



# AccurateTax Enterprise for MIVA Merchant

AccurateTax is a product that allows online retailers to accurately calculate and charge sales tax on all orders shipped within the United States. The Enterprise version of AccurateTax scrubs and validates the shipping address, looks up the correct sales tax rate(s) for the order based on the address and the items in the order, and calculates the tax amount, adding it as a sales tax charge to the customer's order. The solution consists of a MIVA Merchant module that is installed on the retailer's store, and the centralized AccurateTax server-based application that is hosted on our systems.

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## Installation

Before installing the AccurateTax module in your store, you should have the following:

- A MIVA Merchant store running on MySQL (mivasql is not supported) and the login information to access the administration utility (“back end”)
- The ZIP file containing the module to be installed
- Your license key and checksum
- Knowledge of the state(s) in which you have nexus
- Knowledge of whether you wish to scrub all addresses, or just those for taxable orders

Once you have this information, proceed with the steps below to install and then configure AccurateTax Enterprise in your MIVA Merchant store.

### Installing the Module

1. Unzip **at\_enterprise\_5.zip** to your hard drive (the ZIP filename may be different if purchased through a reseller)
2. Log into your MIVA Merchant back end administration utility
3. Click the Menu button and choose **Modules**
4. Click the “+” button in the upper right corner to add a new module
5. Click the **Upload** button. A popup window will appear.
6. Use the popup window to upload **accuratetax\_enterprise.mvc** to your server.
7. Click the “**+ Add**” button to install the module in your instance of MIVA Merchant.

### Setting Your Store to Use AccurateTax

1. Click the menu button and choose Store Settings
2. Under the **Settings** section, for **Sales Tax Calculation**, choose **AccurateTax Enterprise**
3. Click the **Update** button in the upper right corner
4. MIVA Merchant will warn you that you will lose your settings for the existing tax module. You must allow this to happen in order to proceed with installation. To do so, click the **OK** button in the popup warning.
5. After switching your store to use AccurateTax Enterprise, a new tab will appear labeled “AccurateTax Enterprise”. Depending on your store and your monitor resolution, you may have to click the “...” button (shown below in blue; it’s dark gray when it hasn’t yet been clicked) to access the tab.

