



**EXACTOR MILLENNIUM POS
SALES TAX COMPLIANCE
PLUG-IN:
INSTALLATION & USER GUIDE**

**(MAY 2013)
CONFIDENTIAL**

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EXACTOR MILLENNIUM POS SYSTEM OVERVIEW

This **Exactor Millennium POS Plug-in** was developed to enable businesses to incorporate tax calculations from within their Millennium POS sales receipts. The **Exactor Millennium POS Plug-in** will redefine the taxes for the internal Millennium predefined product types (buckets) by providing EUCs for these categories, automatically and seamlessly updating the tax and because the **Exactor Millennium POS Plug-in** syncs with the **Exactor System** automatically, tax returns are generated without the merchant having to transfer data from one system to another.

INSTALLING THE EXACTOR MILLENNIUM PLUG-IN

The user must start by downloading the **Exactor Millennium POS Plug-in**.

- On the **Exactor Merchant Module Website**, navigate to
 - Account Management
 - Integration Points and Plug-Ins
- Under "Financial Applications", locate "Millennium POS" and download the **Exactor Millennium POS Plug-in** file and save to the computer.
 - Make sure to note where on the computer the file is saved.

After downloading the **Exactor Millennium POS Plug-in**, and before activating the installer, please shut down all programs and make sure that a Millennium POS file is **NOT** running.

- Navigate to where the **Exactor Millennium POS Plug-in** file was saved.
- Double click on the **Exactor Millennium POS Plug-in** file or icon.

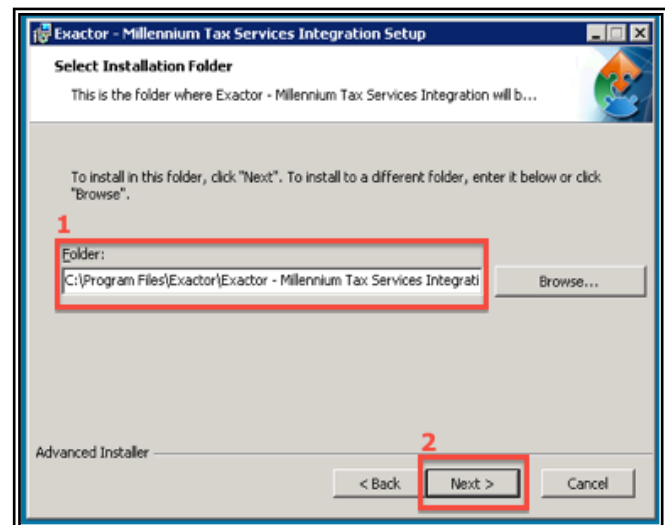
The zipped file extracts the files necessary for installing the **Exactor Millennium POS Plug-in**.

Once the installation files are extracted and unzipped, the user is welcomed to the Millennium Plug-in Setup wizard.

The user is asked where to install the **Exactor Millennium POS Plug-in** files. The installation wizard defaults to the "Program Files\Exactor\Exactor - Millennium Tax Services Integration\" directory (1), and automatically creates this directory. The user may change the directory if they wish, but it is recommended to always use the default options whenever possible.

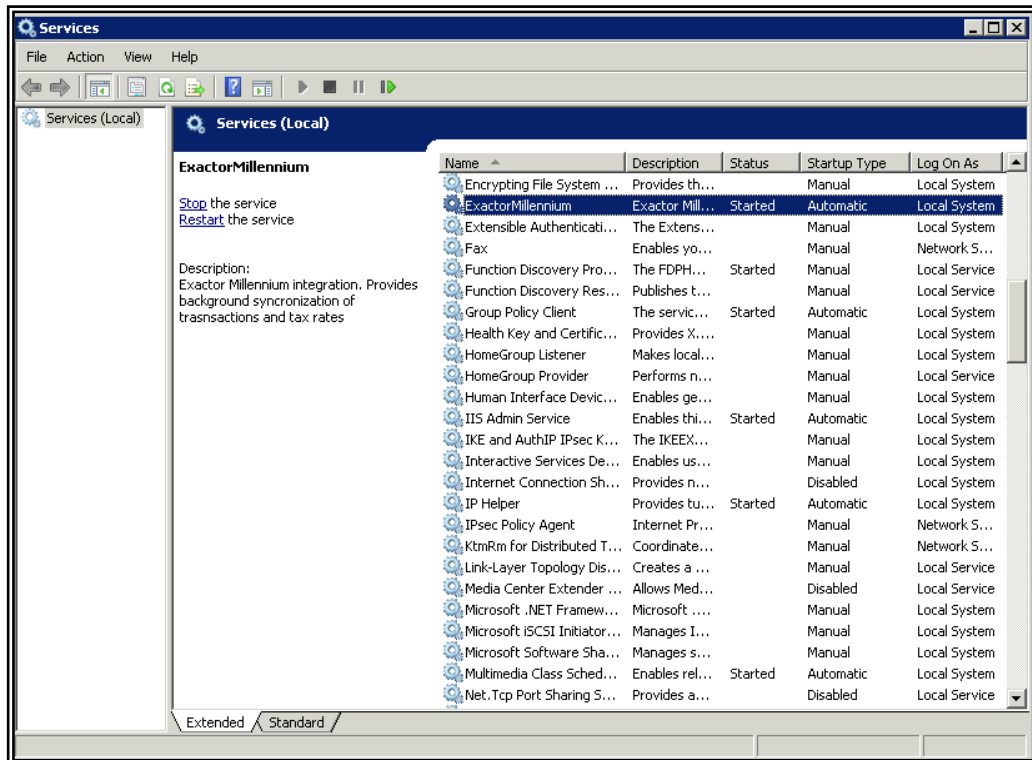
- Click "Next" (2) to proceed to the next phase.

