

Tax Calculator User Manual

1.0 General Options

The Tax Calculator Options window can be opened from the Start menu of Microsoft Windows by selecting Start> All Programs> Sales Tax Calculator> General Options. This option will only display if the Tax Calculator has been installed on the workstation.

The Tax Calculator Options window is used to select how the Tax Calculator will access the sales tax and address information, and to purge old sales tax rates.

General Tab

- **Connection Type** – The Connection Type drop down menu is used to select how the Tax Rate Calculator will access the database that contains the tax rates and addresses.
 - Web-Connected – Web connected mode is the most common way to use the Sales Tax Calculator. If the web connected product was purchased, then your connection type will default to “Web-Connected” and you will not be able to change it. The **Server** and **Database Name** fields will also be disabled.
 - Local – Select Local to use the local database that was loaded onto your computer during the installation process. This database is located in the Snowcap Tax Calculator folder.
 - Remote SQL Server – Select Remote SQL Server if you would like the Tax Rate Calculator to connect to a remote SQL Server database (for example, if you have a network and would like all network users to access a single SQL Server database).
- The **Server** and **Database Name** fields are used to enter the remote SQL server information. If Local or Web-Connected is selected in the **Connection Type** drop down menu, you can ignore these fields.
 - **Server** – Enter the name of the database server.
 - **Database Name** – Enter the name of the database.
- Test Connection – The Test Connection button is used to test the connection to the remote SQL server entered into the **Server** and **Database Name** fields.
 - The Test Connection button is only enabled when using a remote SQL server connection. If you are using a web-connected or local connection (Local or Web-Connected is specified in the **Connection Type** drop down menu), you do not have to test the connection.
 - An information window will open once the test is complete. If the test connection failed, the information window will display an error message.

- **Authorization Code** – This code is required for the software to function correctly. Your authorization code was provided to you at time of payment and was entered during the software setup process.
- **Zip Lookup** – The Zip Lookup field is used to select how the tax rates will be retrieved from the database. The selection in this field determines which fields will display on the Tax Code Calculator window. If Web-Connected is selected in the **Connection Type** drop down menu then the Zip Lookup field will be disabled.
 - Select Search by Zip Code if you would like to retrieve the sales tax rates from the database using the zip code. For example, if you have the entire shipping address of the customer, you would select this option. This is the recommended way of locating the tax rates because it is the fastest. This option will add a zip code field to the Tax Code Calculator window.
 - Select Search by City Name if you would like to retrieve sales tax rates from the database using the city name. For example, if you deliver to customers but do not necessarily know their zip codes. This is a slower method of retrieving the tax rates. This option will add a City field to the Tax Code Calculator window instead of a zip code field.

Tools Tab

The Tools tab controls which sales tax rates are stored in the database. The Rate Updates section displays information on how to order a CD that contains quarterly updated sales tax rates. The Purge Old Rates section is used to remove old sales tax rates from your database.

- **Rate Updates** – The Rate Updates section displays how to order a CD that contains the quarterly updated sales tax rates. Once you receive the CD, you can install the new rates on your workstation by inserting the CD and running the automatic installation program. If Web-Connected is selected in the **Connection Type** drop down menu then your rate updates are automatically handled by Snowcap.
- **Purge Old Rates** – The Purge Old Rates section is used to remove the tax rates of a previous quarter from your database. Enter a date in the Purge Before field and click the Purge Now button to remove all sales tax rates with an end date prior to the purge date from the database. This option will be disabled if Web-Connected is selected in the **Connection Type** drop down menu.
 - Once you have completed the billings for a quarter, manually purge the tax rates of that quarter from the database using this option. This keeps the Tax Rate Calculator running at optimal performance.

- When new tax rates are loaded onto your database, the rates are loaded with a begin date and an end date. All rates with an end date prior to the date entered in the Purge Before field will be erased from the database. For example, if all billings between January 2008 and March 2008 have been invoiced, enter March 31 in the Purge Before field. All sales tax rates with an end date equal to or prior to March 31 will be removed from the database.
- The Purge Old Rates feature is a manual process so that if you get behind in a billing, the tax rates from the previous quarter will stay in the database until they are removed.