MIVA 5.X SHOPPING CART – SALES TAX COMPLIANCE PLUG-IN: INSTALLATION & USER GUIDE

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MIVA PLUG-IN USER GUIDE

DESCRIPTION

This MIVA Exactor Sales Tax Compliance module was developed to enable businesses to incorporate and benefit from the Exactor sales tax compliance service within their MIVA shopping cart.   Once installed, neither the merchant, nor the customer, need to perform any additional functions to obtain sales taxes.   The taxes will be calculated and seamlessly displayed in the MIVA shopping cart, and because the shopping cart communicates with the Exactor system, the Exactor File module will be able to generate tax returns without the merchant having to transfer data from one system to another.
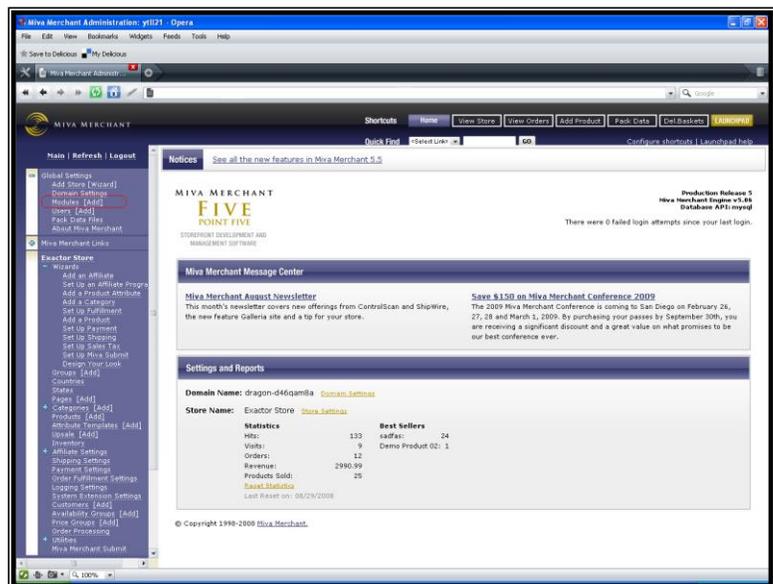
Note to QuickBooks Users*: If you use QuickBooks, or other accounting programs or ERP systems, the Exactor plug in will allow you to download transactions from the MIVA shopping cart into your accounting program.   You should download and install the Exactor QB plug-in as well.   What this means is that transactions that originated in the MIVA shopping cart, and were run through the Exactor system for calculation purposes (regardless whether or not sales taxes applied), can be downloaded in their entirety into your accounting software (e.g. QuickBooks), thus effectively bridging between the MIVA shopping cart and your accounting and ERP systems.*

Note*:   This User Guide provides information specifically for installing and using the Exactor Sales Tax Compliance module in the MIVA Shopping Cart.   More detailed information about the Exactor Sales Tax Compliance Service (including setting up an account, managing your account, reports and filing your returns) can all be found in the Exactor User Guide, which you can download and review from the Help tab in your Exactor admin web site.*

DOWNLOADING AND INSTALLING

The Exactor Plug-In file can be downloaded from the Exactor Control Panel.

Once the plug-in is downloaded and saved to your computer, enter the MIVA admin site.   Proceed to
→ Global Settings
         → Modules
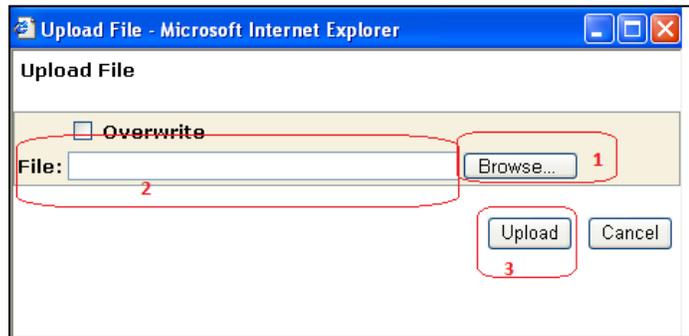 Click *Add*

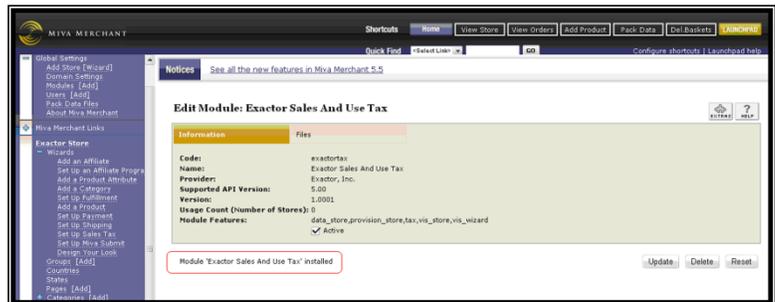In the *Add Module* window, click the Upload button.

