

AccurateTax Installation for OpenCart 2.0

1. Using an FTP utility, upload new files to your server via FTP. The new files are:

```
admin/controller/total/accuratetax.php
admin/language/english/total/accuratetax.php
admin/view/template/total/accuratetax.tpl
catalog/controller/checkout/accuratetax.php
catalog/model/total/accuratetax.php
catalog/view/theme/default/template/checkout/ataddress.tpl
catalog/view/javascript/accuratetax.js
```

2. If you have not made any changes to the following files, you may overwrite them with the AccurateTax versions. If you have, you will need to merge your code edits with ours. There are comments in both files indicating the AccurateTax code changes.

```
catalog/controller/checkout/checkout.php
catalog/controller/checkout/success.php
```

checkout.php has one block of additional code for AccurateTax, while **success.php** has two blocks.

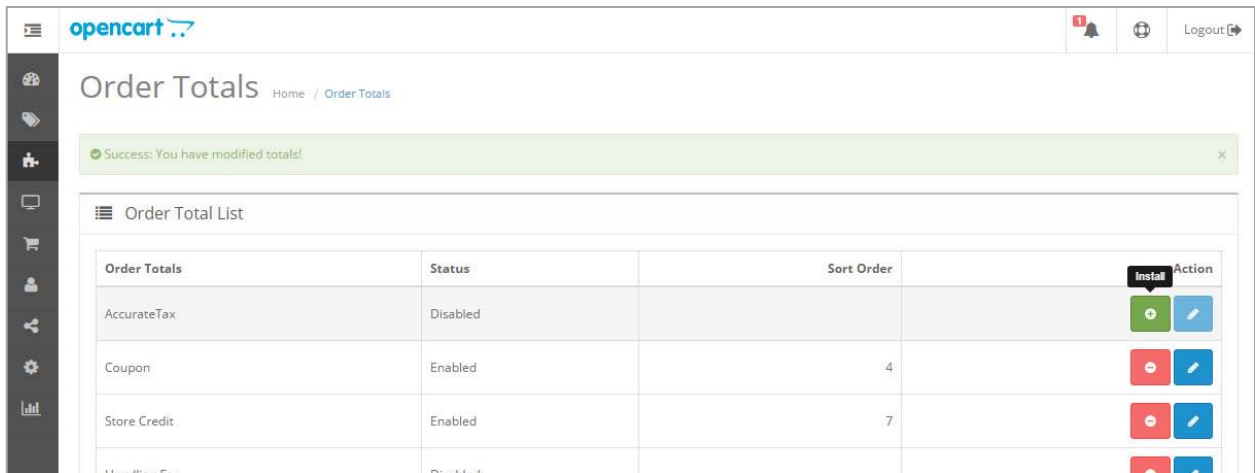


NOTE: It is highly recommended that you make a backup of these two files prior to adding our code or overwriting the originals.

3. Log into your OpenCart 2.0 administration back-end.
4. Navigate to Extensions > Order Totals. The extensions icon looks like this:



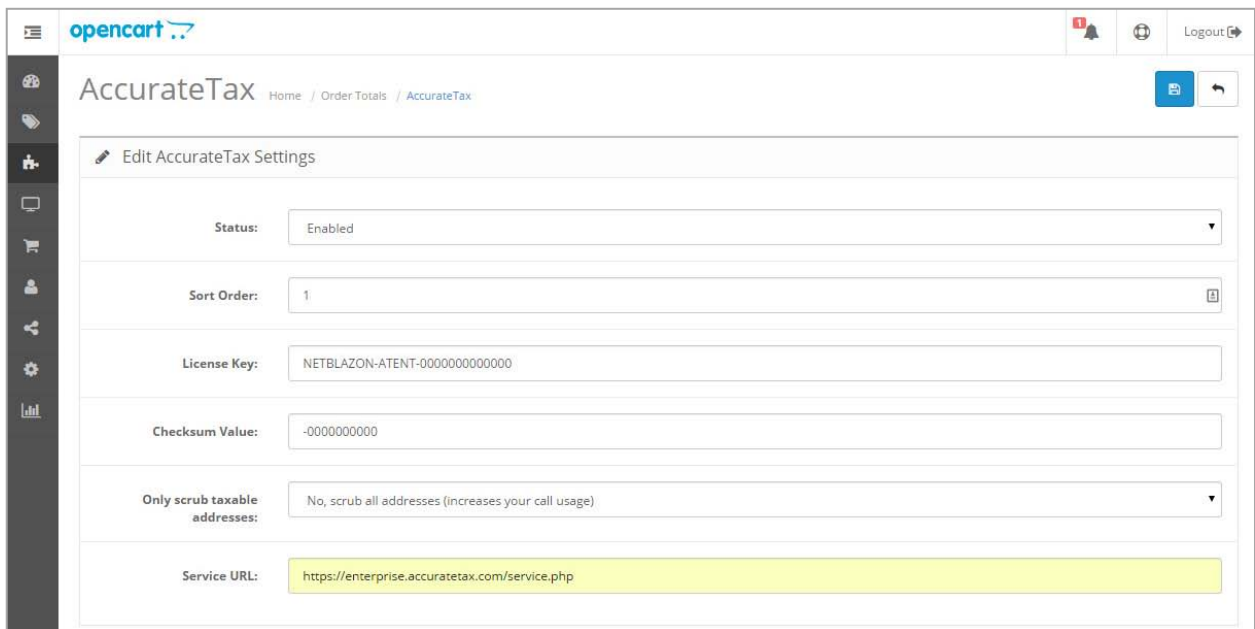
5. Click the Install button (green button with a “+” icon) next to AccurateTax