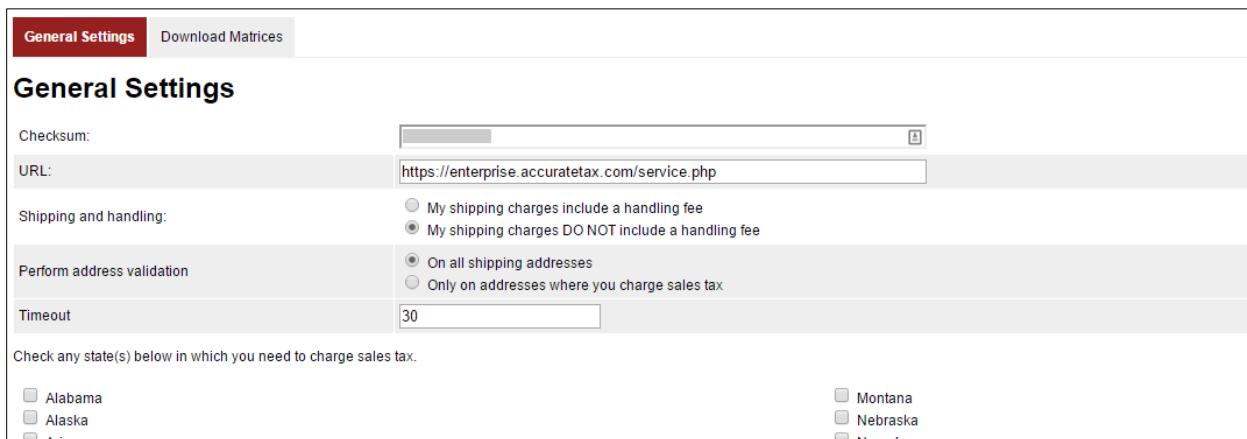
Edit Store: Test Store

Store Details	States	Countries	Customer Fields	Digital Download Settings	Digital Download CDNs	...	Update	Reset	More
<b>Identification</b>									
<b>Owner</b>									
<b>Settings</b>									
Weight Unit Display Suffix:	pounds								
Weight Units:	Pounds								
Dimension Units:	Inches								
Basket Timeout (Minutes):	360								
Legacy Price Group Overlap Resolution:	Highest Price								
Store User Interface:	Miva Merchant CSSUI								
Sales Tax Calculation:	AccurateTax Enterprise								
Currency Formatting:	US Currency Formatting								
Character Set:	utf-8								
<input checked="" type="checkbox"/> Require Tax									
<input type="checkbox"/> Allow Modules Used by Store Morph Items to be Uninstalled (Not Recommended)									

# Module Configuration

## Global Settings

1. Click the new tab labeled **AccurateTax Enterprise**.
2. Enter your license key and click the **Update** button. When the screen refreshes, you should see a message that says **License Accepted** at the top. You may also see a warning if the module was unable to automatically create the ATADDR page. There is no need to worry about the warning at this point; the ATADDR page is discussed in the **Address Validation Screen** section of this document.



General Settings

Checksum:

URL:

Shipping and handling:  My shipping charges include a handling fee  
 My shipping charges DO NOT include a handling fee

Perform address validation:  On all shipping addresses  
 Only on addresses where you charge sales tax

Timeout:

Check any state(s) below in which you need to charge sales tax.

Alabama       Montana  
 Alaska       Nebraska  
 Arizona       Nevada

3. Fill in the appropriate fields as follows:
  - a. **Checksum** – enter the checksum provided to you by AccurateTax
  - b. **URL** – should be **https://enterprise.accuratetax.com/service.php** unless otherwise advised by AccurateTax
  - c. **Shipping and handling** – choose the radio button that corresponds to your store's shipping charges. If you add a handling fee onto your shipping charges and they are combined into a single charge in your shopping cart, choose the first button. If you do not charge handling, or if you charge handling but it's a separate line item in your shopping cart, choose the second button.
  - d. **Perform address validation** – choose the radio button to indicate whether you'd like to scrub and validate all shipping addresses, or only the addresses in states where you have nexus. Scrubbing all addresses will give you cleaner shipping data for your orders, but it will result in a greater number of calls to our server.

- e. **States** – check the box next to each state in which you have nexus, or a business presence that requires you to collect sales tax. If you need help determining nexus, contact your legal counsel or accountant.
4. Click the **Update** button.

## Download Matrices

After you've installed the module for the first time, you'll need to download the taxability matrices from the AccurateTax server. This generally only needs to be done once (though there is the capability to re-download them should states ever decide to change their matrix codes). To do so, you will click the maroon "Download Matrices" sub-tab on the AccurateTax module's administration page. Then, simply click the turquoise "Update" button in the upper right corner, and the matrices will be downloaded into your local database.

Please allow enough time for the data to be downloaded. Once it has finished, the screen will refresh and instead of the two sub-tabs shown before ("General Settings" and "Download Matrices"), you will now see five sub-tabs ("General Settings", "Re-Download Matrices", "Product Classes", "Shipping Classes", "Charge Classes").

## Product Classes

In your store, you need to indicate the tax class for your products. Certain states have different taxes on different products – for example, clothing and food may be taxed differently from other products. To begin this process, you need to set the default product tax class for your entire store. After doing so, you can set the tax class for individual products if they differ from your default product tax class.

General Settings Re-Download Matrices Product Classes Shipping Classes Charge Classes

**Default Tax Classes for Products**

Set the tax classes that will be applied to all products in your store unless a product specifically has different tax classes applied.

**Add a New Tax Class**

To add a new default tax class, select a state, category, and subcategory, and then click the Update button.

