



**VIRTUEMART SHOPPING CART –
EXACTOR SALES TAX
COMPLIANCE
PLUG-IN:
INSTALLATION & USER GUIDE**

Confidential

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INTEGRATION OVERVIEW

This **Exactor Virtuemart plug-in** was developed to enable businesses to incorporate and benefit from the Exactor sales tax compliance service from within their Virtuemart invoices and sales orders. Once installed and configured, the user does not need to perform any additional functions to obtain sales taxes. The taxes are calculated and seamlessly displayed in all transaction forms which require Sales Tax calculation, and because the invoice and sales orders communicate with the **Exactor System**, the Exactor Virtuemart plug-in generates tax returns without having to transfer data from one system to another.

More detailed information about the Exactor Sales Tax Compliance Service including: Account Setup, Account Management, Reports, and Filing Returns are outlined in the Exactor User Guide, available for download from the "Help" tab within the Exactor Merchant Module Website.

Note: *This manual outlines most typical Virtuemart scenarios and is not intended to detail all possible Virtuemart configurations.*

Virtuemart itself is a plug-in for a popular PHP content management system called "Joomla!". Virtuemart extends Joomla with shopping cart feature and allows Joomla! administrator to manage and track shopping cart related stuff via Joomla! back-end.

INSTALLATION PACKAGE

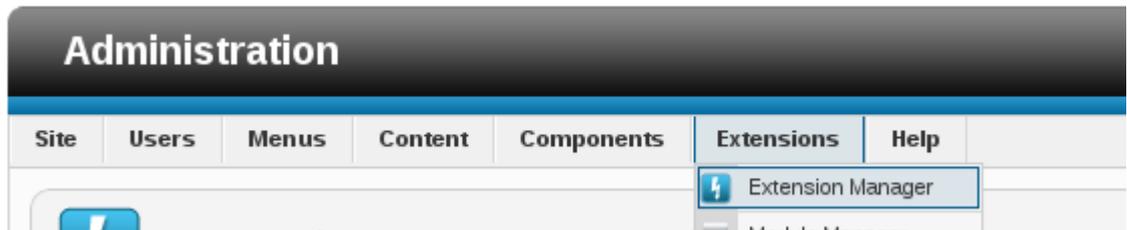
Exactor plug-in is distributed as a Joomla! extension package. This allows using Joomla Extension Manager (Web GUI for installing and managing extensions) for plug-in installation. Thus, the plug-in can be installed as any other Joomla extension. See the next section for details.

Note: Joomla! backend is typically located under “/administrator/”.

INSTALLATION

The easiest way to do the installation is to use the Web downloader:

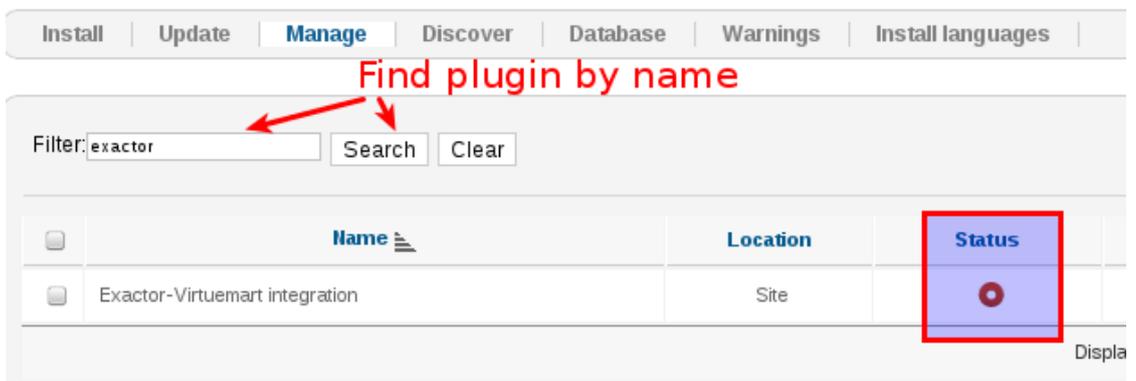
1. Open extension manager:



2. Select extension file by clicking on the “Choose File” button(1) and submit it (2):



3. It is **extremely important** to enable the plug-in after installation. By default all new extensions are disabled (Security Policy of Joomla). To do this, click on the “Manage” tab of the “Extension manager” and find the plug-in by name using “Filter” field. Just type “exactor” and press the “Search” button.