Note: The plugin requires Java Runtime 1.5+ (www.java.com). If it has not been installed, the installation will attempt to guide you through the JRE installation.



PLUGIN AS A SERVICE:

The Millennium plugin will only need to be installed on one centralized server. Please install on the same machine as the Millennium server. Once installed, a windows service will be created and should be set to run automatically.



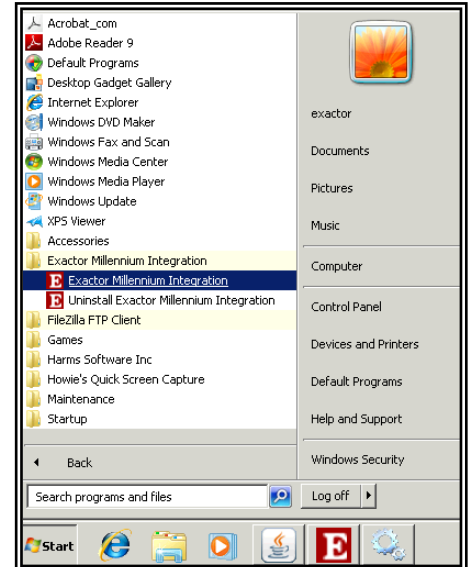
SETTING UP EXACTOR IN MILLENNIUM POS

Once the **Exactor Millennium POS Plug-in** is installed, the user must set up their **Exactor Merchant Account** information within the **Exactor Millennium POS Plug-in**. This set-up is necessary to make sure that the Millennium POS communicates correctly and accurately with the **Exactor System**, to calculate and store transaction information.

To setup the **Exactor Merchant Account** the user must navigate to:

→ The **Exactor** icon on the desktop or start->All program files->Exactor Millennium Integration

→ Double click "Exactor Millennium Integration"



The **Exactor** Account Settings will open in a new window; the user must complete the following information:

- **Account #:** The user must enter their **Exactor Merchant Account** Number. This is the account number assigned by **Exactor** when an **Exactor** account is created. This information must be inserted exactly as received from **Exactor**.
- **User Name:** The user must insert their user name and must be inserted exactly as received from **Exactor**. *User name* is case sensitive.
- **Business Address:** **Exactor** uses this information for determining taxes on transactions; the user must provide the Business Address

A screenshot of the 'Exactor Millennium Integration' window. The window title is 'Exactor Millennium Integration' and the version is '20121120'. The form contains the following fields:

- Account #: 10001030
- User Name: (empty)
- Business Address: Full name, Street 1, Street 2, City, County, Postal code, State (dropdown menu showing 'AL')
- Millennium Settings: DB Location (with browse button), Effective Start Date (Dec 1, 2012)
- Product Mapping: File location (with browse button)

Buttons for 'Save' and 'Cancel' are at the bottom right.

information if the *Business Address* fields have not been pre-populated from the Millennium POS system.

- **DB Location:** This field should display the full path to the folder with Millennium database.
- **Effective Start Date:** The user should enter the date that **Exactor** will begin tax calculations on transactions. Transactions created in Millennium after this date will be transferred to Exactor.
- **Product Mapping:** The plugin has the ability to product map your products/services/etc into different EUC's for more accurate tax calculation. This is done via a product mapping file. By default, the plugin can run without specifying the product mapping file. Please contact support for more information.

After the user inputs the required **Exactor** Account information, click "Save".