Choose a State: <Select One>

Choose a Category:

Choose a Subcategory:

Give it a Nickname (Optional):

**Current Assigned Tax Classes**

Remove	State	Nickname/Description
<input type="checkbox"/>	CA	<a href="#">Taxable Goods...</a>
<input type="checkbox"/>	FL	<a href="#">Taxable Goods...</a>

## Default Product Classes

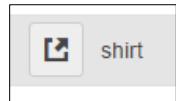
1. Click the **Product Classes** sub-tab.
2. Next you need to enter one default product class for each state in which you're charging sales tax (as determined by the state checkboxes on the main **General Settings** sub-tab). To add a new default product tax class, fill in the following fields:

- a. **Choose a State:** Select a state from the dropdown
  - b. **Choose a Category:** Select a category from the dropdown. The dropdown will be empty until you select a state from the dropdown above.
  - c. **Choose a Subcategory:** Select a subcategory from the dropdown. The dropdown will be empty until you select a state and a category from the dropdowns above.
  - d. **Give it a Nickname:** This is optional, but if it helps you remember the tax classes based on your own naming conventions you may enter a nickname here.
3. Click the **Update** button to add this tax class to the table.
  4. Repeat as needed for all other states in which you charge sales tax. There should be exactly one default product tax class for each state in which you charge sales tax.

### Product Class Overrides

Certain products may need to be assigned a different product tax class than the default class for the rest of your store. To set the product tax class for an individual product, edit the product within MIVA Merchant:

1. Click the Menu button, then choose **Catalog**
2. Browse or search for the product whose tax class you wish to set individually
3. Hover over the product until the edit button appears, and then click the Edit button. It has a square with a diagonal arrow icon, as shown in this image below:



4. Click the **AccurateTax Tax Class Override** tab. This may be hidden behind the “...” button; if so, click that button and then choose the tab name.
5. You may enter a specific tax class for one or more states in which you charge sales tax:
  - a. **Choose a State:** Select a state from the dropdown
  - b. **Choose a Category:** Select a category from the dropdown. The dropdown will be empty until you select a state from the dropdown above.
  - c. **Choose a Subcategory:** Select a subcategory from the dropdown. The dropdown will be empty until you select a state and a category from the dropdowns above.
  - d. **Give it a Nickname:** This is optional, but if it helps you remember the tax classes based on your own naming conventions you may enter a nickname here.
6. Click the **Update** button

You may choose to override the tax classes for all states or just certain ones. If a given product doesn't have its own product tax class for the state the order is being shipped to, the system will use the default product tax class from the **AccurateTax Default Product Tax Classes** screen.

## Shipping Classes

Shipping charges in your store need to be assigned a tax class in the same manner as products. To do so, go back to the main tabs by clicking the Menu button and choosing Store Settings. From there:

1. Click the **AccurateTax Enterprise** tab (which may be hidden behind the “...” button)
2. Click the **Shipping Classes** sub-tab
3. Next you need to enter one default shipping tax class for each state in which you're charging sales tax (as determined by the state checkboxes on the **General Settings** sub-tab). To add a new default product tax class, fill in the following fields:
  - a. **Choose a State:** Select a state from the dropdown
  - b. **Choose a Category:** Select a category from the dropdown; typically it will be described as delivery or postage charges. The dropdown will be empty until you select a state from the dropdown above.
  - c. **Choose a Subcategory:** Select a subcategory from the dropdown. The dropdown will be empty until you select a state and a category from the dropdowns above.
  - d. **Give it a Nickname:** This is optional, but if it helps you remember the tax classes based on your own naming conventions you may enter a nickname here.
4. Occasionally a certain shipping method (such as in-store pickup) may need a different class. If so, you can select that on a method-by-method basis under the section **Override Tax Class for Individual Methods**. If your store doesn't need this, leave them all as “Use Default”.

