

# Tax Calculator User Manual

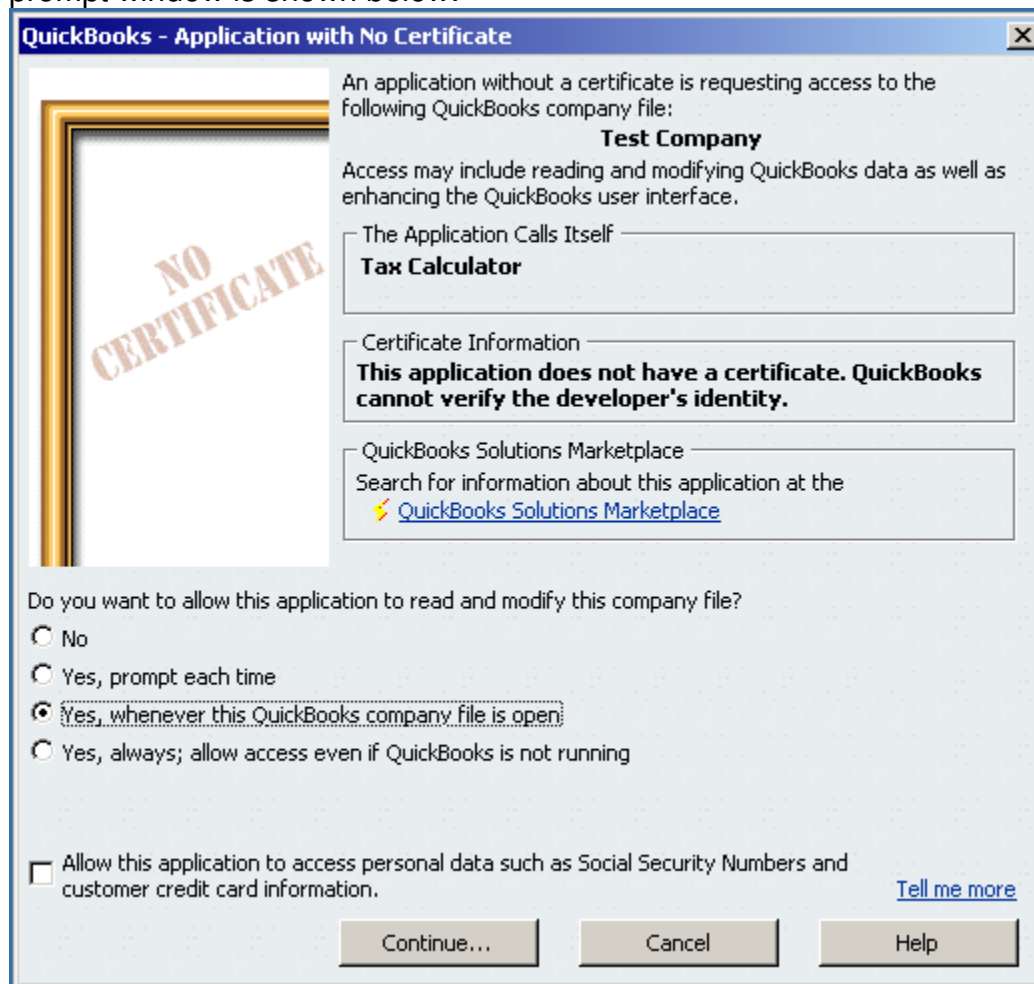
## 1. QuickBooks Plug-in Setup

The QuickBooks Plug-in Setup window is used to configure the QuickBooks Plug-in for use with QuickBooks. The Setup program is used to select a QuickBooks Sales Tax Vendor, provide one-time QuickBooks integration (via the Save button), and to select and additional configuration options.

The QuickBooks Plug-in Setup window can be opened from the Microsoft Windows Start menu by selecting Start> All Programs> Sales Tax Calculator> QuickBooks Setup.

