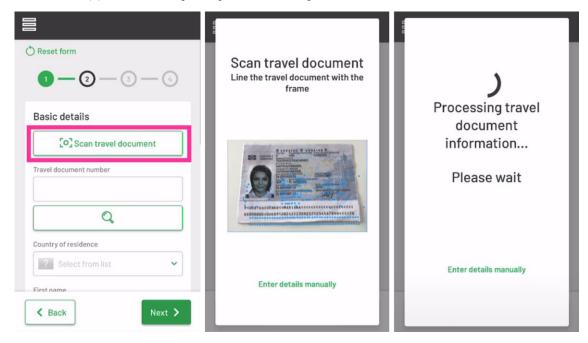To fill in details on this screen, multiple ways are offered.

 Whether you scan, search or manually enter document details, **always double check data accuracy to avoid possible problems while getting Customs validation.**
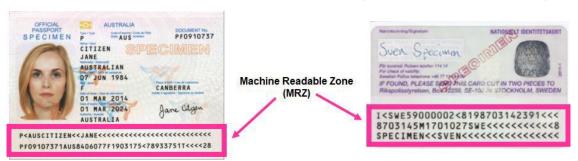
 ### Scan travel document with camera

If application is running on a mobile device with a camera (ideally tablets or smartphones), a button will appear to allow getting details through a scan of the travel document.

The application allows to read documents with a **Machine-Readable Zone (MRZ)** of two or three lines, that are typically passports and identity cards (where regulation allows them):

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 button highlighted below to proceed with the search. If a match is found, fields will be pre-filled.

Travel document number		Country of residence
A12345678	🔍	🇺🇸 UNITED STATES ⌄

First name	Last name	Nationality
JOHN	DOE	🇺🇸 AMERICAN US ⌄

If a match is not found for provided document number, a message will appear to invite entering information manually (or through document scan using the camera).

Manual entry

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

Step 3 – Refund details

This screen allows to specify how the customer would like to receive the VAT refund.

ⓘ Please note that in some countries this step may not be displayed.

It is possible to choose between three categories:

Credit card	Alipay	Cash

If country regulation allows it, it is also possible to choose the additional entry **Select Later** 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 **Select Later** entry is not displayed, it is mandatory to select a refund method.

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 and a valid card is provided.

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.

Prepaid refund (credit guarantee required)

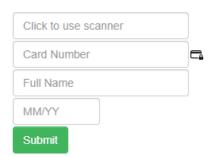ⓘ This option will only be offered if you agreed service activation with Planet

Planet will pay the refund amount in advance within 72 hours from Tax Free form issuance, before that Customs export validation stamp is obtained for the form. 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 Prepaid 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.

After selecting the type of service, you will be required to enter card details.

If you have a card/passport reader provided by Planet (e.g. DESKO IDenty chrom), click on the **Click to use scanner** field and then pass the card in the reader. If card is read properly, data will be filled in automatically.

If you are not equipped with card reader, you can enter manually card number and expiration date in the dedicated fields; full name is always optional.

After entering details press on **Submit** button to save them.

You can also eventually replace acquired card with another one with a tap on **Replace card** button, considering anyway that for any prepaid refund method, the card provided must always be the same used for the payment of the purchase.

Alipay

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.

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 that will be reported on the form.

Step 4 – Confirmation and signature

The Confirm step shows the summary of the information filled in the previous steps, as well as the total refund value that the customer will receive. If any information needs to be amended, it is possible to go back to related section using the **Edit * details** links.

The last section of this screen allows to embed also customer's signature with mouse or directly with the finger if application is running on a touch-screen equipped device.

Step 5 – Get the form

By clicking on **Finish Form** button, if all information is processed correctly, the Tax Free form will be issued and you will be redirected to the final screen, where the following options are displayed:

- **Tax-free form number** – clicking on the form number you will be redirected to the detailed screen of the form that have just been issued
- **Print form** – clicking on it, a separate browser's tab will be opened with the PDF preview of the form just issued to then proceed with the print
- **Go to Homepage** – clicking on it will be redirect to the Home screen.