*Note: Unless there is an exact match between the "Account #" and "User Name" Millennium is not able to communicate with the **Exactor System**.*

Congratulations, the **Exactor System** for tax calculation is setup for Millennium POS transactions.

USING EXACTOR WITHIN MILLENNIUM POS

Once the **Exactor Millennium POS Plug-in** is installed and set up, the user is ready to use Millennium POS, allowing the **Exactor System** to handle sales tax calculations.

Once an appointment has been created and the services have been performed, the user can process the services and/or sales transaction by right clicking on the appointment to open the Millennium POS transaction.

- The user should proceed to fill out the transaction as they normally would and will continue to have the capability to:
 - enter additional line items for services performed or products sold.
 - sell memberships
 - apply discounts



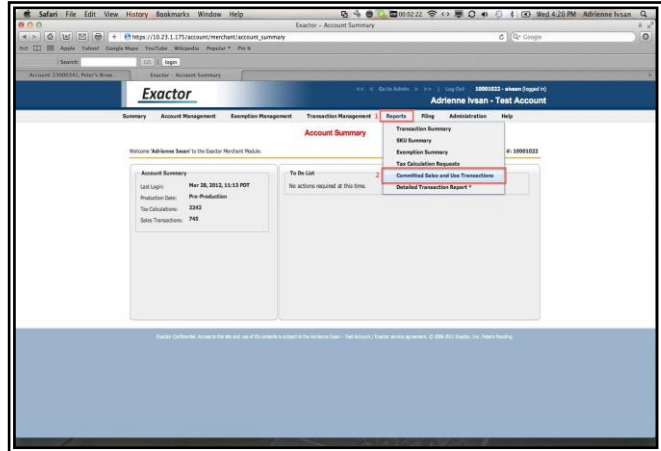
- To finalize the transaction the user should click "Sale" (1) and enter the payment method and click "OK" (2).



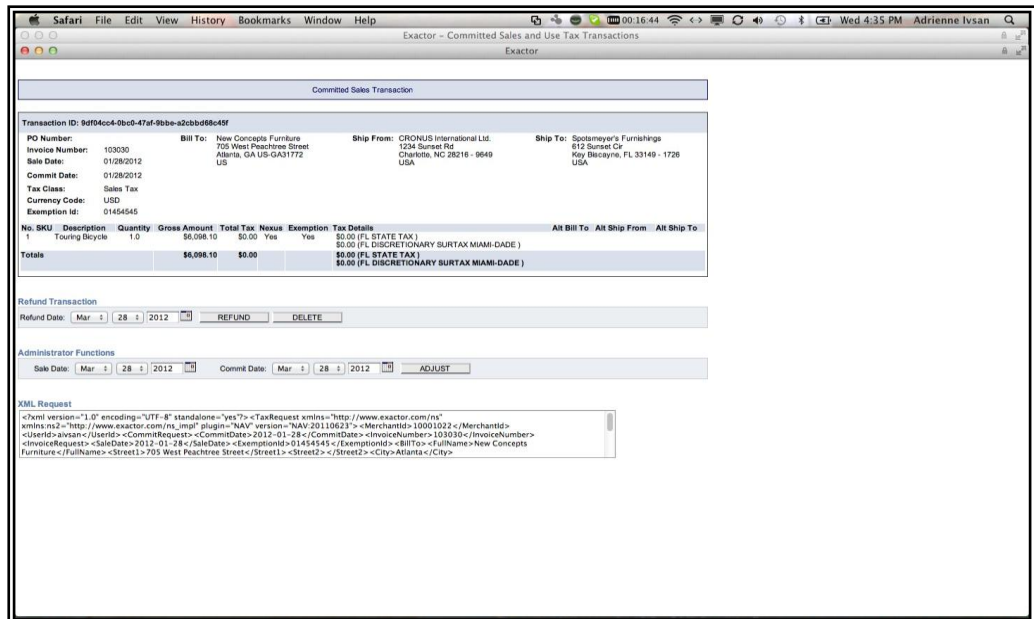
TRACKING THE TAXES CALCULATED

Once transactions have been synchronized with the **Exactor** system, the user can view complete transaction information, and details of the calculated taxed and reporting jurisdictions by logging in to the **Exactor Merchant Module Website**.

- Go to "Reports" (1)
 - "Committed Sales and Use Transactions" (2)
 - Select a specific transaction from the list and click "View".



From there, a window will open displaying the complete transaction details.



Thank you for using the Exactor Sales Tax Compliance Service and the Exactor Millennium POS Plug-in. If you have any questions, please do not hesitate to contact your Exactor representative, or e-mail us at customer.support@exactor.com.