**QuickBooks must be running in order to run the QuickBooks Plug-in Setup window.**

Upon running the Setup window for the first time, you will be immediately be prompted by QuickBooks – this is your QuickBooks database asking for your permission to allow the Sales Tax Calculator to access your database. You **must** grant permission in order for the Sales Tax Calculator to interface correctly with QuickBooks. An example of the QuickBooks security prompt window is shown below:



## Using the Setup Window

The setup window performs three basic setup functions, listed below:

- **Tax Agency Vendor** – The Tax Agency Vendor drop-down is used to select the Tax Agency that will be used on any new Sales Tax Items that are created by the calculator inside of your QuickBooks database. You must select a Tax Agency Vendor because this is a QuickBooks requirement for creating any new Sales Tax Items.
- **Update Tax Code** (*Data Save/Menu Option/Both*) – Select whether or not the tax code should be updated automatically when the user saves the invoice, or manually by the menu option on a saved invoice only, or use both options (menu selections are not available in Windows Vista).
- **Calculate Taxes** (*Invoices/Sales Receipts/Both*) – Select the appropriate items to use the Sales Tax Calculator on.
- **Support Multi-User QuickBooks Company File** – If you use QuickBooks in Multi-User mode, you will want this selected. Special multi-user functionality is explained below.
- **Save** –After selecting your setup options, press the Save button to save your changes. During the save process, the application will also register itself with the Quickbooks company file so the Sales Tax Calculator will work correctly. You will be prompted by one or more messages during the save process indicating that the application was able to successfully register itself.

## 2. Using the QuickBooks Plug-in

After running the QuickBooks Plug-in Setup window for the first time you will see a new menu option under the standard QuickBooks “Customer” menu. The menu option will be displayed as “Tax Calculator: Calculate Sales Tax” and will probably be the last item displayed in the customer menu. There are two ways to use the Sales Tax Calculator:

1. Using the menu. To use the Sales Tax Calculator via the menu, you simply need to open an existing (saved) invoice and click on the new Calculate Sales Tax option on the customer menu. The system will automatically calculate the correct sales tax code and add it to the invoice for you. If necessary, the Sales Tax Calculator will automatically add a new Sales Tax Item to your QuickBooks database. If the Invoice on your tax code needs to be changed, the system will prompt you with a small message indicating the new tax code and rate that will be applied to the invoice. You will have 5 seconds to either accept or reject the change. If you do not accept the change within 5 seconds, the new tax code will be automatically applied to your invoice.
2. Using the “Data Save” feature. By default, the system is configured to automatically attempt to calculate sales tax whenever an invoice is saved. This functionality works automatically on new invoices or sales receipts (based on your settings), or whenever Quickbooks detects that an invoice/sales receipt has changed. If the tax code needs to be changed, the system will prompt you with a small message indicating the new tax code and rate that will be applied to the invoice. You will have 5 seconds to either accept or reject the change. If you do not accept the change within 5 seconds, the new tax code will be automatically applied to your invoice.

### Important Notes:

- When using the menu option, you must have a *saved* invoice open in the invoice edit window before the system will be able to correctly calculate the sales tax.
- Your QuickBooks database must be configured to calculate sales tax. This is an option that is set in your QuickBooks preferences window. If your QuickBooks database is not configured to calculate sales tax then you will still see the Calculate Sales Tax menu option under the Customer menu, but the option will be disabled and will appear as grey text.
- The Shipping address on the invoice must be entered to the best of your ability. The Sales Tax Calculator works by finding the tax code associated with the Shipping address, so the shipping address must be present in order for the system to work correctly.
- Multi-User mode: QuickBooks does not allow updating the tax rate on the tax items when in multi-user mode. This means that if using QuickBooks in multi-user mode, at most once per quarter – the company file will need to be opened in single-user mode in order to allow the Sales Tax Calculator to automatically update your tax items with the updated tax rates. You will be prompted to do so, and guided by messages during this short update. As outdated tax codes are encountered, the system will warn you that updated tax rates have been found and that it cannot occur automatically while in multi-user mode. Simply using the “Switch to single-user” menu option in QuickBooks will allow all existing tax codes used by the Sales Tax Calculator to be automatically updated.