4. Since the plug-in is disabled after installation, you will see red circle in the status column (see the picture above). Click on it to switch the plug-in status.
5. Once the plug-in is enabled, installation is finished. However, the plug-in will not do anything before you configure it.

Note: There are other installation methods. See Joomla! documentation for more details:

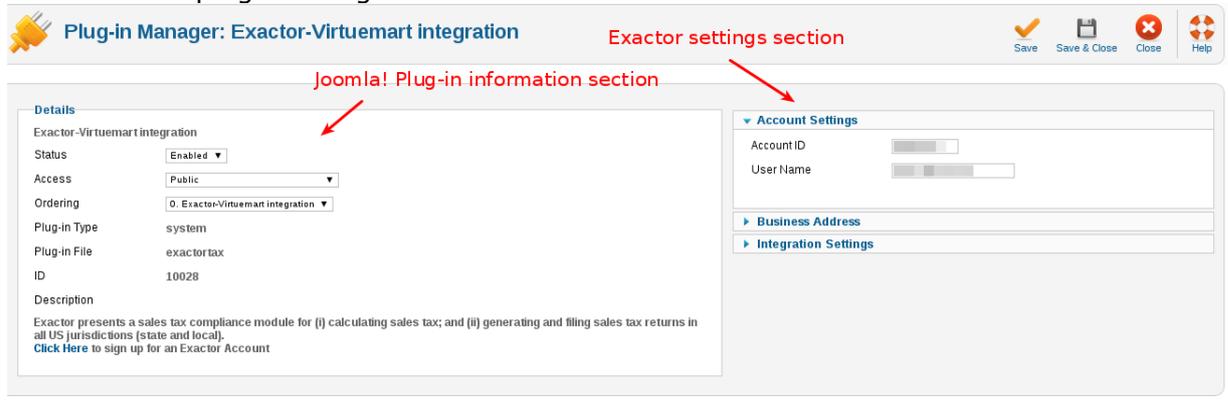
- http://docs.joomla.org/Installing_an_extension

CONFIGURATION

Plug-in settings page is integrated into the Joomla! plug-in info page. To open it, navigate to the "Plug-in Manager":



Then find the plug-in using the "Filter" field and click on its name.



The settings page has 3 sections:

1. Exactor account information.
2. Company address information (will be used as Ship From address in Exactor transactions).
3. Integration options. This section allows setting up "Effective date", "Source of SKU" and other parameters.

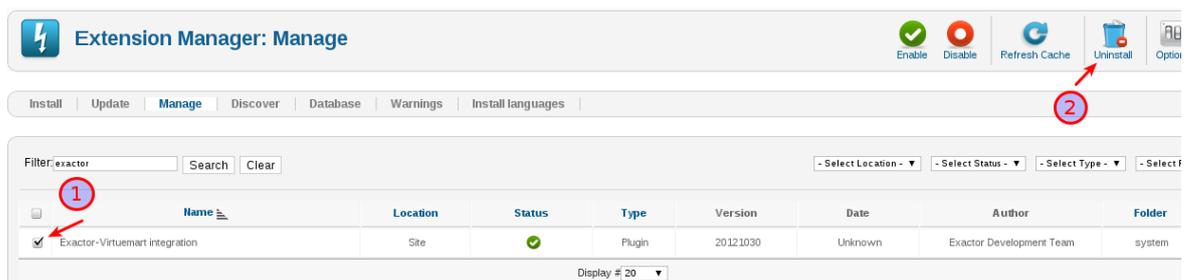
Once you have filled in the form, the plug-in will generate the test transaction. You will be notified in case the settings are incorrect.

UN-INSTALLATION

Joomla allows disabling plug-ins which means that files and DB records will be preserved but not used, or uninstall it which removes all plug-in related content from the filesystem and DB.

The easiest way to do this is to use Extension manager:

1. Open Extension Manager, select "Manage" tab and find Exactor plug-in (see section "Installation" for instructions).
2. Activate the checkbox near plug-in name (1) and click on the "Uninstall" button(2):



TAX OPERATIONS

TAX CALCULATION

The plug-in rewrites all Virtuemart logic related to tax calculation. Originally Virtuemart calculates tax basing on the product and allows displaying tax in the product catalog.

Rating: Not Rated Yet
Price:
Base price with tax: \$3.27
 Sales price: \$3.27
Sales price without tax: \$2.99
Tax amount: \$0.28



Exactor plug-in removes any tax related information from the catalog including such fields as "Price with tax", "Price without tax", etc.