An Upload window will open.
➤ Select the "Browse" (1) button
➤ Navigate to where you saved the Exactor plug-in file: "Exactor Miva Plug-in.mvc".   The file path will populate into File window (2)
➤ Select Upload (3)

The file path will populate into the File window (1).
Select "Add" (2)

The Edit Module window will open, with a confirmation that the Exactor module was installed.

SETTING YOUR EXACTOR ACCOUNT INFORMATION

Once the plug-in is installed, you will need to set-up your Exactor account information.   This is necessary in order to make sure that the MIVA Shopping Cart communicates correctly and accurately with the Exactor System, and calculates and stores transaction information.
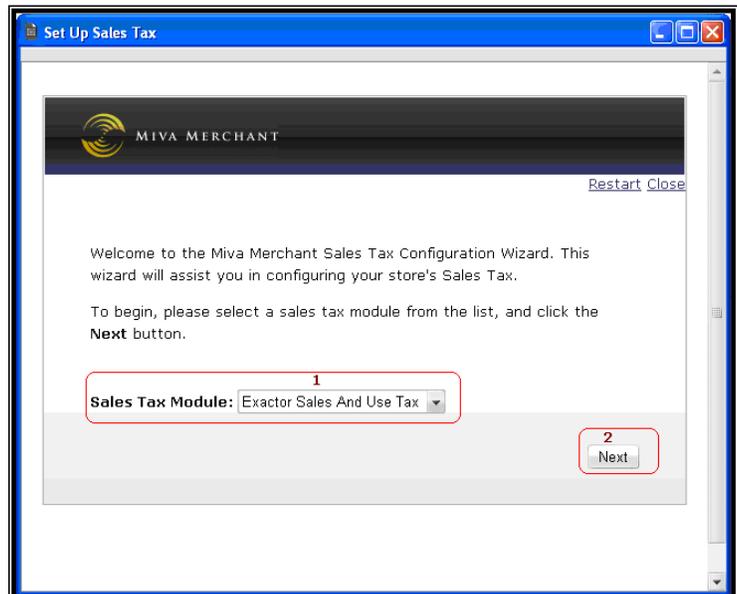
Navigate to your MIVA Admin Panel and select:
→ Wizards
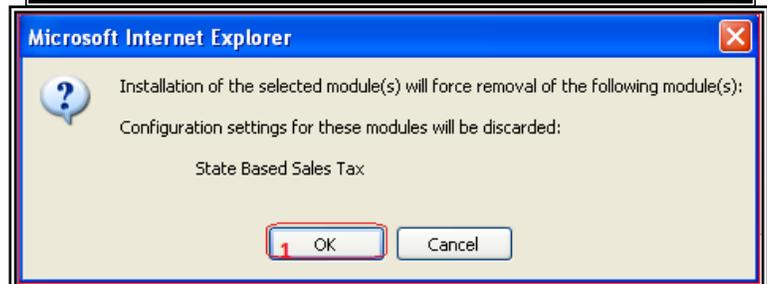   → Set Up Sales Tax
Click Next.

In the 'Set Up Sales Tax' window, select the Exactor Sales and Use Tax item from the Sales Tax Module drop-down list (1).
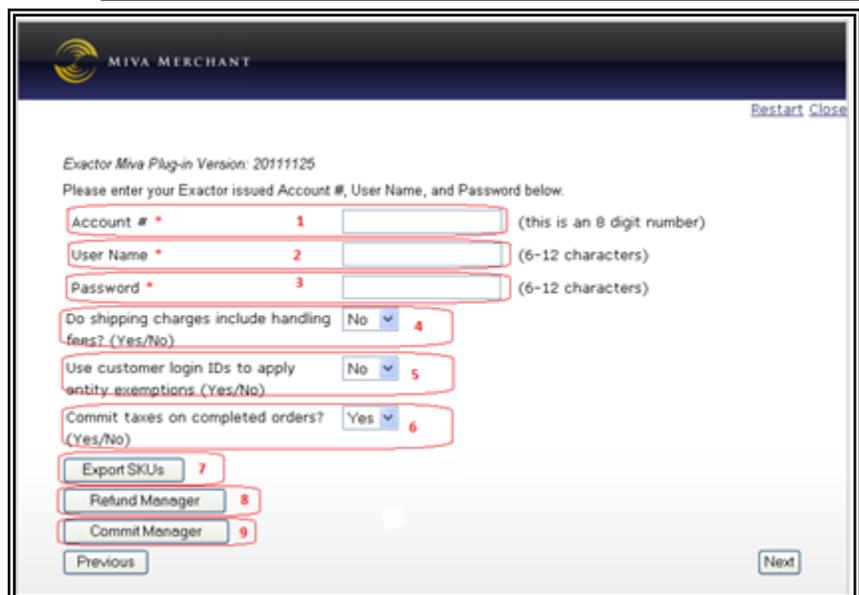
Select Next (2)

