

Tax Calculator User Manual

1. Microsoft Small Business Accounting Plugin Options

The Microsoft Small Business Accounting (SBA) Plugin Setup window is used to configure the SBA Plugin for use with Microsoft Small Business Accounting. The setup program only needs to be run once. The Setup program is used to select a Sales Tax Vendor from your Microsoft company file.

The QuickBooks Plugin Setup window can be opened from inside the SBA application. Simply open the invoice entry window and find the new menu option titled “Sales Tax Calculator”. Choose the menu called “Options” to open the Options window.

Using the Options Window

The setup window allows you to configure the SBA Plugin before it is used. Currently, there is only one setup option, listed below.

- **Tax Agency** – The Tax Agency drop-down is used to select the Tax Agency that will be used on any new Sales Tax Codes that are created by the calculator inside of your SBA database. You must select a Tax Agency because this is an SBA requirement for creating any new Sales Tax Codes.

2. Using the SBA Plugin

After running the SBA Plugin Options window you are ready to start using the SBA Plugin. To use the SBA Plugin simply open or create an invoice and click on the “Sales Tax Calculator” menu option. Under the Sales Tax Calculator menu you will see two options, one allows you to calculate sales tax based on the Shipping address (the most common option) and the other allows you to calculate sales tax based on the billing address. Once you choose to calculate sales tax the system will automatically determine the correct tax code and add the code to your database (if necessary).

- The Shipping or Billing 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 address, so an address must be present in order for the system to work correctly.
- There are times when the Sales Tax Calculator will need to alert you to with messages or problems encountered (such as an address not being able to be found in the tax code database). These messages will be displayed as pop-up windows.