Search issued Tax Free forms

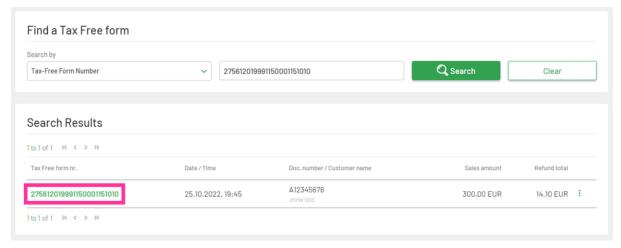From the Home screen, it is possible to search for a specific form using the following filters:

- Customer name
- Travel document number
- Receipt number
- Tax Free form number
- Issuing date (specific date)
- Issuing date (number of past days)

Find a Tax Free form

Search by

| Customer Name ▾ | Search text | 🔍 Search | Clear |

Customer Name
Travel document number
Receipt number
Tax-Free Form Number
Issuing date (specific date)
Issuing date (number of past days)

For each record, several actions are possible by clicking on the three dots icon ⋮ .
If you select **View details** in the list of possible actions, a detailed view of the issued form is rendered where the information regarding the purchase and the customer is summarized, together with the refund amount.
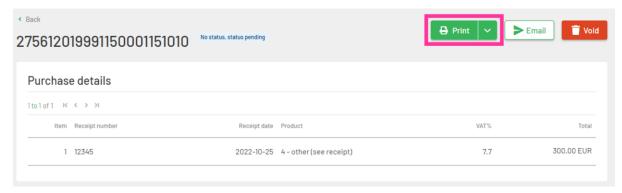
Reprint a Tax Free form

On the Home screen, first identify the form to be reprinted clicking on its number from recent forms or through the **Find a Tax Free form** section using one of the filters available.

Find a Tax Free form

Search by

| Tax-Free Form Number ▾ | 2756120199911500001151010 | 🔍 Search | Clear |

Search Results

1 to 1 of 1 |< < > >|

Tax Free form nr.	Date / Time	Doc. number / Customer name	Sales amount	Refund total
2756120199911500001151010	25.10.2022, 19:45	A12345678 JOHN DOE	300.00 EUR	14.10 EUR ⋮

1 to 1 of 1 |< < > >|

After clicking on form number, you will be moved to forms details, where a **Print** button is available. Clicking on it, a separate browser's tab will be opened with the PDF preview of the form just issued to then proceed with the print.
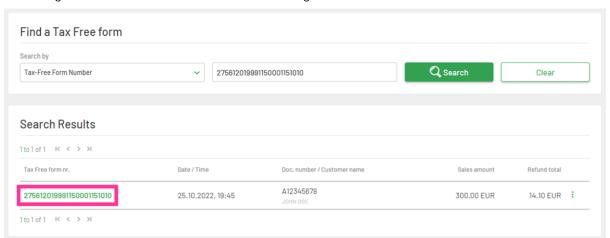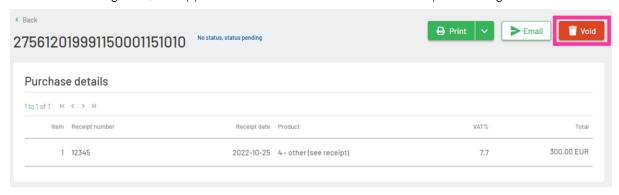
Please note that it's possible to reprint the form multiple times until the form is in application cache. After that, the copy to be reprinted will be pulled from Planet back-end and this is only possible once. In this case, to proceed with the reprint you will need first to contact Planet support.

Void a Tax Free form

On the Home screen, first identify the form to be reprinted clicking on its number from recent forms or through the **Find a Tax Free form** section using one of the filters available.

After clicking on form number, you will be moved to forms details, where a red **Void** button is available. Clicking on it, the application will ask a confirmation before proceeding.

If the store is located in Italy, after a successful void a Credit Note fiscal document will be generated, according to country regulation. This document is only meant to be printed and stored by merchant and must not be provided to the shopper.