Please click OK (1) on the 'Remove State Based Sales Tax' window.

Make sure to complete the following information:
- **Account # (1).** The account number issued by Exactor when setting up your Exactor account
- **User Name (2).** You should apply a User Name that is unique for the shopping cart. *For more information, see "User Name" in the Exactor User Guide.*
- **Password (3).** You must insert the password exactly as it appears in the Exactor Control Panel. User name and password are case sensitive. Exactor's security system is set so that unless there is an exact match, your MIVA shopping cart will not be able to communicate with the Exactor system.
- **S&H charges (4).** – does shipping include "Handling" or is it shipping only? This will determine the correct tax rules which need to be applied.

- **Customer IDs to apply exemptions (5).** – Allows you to define customers as tax exempt in the Exactor merchant site, using the Customer ID as a key. If this is set to no, you will not be able process tax exempt customers.
- **Commit taxes (6).** – Commit taxes on completed orders? Choose between committing all completed orders or none. A 'No' selection will create only a calculation for every completed order. A 'Yes' selection (the default) will create a committed transaction for each completed order.
- **Export SKUs (7).** – Opens window that enables download of your entire product list for upload to our systems.
- **Refund Manager (8). –** Opens refund manager window that lists transactions that can be refunded.
- **Commit Manager (9).** – If 'Commit taxes on completed orders' (Question 6) is set to 'no,' then this window must be used to commit transactions so they are logged as completed sales in Exactor.

You must be sure to insert this information exactly as received from Exactor when setting up your account.   User name and password are case sensitive.   Exactor's security system is set so that unless there is an exact match between the Account Number, User ID and password fields, your MIVA shopping cart will not to communicate with the Exactor system. Any time that you change your Exactor password, you must make sure that you also update this information in the MIVA – Exactor module.   You can return to this page to update information as may be needed from time to time.

Do not be concerned if the following window appears.   Depending upon your system set-up, a dialog similar to this may appear, advising you that the module is accessing an outside service.   This is normal.   Rest assured that all components included with the plug-in have been thoroughly tested, and certification obtained where necessary.   Should such a window appear, you should approve, and allow the application to proceed.

In the next window, insert your Ship-From information.   The Exactor plug-in module will use this information for determining the applicable sales taxes.
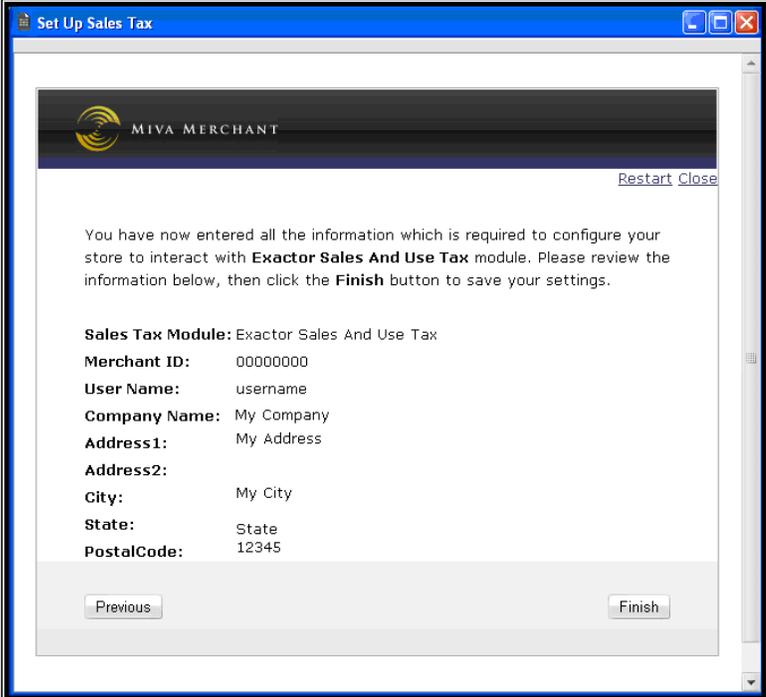
The Set-Up Sales Tax window will display the Exactor Sales and Use Tax module information you entered.   Click the "Finish" button for confirmation and to exit the Set Up process.