Note: The plug-in just disables displaying these options in Virtuemart config during the installation step. Merchant is still able to turn it on manually; tax will be always 0, so amounts for "Price with tax", "Price without tax" and "Sales tax" always will be equal.

TAX ESTIMATION ON THE CART PAGE

The plug-in performs real time tax estimation for products which are currently in the cart. Once buyer specifies address information or logs in, the plug-in generates Exactor transaction to estimate taxes and injects values into the cart.

Bill To

Boston Herald
 stevenfray@gmail.com
 Mr Boston Herald
 70 Fargo St
 02210 Boston
 United States
 New York
 12112321321
 You agreed to the Terms of Service

[Add/Edit billing address information](#)

Ship To

Only in case shipment address is different from billing address, click »Add/Edit shipment address« button below

[Add/Edit shipment address](#)

Buyer information is provided

Name	SKU	Price:	Quantity / Update	Tax Discount	Total
Nice Saw	H01	\$24.99	1	\$1.56	\$26.55
Product prices result				\$1.56	\$26.55
No shipment selected Select shipment					
The first payment method				\$0.13	\$2.13
Total:				\$1.69	\$28.68

Estimated tax

Notes and special requests

[Click here to read terms of service and check the box to accept them.](#) [Check Out Now](#)

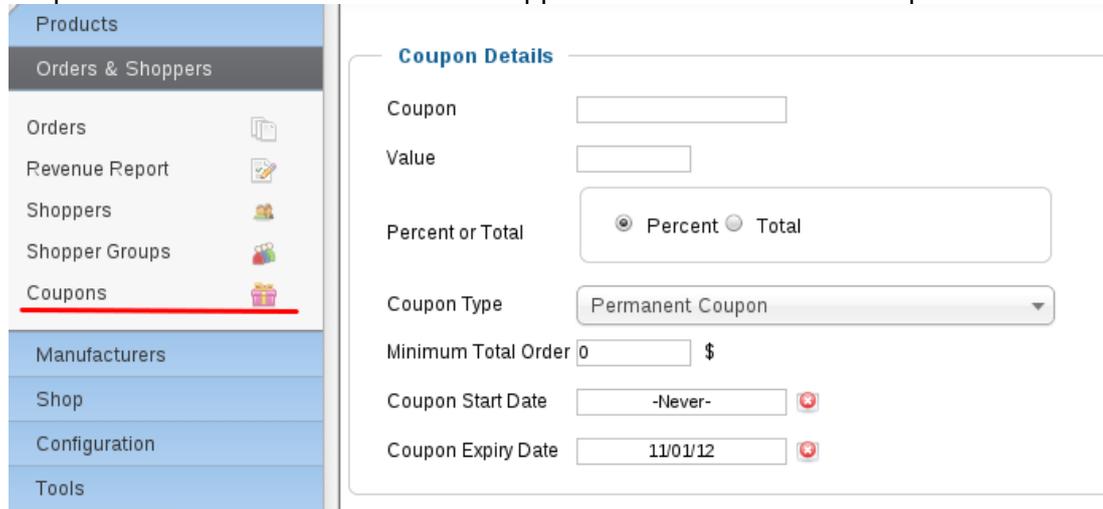
On the Exactor side:

Sale Date Range: October 2012 From: 10/01/2012 To: 10/31/2012									
<input type="checkbox"/> Sale Date	PO Number	Customer Name	From ...	To State	Tax Class	Currency	Gross Amount	Total Tax	Total Amount
<input type="checkbox"/> 2012-10-31	<u>Tax Estimation</u>	Boston Herald	NY	MA	S	USD	\$26.99	\$1.69	\$28.68

COUPONS

The plug-in is able to handle coupons and other price modifiers. If cart contains coupons or some of the price rules have been applied, the plug-in will include a separate line item in the transaction.

