



## AccurateTax TaxTools Advanced

The AccurateTax TaxTools - Advanced Service (TTA) scrubs and validates customers' US-based shipping addresses, looks up the correct sales tax rate(s) based on the address provided and your account configuration, and calculates the tax amount and adds it as a charge to the customer's order.

This solution operates as a Software as a Service (SaaS) solution. Meaning, there are two components to this solution - 1) the Miva Merchant module and 2) AccurateTax Sales Tax Server. Once your account is setup with AccurateTax to use the service, and the module is installed, your customers will have their addresses scrubbed and validated against the US Postal Service (USPS) dataset and the configured sales tax will be charged on all orders.

### How it works

During normal checkout, customers are required to enter their shipping address information. Once the form on the OCST page is submitted, an xml request message is forwarded to the AccurateTax servers with the shipping information. The address data is then cross referenced with the USPS dataset through a series of algorithms to determine exactly what the correct address, city, state and zip+4 codes are for your customer. This is what we refer to as Address Scrubbing and Validation.

Ideally, the system returns a single set of data that can be used as the official shipping information. However, in some cases due to the address information entered, the algorithm simply cannot determine which address is the ideal, and so multiple results will be returned to your store.

In both cases, the customer is taken to the Address Confirmation page (pagecode: ATADDR) and then has the option to select the address we have provided, to continue using use their own, or to return to the OCST page to make a change.

TaxTools Advanced customers may choose to scrub only addresses in states where sales tax is collected for the business, or you may choose to scrub all US-based addresses regardless of taxability. Each Address Request made to the AccurateTax servers is referred to as a "call". Since this solution is a SaaS offering, there is a monthly subscription that you, as the storeowner, sign up for. Each unique call to our servers counts as a call against your monthly call count. (You can check your call counts for a given month by logging into your account on our website.)

### How to Install

- Installing the Module
  1. Unzip at\_advanced\_5.zip to your hard drive (the ZIP filename may be different if purchased through a site other than ours)
  2. Log into your Miva admin utility
  3. Expand the navigation tree next to **Modules**
  4. Click the link "[Add]" next to "Modules"

5. Click the "Upload File" button
  6. Click the "Browse" or "Choose File" button
  7. Browse to the location where you stored the files from accuratetax\_address.zip
  8. Select accuratetax\_advanced.mvc
  9. Click the "Upload" button
  10. When the module has been uploaded, the small "Upload File" window will disappear, leaving you with the main Miva admin screen visible
  11. Click the "Add" button on the main Miva admin screen
- Associating the Module with a Store
    1. Inside your Miva Merchant admin utility, click the name of your store on the left side of the screen
    2. On the right side, click the "Settings" tab
    3. In the Sales Tax Calculation dropdown, choose AccurateTax Advanced
    4. Click the "Update" button
    5. Your store may warn you that you will lose settings for your existing tax module. You must allow this to happen in order to proceed with installation. To do so, click the "OK" button.
    6. Once the screen refreshes, click the new tab labeled "AccurateTax Advanced". Enter your license key and submit the form.
    7. On the next screen, enter your checksum in the first box.
    8. Set the URL to <https://enterprise.accuratetax.com/service.php> if it's not already pre-filled to that value.
    9. Choose the correct radio button to indicate whether you combine shipping and handling fees into a single charge. Some states charge sales tax on shipping and on combined shipping/handling fees, but not on separate handling fees.
    10. Decide whether you want to validate all addresses, or only the addresses in states where you will be charging sales tax. Select the appropriate radio button.
    11. Check the box next to each state in which you have a nexus or are otherwise required to collect sales tax.
    12. Click the "Update" button at the bottom to save your changes.

## Create Address Confirmation Page Template

The next step is to create the Address Confirmation page, which is used as part of the Address Scrubbing and Validation process. The page has a code of ATADDR. The store morph template code for this page is contained in your ZIP file and named either cssui\_ATADDR.mvt or mmui\_ATADDR.mvt. Use the one that corresponds with the UI that your Miva Merchant store uses. If you need to determine which UI your store uses, perform the following steps:

1. Inside the Miva Merchant admin, click the name of your store on the left side
2. Click the "Settings" tab
3. Look at the "Store User Interface" setting. It's a setting that cannot be changed. If it says "Miva Merchant Look & Feel" then your store uses MMUI, and you should use code from mmui\_ATADDR.mvt. If it says "Miva Merchant CSSUI" then your store uses CSSUI, and you should use code from cssui\_ATADDR.mvt.

Once you have determined your store's UI and opened the source code, perform the following steps in your Miva Merchant admin utility to create the ATADDR page:

1. On the left side, click the “+” sign next to the name of your store to open up additional options.
2. Click the link labeled “[Add]” next to the “Pages” link
3. In the field labeled “Code”, enter the value “ATADDR” (without the quotes)
4. In the field labeled “Name”, enter the value “Address Validation” (without the quotes)
5. In the large field labeled “Template”, enter the code from the cssui\_ATADDR.mvt or mmui\_ATADDR.mvt file
6. Click the “Add” button

Please note that you may change the HTML in the ATADDR page to match the layout of your store. However, you should be careful not to change any of the code that would change the way the page operates, including the AccurateTax-related store morph template code, the hidden form fields, etc.

## Testing

To test your configuration, go to your storefront, add one or more products to your shopping cart, and start the checkout process. You may checkout as a guest or log into a customer account. Make sure the shipping address you enter is a US-based address. (Our service will not scrub non-US addresses; they will be passed through as-is to the next step of checkout.)

Submit the customer information form (OCST or OINF screen). Normally at this point you would see either the Order Upsell (OUSL or OUSM) screen or the Shipping and Payment Selection (OSEL) screen. If the module is working as it should, you will instead see the special “ATADDR” screen that you configured above. You should see the original address first, and then one or more scrubbed and validated addresses after that. If you choose one of the validated addresses, the next screen will show the validated address under your shipping information. If you are logged into a customer account and kept the “Update Customer Record with This Information” box checked, then the validated address you selected will also be saved to your customer record.

After selecting one of the validated addresses, on the next screen (OSEL) select any valid method for the shipping and payment methods. Click the continue button to go to the next screen; this is where Miva Merchant calculates sales tax. When the next screen (OPAY) loads, you should see a line item in your basket with the sales tax amount.

If you do not see a sales tax line or if the sales tax is \$0, check the following:

- Is at least one item in your cart marked as taxable?
- Did you enter a shipping address in a state that you checked as taxable in the module’s admin? All non-taxable states will have a \$0 sales tax charge.

## Support

For support configuring your store to work with AccurateTax, visit <http://support accuratetax.com> or contact your account manager.