MAPPING YOUR PRODUCTS

After setting up the account information, you should proceed to mapping your products to Exactor Unified Codes ("*EUC"*).   Product Mapping is the term used when it is necessary for the Exactor system to identify the type of products you sell in order to correctly apply taxability rules.   Exactor applies its internal Exactor Unified Code ("*EUC*") to determine the tax rules that would apply to any given transaction – which rules apply to the subject product / service in the given taxing locality.   Because different taxes are applied to different product categories, Exactor requires its customers to map their products to the Exactor EUC, so that the Exactor Services can provide an accurate calculation in real time without disrupting the transaction flow.
For more information, see Chapter: Product Mapping in the Exactor User Guide.
Exactor has a complex, sophisticated and accurate tax logic engine.   Exactor stands behind is operations and tax calculations.   Therefore, when using the Exactor tax compliance service, the internal MIVA tax rules are not applied.

> **Note**:   As part of the set-up process, the Exactor module resets all MIVA internal tax rates to 0, so as to assure that there is no conflict with the Exactor processes and tax calculations.   Any change that you make to this process, such as changing the internal MIVA rates, will result in tax calculation errors.

Product mapping is performed from within the Exactor Control Panel (and **NOT** from within the MIVA shopping cart).   As part of the tax calculation process, the Exactor-MIVA plug-in transmits to the Exactor system what product is being purchased.   Based upon how the product is mapped within the Exactor Control Panel, the Exactor system will then apply the appropriate tax rules and rates to each separate line item.

Navigate to your MIVA Admin Panel and select:

→   Wizards
    → Set Up Sales Tax
Click Next.

In the Account Set Up window, select the "Export SKUs" button. Page 3 Button (7).   This will export the product SKUs from within your MIVA shopping cart to your Exactor Control Panel.

Do not be concerned if the following window appears.   Depending upon your system set-up, a request similar to this may appear, advising you that the module is accessing an outside service. This is normal.   Rest assured that all components included with the plug-in have been thoroughly tested, and certification obtained where necessary. Should such a window appear, you should approve, and allow the application to proceed.

A confirmation window will confirm the number of product SKUs that were uploaded to the Exactor control panel.   Click "OK" to close the window.

Please note: *If no product mapping is performed, Exactor errs on the side of caution, and assumes that all products are taxable.*   You should avoid not performing product mapping if you think that certain items could benefit from preferred tax treatment (such as reduced tax rates; tax holidays, etc).

In its compliance functionality, Exactor does not apply any external tax rules, such as those defined within the MIVA Admin Panel.   Rather, Exactor internal tax rules will be applied by Exactor based upon how you map these MIVA tax rules to Exactor EUC Codes, within the Exactor Control Panel.   If you do not perform any such mapping, Exactor errs on the side of caution, and assumes that all products are taxable.
MIVA SKUs, which are exported and loaded into the Exactor system, will appear in the Exactor Control Panel, in the Product Mapping tab, grouped under a general EUC-99990000, fully taxable, EUC classification.   Once you complete the export, proceed to your Exactor Control Panel to map the product SKUs to Exactor's EUC codes.   You will need to reclassify these to be mapped to their matching EUC codes.
    For more information on how to perform product mapping in the Exactor Control Panel, see Chapter: Product Mapping in the Exactor User Guide.
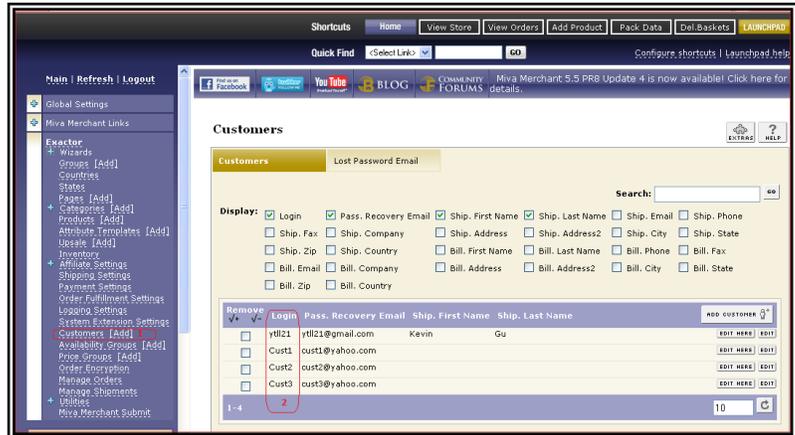
You can revisit the export function as frequently as necessary – each time the SKU export function will export into the Exactor system only those SKUs which have not yet been mapped in the Exactor system, and will not overwrite pre-existing product mapping classifications.