Use "Coupons" section of the "Orders & Shoppers menu" to create a coupon:



Coupon Details

Coupon

Value

Percent or Total Percent Total

Coupon Type

Minimum Total Order \$

Coupon Start Date

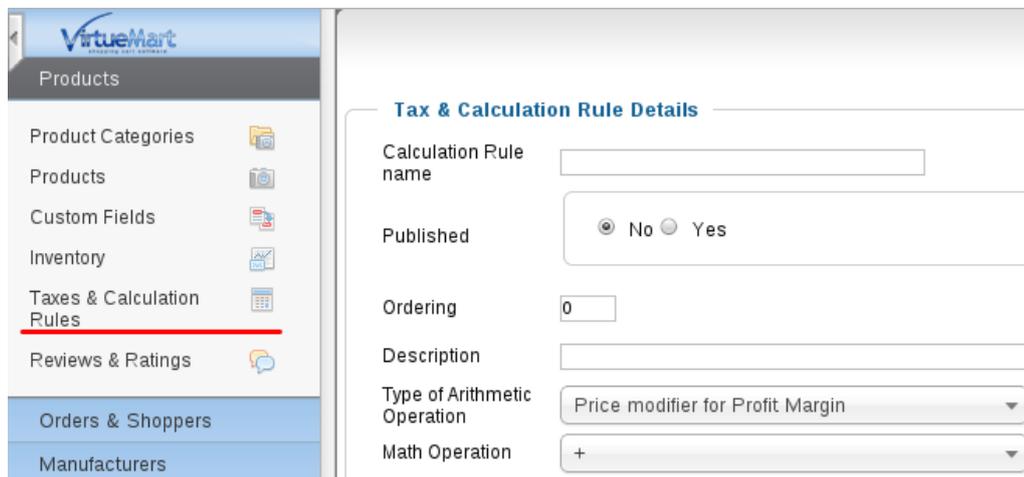
Coupon Expiry Date

Note: Non-taxable EUC will be used for coupons in Exactor transaction.

CALCULATION RULES

Price calculation rules in Virtuemart allow changing the final price basing on the given conditions (e.g. ordered qty, total amount, etc.). It is important to understand that such rules are not discounts but rather price modifiers applied to the final order amount. The plug-in will also apply non-taxable EUC for line item in case it is negative and leave it without EUC otherwise.

To create a new price calculation rule, use "Taxes & Calculation" menu under "Products" section:



Tax & Calculation Rule Details

Calculation Rule name

Published No Yes

Ordering

Description

Type of Arithmetic Operation

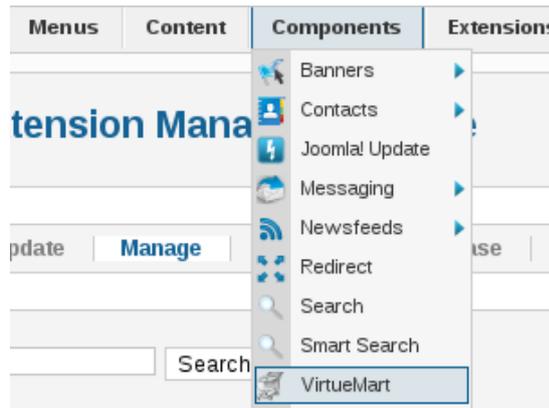
Math Operation

HANDLING ORDER STATUS

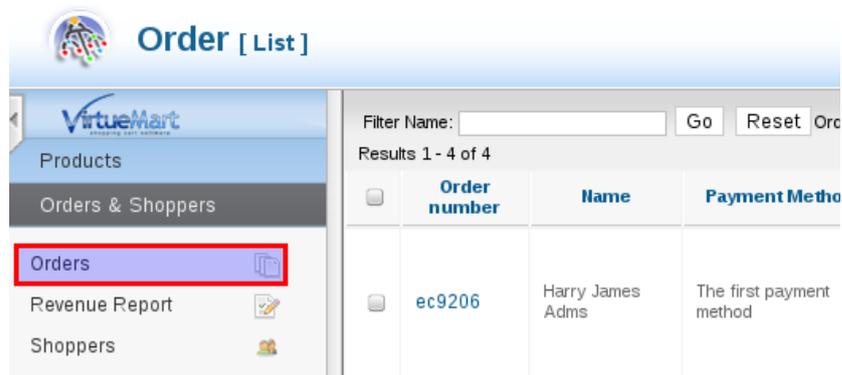
Depending on the settings, the plug-in is able to generate commit transaction when order status changes. For now the following modes are supported:

- On Submission - Once buyer finished check out process.
- On Shipping - Once merchant changes order status on "Shipped"(S).
- On Payment - Once order status is "Confirmed" (C).
- Never - Commit transactions will not be generated at all.