General Settings	Re-Download Matrices	Product Classes	<b>Shipping Classes</b>	Charge Classes												
<b>Default Tax Classes for Shipping Charges</b> Set the tax classes that will be applied to your shipping charges.																
<b>Add a New Tax Class</b> To add a new default tax class, select a state, category, and subcategory, and then click the Update button.																
Choose a State: <Select One> Choose a Category: Choose a Subcategory: Give it a Nickname (Optional):																
<b>Current Assigned Tax Classes</b> <table border="1"> <thead> <tr> <th>Remove</th> <th>State</th> <th>Nickname/Description</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>FL</td> <td>Handling, crating, packing, preparation for mailing or delivery, and similar charges</td> </tr> </tbody> </table>					Remove	State	Nickname/Description	<input type="checkbox"/>	FL	Handling, crating, packing, preparation for mailing or delivery, and similar charges						
Remove	State	Nickname/Description														
<input type="checkbox"/>	FL	Handling, crating, packing, preparation for mailing or delivery, and similar charges														
<b>Override Tax Class for Individual Methods</b> Below, if needed, you can override the default tax class for individual methods. The override will apply to all states.																
<table border="1"> <thead> <tr> <th>Module Name</th> <th>Method Name</th> <th>Tax Class</th> </tr> </thead> <tbody> <tr> <td>Flat Rate Shipping</td> <td>Flat Rate Ground</td> <td>&lt;Use Default&gt;</td> </tr> <tr> <td>Flat Rate Shipping</td> <td>Next Day Express</td> <td>&lt;Use Default&gt;</td> </tr> <tr> <td>Price Table Based Shipping</td> <td>Economy Shipping</td> <td>&lt;Use Default&gt;</td> </tr> </tbody> </table>					Module Name	Method Name	Tax Class	Flat Rate Shipping	Flat Rate Ground	<Use Default>	Flat Rate Shipping	Next Day Express	<Use Default>	Price Table Based Shipping	Economy Shipping	<Use Default>
Module Name	Method Name	Tax Class														
Flat Rate Shipping	Flat Rate Ground	<Use Default>														
Flat Rate Shipping	Next Day Express	<Use Default>														
Price Table Based Shipping	Economy Shipping	<Use Default>														

## Charge Classes

Some charges should affect sales tax, and some shouldn't. For example, shipping-related charge, such as lift gate service or residential delivery, may need to be charged as a shipping service. If this is the case,



you'll want to set the tax class for these charges. This is done on a module-by-module basis from the **Charge Classes** sub-tab.

Let's say you have a custom shipping module that may enter a charge for lift-gate service, and you want to make sure this is included appropriately. In this case, you would find the custom shipping module in the list of modules, and change its dropdown menu to the appropriate class, and then click the Update button. An example is shown below:

General Settings   Re-Download Matrices   Product Classes   Shipping Classes   **Charge Classes**

### Tax Classes for Charges

For any module that adds a charge, you can specify its tax class. If not specified, it won't be included in the tax calculation. (This does not apply to shipping charges.)

Code	Name	Tax Class
ATADV	AccurateTax Advanced	<Do Not Include>
ATENT	AccurateTax Enterprise	<Do Not Include>
customshipping	Custom Shipping Module	Delivery/Postage Charges / Transportation, shipping, postage, and similar charge ...
newtax	Add a Product	<Do Not Include>



## Address Validation Screen

During checkout, customers with addresses that need to be scrubbed and validated (based on your settings) will see an extra screen after entering their address. This screen needs to be setup in your store. During installation, the module attempted to automatically create the Address Validation page. If it was successful, you will see a page with the code **ATADDR** in the Pages section of your MIVA Merchant backend. If the page was not automatically created, you may do so manually.

### To Manually Create the ATADDR Page

1. Click the **Menu** button, then choose **User Interface**.
2. Search for the page with the code ATADDR. If it exists, you do not need to manually create it. If it does not, continue with these instructions.
3. Click the “+” button to add a new page.
4. Enter ATADDR for the code, AccurateTax Address Validation as the name (you may modify this if desired) and in the template box, enter the code from one of the following two files that came with your module.
  - a. If your store uses the MMUI interface, copy the template code from the file **mmui\_ATADDR.mvt** into the template box.
  - b. If your store uses the CSSUI interface, copy the template code from the file **cssui\_ATADDR.mvt** into the template box.
- If you do not know which interface your site uses, click the Menu button, then choose Store Settings. Look for the text next to the label **Store User Interface**. If it says **Miva Merchant Look & Feel**, then you are using the MMUI interface. If it says **Miva Merchant CSSUI**, then you are using the CSSUI interface.*
5. Click the **Add** button.