ADDING A CUSTOMER PERSONAL EXEMPTION
The Exactor plug-in module allows the user to use the Miva Login ID to enable a customer

based exemption for sales to entities that do not have to pay sales tax.

In the Admin menu, click Customers (1).   On this list presented the Login column (2) contains the login ID that you would enter into the Exactor Merchant Control Panel – Exemption Management.   (*For more information about the Exemption module, please see Chapter: Managing Exemptions in the Exactor User Guide*).

CALCULATE AND COMMIT TAX

Once installed, taxes will be calculated and displayed as an integral part of the MIVA shopping cart.

Before submitting the transaction total for credit card authorization, the MIVA shopping cart will display taxes calculated by Exactor in the order confirmation page.

You may see the break-down of the calculated taxes in your Exactor Control Panel.

For more information, please see "Reports" Chapter in your Exactor User Guide.

Taxes displayed in the "Order Review" page are calculation requests only. These taxes are not used for generating tax returns. If the customer abandons the shopping cart at this stage, or otherwise their credit card is not authorized, the transaction will remain in the Exactor system, but as a calculation request only. It will not be converted to a "commit" request, and will not be used for generating tax returns.

Once the transaction is confirmed, after clicking the "Place Order" button, and upon receipt of the credit authorization, the transaction will be committed, and the calculated taxes will be applied to the next tax return.

> ➤ **TAX CALCULATION REQUEST**.   In this option, the Exactor system will perform an accurate tax calculation based upon transaction data inputted into the shopping cart. The transaction data, and tax information, are stored in the Exactor system, but will NOT be used for reporting or tax filing purposes.
> ➤ **COMMITTED SALES TRANSACTION**.   In this mode, taxes are calculated, and the transaction data, and taxes, are written into the Exactor system, and stored for tax reporting purposes.
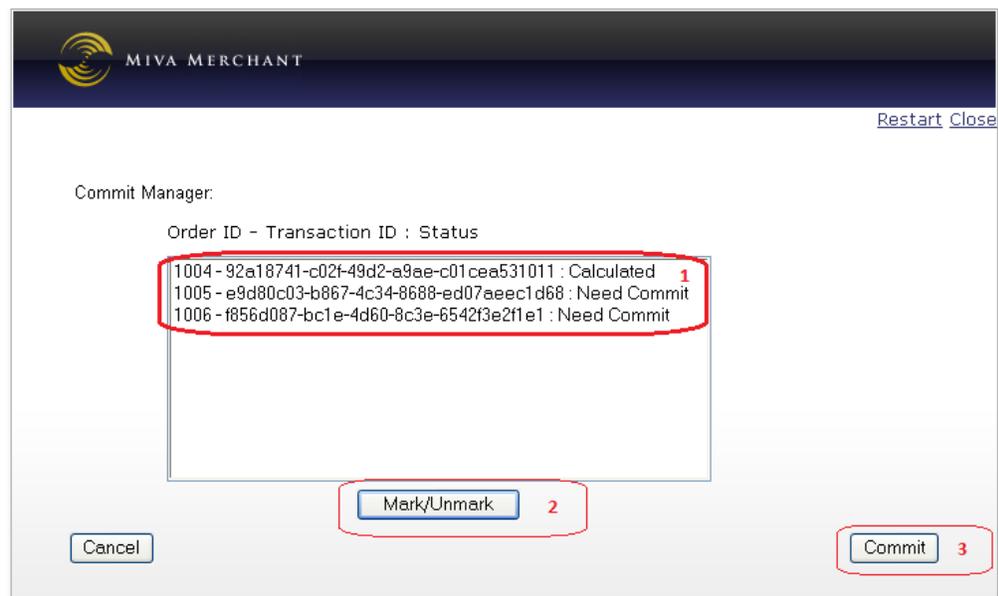> *For more information about committed transactions and calculation requests only, see the Chapter "Reports" in the Exactor User Guide.*

If your answer No on the setup screen question: "Commit taxes on completed orders? (Yes/No)" Page 3 Question (6).   then you have to manually approve your sales as committed transactions in order for Exactor to report them on your Tax Returns. This is done in the Commit Manager, which is opened by the Commit Manager button in the Exactor control panel Page 3 Button (9).