To change order status, they should open Virtuemart control panel in the Joomla! backend:



Then open "Orders" page:



And select the needed order by clicking on the order number. Then click on the "Update status" link on the top right corner of the page:

Date Added	Shopper Notified?	Status	Comment
Wednesday, 31 October 2012 13:47	No	Pending	
Wednesday, 31 October 2012 13:47	Yes	Pending	
Wednesday, 31 October 2012 13:48	Yes	Shipped	

[Update Status](#) +

REFUNDS

Once order status is changed to "Refunded"(R) or "Canceled"(X), the plug-in generates a negative commit transaction with the whole order amounts.

Note: only already committed items will be included into this transaction.

HANDLING PARTIAL REFUNDS\PAYMENTS\SHIPMENTS

Virtuemart allows changing status for items instead of changing status for whole order. It means that merchant can always refund a specific item(-s) from the order. To do so, on the order page change status near the line item (1) and approve changes by clicking on the "Save" link below items:

Quantity	Name	SKU	Status of ordered products	Product Price (Cost)
1	Hand Shovel heavy duty	G01-03	<div style="text-align: center;"> Refunded <input type="text" value="Refunded"/> </div>	\$79.99
<div style="display: flex; justify-content: space-between;">  Save  Cancel </div>				
				SubTotal: \$79.99

EXACTOR SPECIFIC INFORMATION

ENTITY EXEMPTIONS

There is an option on the plug-in settings page which allows using Entity Exemptions. This means that each Exactor transaction will contain user ID in the "Entity Exemption" field. Definitely it will work only for authorized buyers which have a store account. To locate Joomla! user ID, open "User Manager"



There should be a column called "ID" in the users' list table:

Name	User Name	Enabled	Activated	User Groups	Joomla! user ID	Last Visit Date	Registration Date	ID
Super User	admin	✓	✓	Super Users	admin@admin.com	2012-10-31 15:13:42	2012-10-30 21:36:41	203

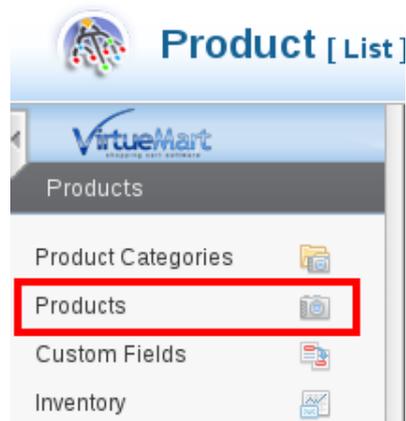
Display # 20

SKU SOURCE

The plug-in provides several options for source of SKU information:

1. Product SKU;
2. Category ID.

To locate product SKU, open Virtuemart Control panel and select "Products" under "Products" section:



Open product page you are interested in by clicking the product name. SKU code will be under the first tab called "Product Information":

Product Information Product Description Product Sta

English (United Kingdom)

Product Information id: 15

Published? No Yes

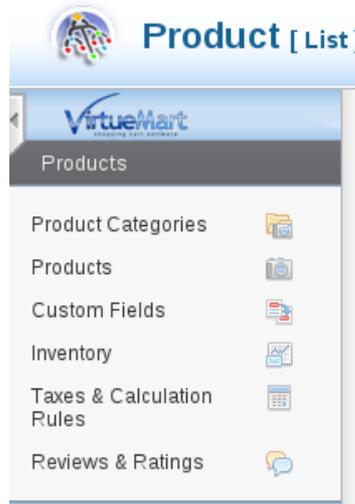
Product SKU L02

Product Name Wooden Ladder

Product Alias wooden-ladder

URL

To locate category ID, open "Product Category" section under "Products" menu:



Category ID will be in the last column for the table:

Category Name	Description	Products	Ordering	Published	Id
Power Tools	Power Tools	2 [Show]	<input checked="" type="checkbox"/> 2	<input checked="" type="checkbox"/>	2
└ Outdoor Tools	Outdoor Tools	1 [Show]	<input type="checkbox"/> 4	<input checked="" type="checkbox"/>	4
└ Indoor Tools	Indoor Tools	1 [Show]	<input type="checkbox"/> 5	<input checked="" type="checkbox"/>	5
Hand Tools	Hand Tools	3 [Show]	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/> 1	<input checked="" type="checkbox"/>	1
Garden Tools	Garden Tools	3 [Show]	<input checked="" type="checkbox"/> 3	<input checked="" type="checkbox"/>	3

Display # 10

Thank you for using the Exactor Sales Tax Compliance Service and the Exactor Virtuemart 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.