### If Your ATADDR Page Already Exists

If your ATADDR page already exists, or after you've added it, you may modify the HTML for the template, as long as you don't change the forms and their input tags in the template. You may also assign any additional items as needed.

## Testing Your AccurateTax Module

To test your configuration, go to your storefront and add at least one taxable product to your shopping cart. Begin the checkout process, and make sure to enter a US-based address in one of the states you assigned as a taxable state in **General Settings** above.

Once you've entered your shipping and billing addresses, when you click the Continue button, you should see the new ATADDR screen. It should look something like the screenshot below, although the formatting of the page around the addresses may differ if you've customized your global header/footer or the ATADDR page itself.

**Address Verification**

We could not find the exact address you entered, but similar address(es) are listed on the right. Please indicate which address is correct, or you may choose to edit your original address.

**Original**

Susan Petracco  
2460 N. Courtenay Pkwy #202  
Merritt Island, FL 32955-6760  
US

[Edit](#) [Use This Address](#)**Recommended**

Susan Petracco  
2460 N COURTENAY PKWY  
STE 202  
MERRITT ISLAND, FL 32953-4192  
US

[Use This Address](#)

In certain cases, there may be multiple addresses under the **Recommended** column. Click the **Use this Address** button under any address in the **Recommended** column to continue to the normal Shipping and Payment Selection (OSEL) screen. On that screen, you should see the scrubbed address in the **Ship To** column. Scrubbed addresses always use all capital letters and have a 9-digit zipcode.

[Home](#) | [All Products](#) | [Account](#) | [Basket](#) | [Search](#) | [Checkout](#)

**Shipping/Payment Selection**

Ship To:	Bill To:
Name: Susan Petracco Email Address: spetracco@netblazon.com Phone Number: 3215015290 Fax Number: Company: AccurateTax Address: 2460 N COURTENAY PKWY STE 202 MERRITT ISLAND, FL 32953-4192 US	Name: Susan Petracco Email Address: spetracco@netblazon.com Phone Number: 3215015290 Fax Number: Company: AccurateTax Address: 2460 N. Courtenay Pkwy #202 Merritt Island, FL 32955-6760 US

Item	Qty.	Item Price	Total Price
Shirt - shirt color: red size: small	1	\$20.00	\$20.00
			Total: \$20.00

Ship Via:

Pay With:

[Continue](#)

Choose any payment and shipping options, then click the continue button to proceed to the Order Payment Information (OPAY) screen. There you should see a sales tax charge in your shopping cart.



## Payment Information

### Ship To:

Name: Susan Petracco  
Email Address: spetracco@netblazon.com  
Phone Number: 3215015290  
Fax Number:  
Company: AccurateTax  
Address: 2460 N COURtenay PKwy  
STE 202  
MERRITT ISLAND, FL 32953-  
4192  
US

### Bill To:

Name: Susan Petracco  
Email Address: spetracco@netblazon.com  
Phone Number: 3215015290  
Fax Number:  
Company: AccurateTax  
Address: 2460 N. Courtenay Pkwy #202  
Merritt Island, FL 32955-6760  
US

Item	Qty.	Item Price	Total Price
Shirt- shirt  color: red  size: medium	1	\$20.00	\$20.00
		<i>Shipping: Ground:</i>	\$6.95
		<i>Sales Tax:</i>	\$1.62
		<b>Total:</b>	<b>\$28.57</b>

### Payment Method: Check

**Bold** = Required  
*Italic* = Optional

Check #:

[Continue](#)

At this point, once you see the sales tax charge, your sales tax module is working.

For support, please visit <https://www.accuratetax.com/help/>