COMMITTING A TRANSACTION

To commit a Transaction, Navigate to your MIVA Admin Panel and select:

> ➤ Wizards->Commit Manager. Page 3 Button (9).
> ➤ Select the transaction to commit (1)
> ➤ Click the Mark/Unmark Button (2).   Do this for each order you wish to commit the taxes for.   You can use the Mark/Unmark button to revert the transaction to the 'Calculated' state as well.

> ➤ After all transactions you wish to commit are labeled 'Need Commit,' click the Commit button (3).   The taxes for these transactions will be committed into the Exactor system and this window will close.
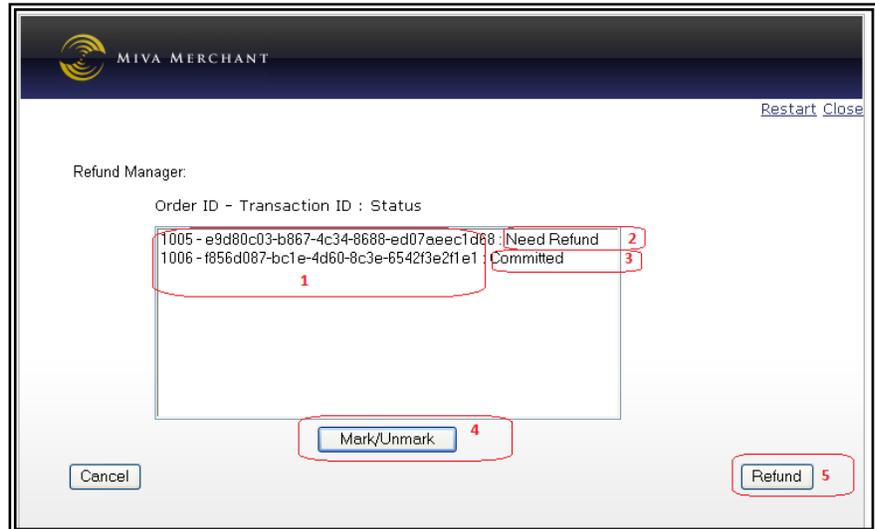
CANCELLING A PURCHASE – REFUNDING THE TAXES

Cancelling an order will result in a credit of the calculated taxes.

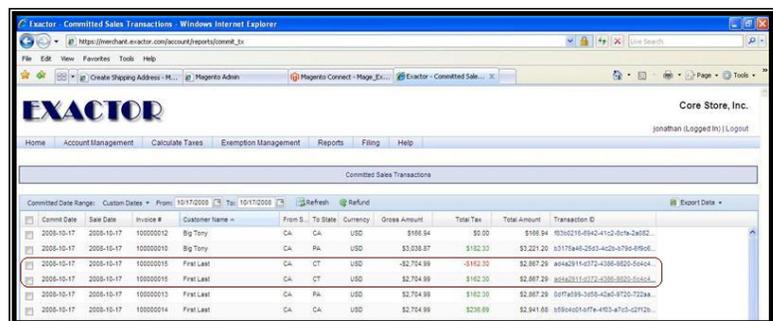To apply a refund, Navigate to your MIVA Admin Panel and select:
→ Wizards
→ Set Up Sales Tax
Click Next. Click on the 'Refund Manager' button. Page 3 Button (7).

In the Refund Manager window, you will see all transactions that have been deleted in the MIVA shopping cart (1), but which have not yet been refunded to the Exactor system. Their Exactor status will be displayed (2, 3).

➤ Highlight the transaction you want refunded (1).
➤ Select the Mark/Unmark Button (4).
➤ The status of the transaction will change to "Need Refund" (3), confirming that the refund will uploaded into the Exactor system, and the taxes will be reversed.
➤ Click the Refund Button (5) to complete the refund process.

A matching credit will be written into the Exactor System.

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