

Tax Calculator Startup Guide

1. QuickBooks Plug-in Installation

- 1.0 To install the QuickBooks Plugin you need to run the setup file that you downloaded from our website. Follow the setup instructions and the wizard will guide you through the setup process. If you purchased the product make sure to change the authorization code from "DEMO" to your actual authorization code.
- 1.1 After successfully running the setup wizard you will need to start your QuickBooks application.
- 1.2 After your QuickBooks application has started, go to your start menu and find the newly added "Sales Tax Calculator" menu option. One of your choices on this menu will be "QuickBooks Setup". Click on the QuickBooks Setup menu item.
- 1.3 Immediately after opening the QuickBooks Setup window you will be prompted with a special pop-up window from the QuickBooks application. This window will ask you to grant permission for the Sales Tax Calculator to access your QuickBooks database file. You MUST grant access in order for the Sales Tax Calculator to work correctly.
- 1.4 After granting access to the QuickBooks database, you simply need to select a Tax Agency Vendor. You will be prompted to choose a Vendor that already exists in your QuickBooks database. The Vendor selected will be used as the Tax Agency vendor on any new Sales Tax Items that are created by the Sales Tax Calculator.
- 1.5 After selecting your Tax Agency Vendor, evaluate the appropriate settings and press the button labeled "Save". You must press this button in order for the Sales Tax Calculator menu option and/or data save events to be added to QuickBooks. After the update is complete, you will receive a message that QuickBooks must be restarted before the changes can be made.
- 1.6 Restart QuickBooks.
- 1.7 Create a new invoice or open an existing invoice (or sales receipt – based on settings). When changes occur on the invoice, the tax calculator will automatically check to see if the sales tax code needs to be changed. You will be prompted if the calculated tax code is different than the current tax code. Alternatively, you can click on the "Customers" menus and you will see a new option labeled "Sales Tax Calculator: Calculate Sales Tax". Click on the menu item to manually calculate the sales tax for an existing (saved) invoice.
- 1.8 The Sales Tax Calculator will automatically calculate the correct tax code and add it to your invoice. If you are using a DEMO product, the sales tax calculator will always return the same tax code.
- 1.9 You're all done! For more detailed product instructions please see the user manuals available on our website or contact us on our support forum.

Notes

- Menu options are not available in Windows Vista.
- Multi-User access is slightly different – see the user manual for more information