The screenshot shows the OpenCart administration interface. The top navigation bar includes the OpenCart logo, a notification bell, a globe icon, and a Logout button. The main heading is "Order Totals" with a breadcrumb trail "Home / Order Totals". A green success message states "Success: You have modified totals!". Below this is the "Order Total List" table:

Order Totals	Status	Sort Order	Action
AccurateTax	Disabled		Install + ✎
Coupon	Enabled	4	- ✎
Store Credit	Enabled	7	- ✎
Headline Fee	Disabled		- ✎

6. Click the Edit button (blue button with a pencil icon) next to AccurateTax
7. Make the following edits on the next screen:
 - a. Change the Status dropdown to Enabled
 - b. Change the Sort Order to 1 (may be adjusted as needed)
 - c. Enter your License Key
 - d. Enter your Checksum
 - e. Choose whether to scrub all addresses, or only addresses in taxable states
 - f. Enter your service URL. The default value is:
<https://enterprise accuratetax.com/service.php>



The screenshot shows the "Edit AccurateTax Settings" page in the OpenCart administration interface. The top navigation bar includes the OpenCart logo, a notification bell, a globe icon, and a Logout button. The main heading is "AccurateTax" with a breadcrumb trail "Home / Order Totals / AccurateTax". The page contains the following settings:

- Status: Enabled
- Sort Order: 1
- License Key: NETBLAZON-ATENT-00000000000000
- Checksum Value: -0000000000
- Only scrub taxable addresses: No, scrub all addresses (increases your call usage)
- Service URL: <https://enterprise accuratetax.com/service.php>

8. Click the Save button (blue button in the upper right with a floppy disk icon)

9. You should be returned to the Extensions > Order Totals screen. From here, click the Edit button next to Taxes.

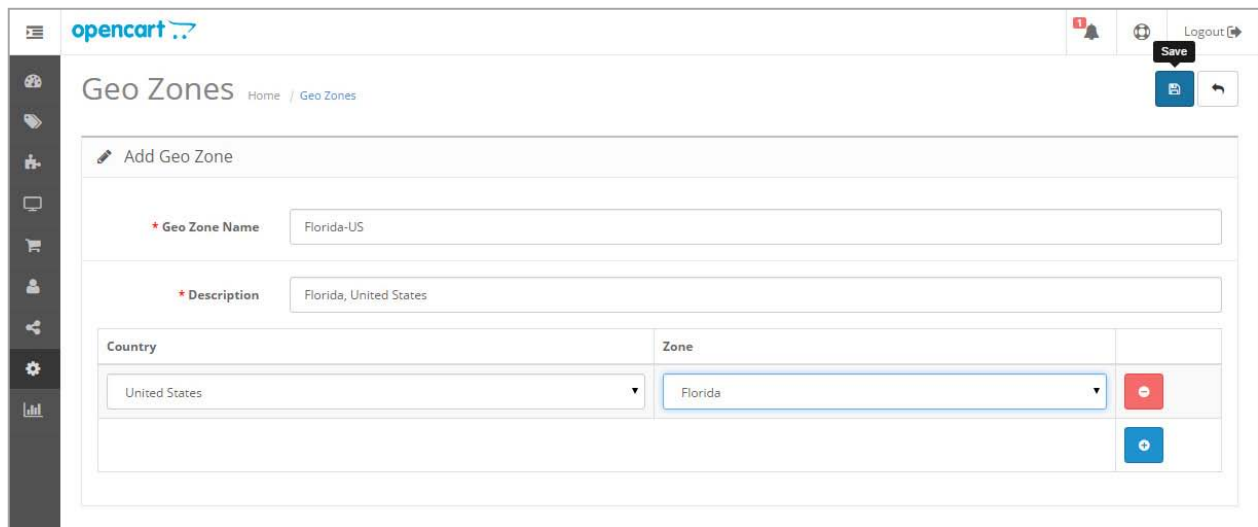
10. Change the dropdown for Status to Disabled, and click the Save button.

11. Navigate to System > Localisation > Geo Zones. The System icon looks like this:



12. Here you will need to create a zone for each state where you wish to charge sales tax, as follows:

- a. Click the Add button (blue button with “+” icon in the upper right)
- b. Enter a Geo Zone Name and Description. For example, you may wish to enter:
Geo Zone Name: Florida-US
Description: Florida, United States
- c. In the section below the name and description, you need to configure the zone. To do so, click the Add button in this section (blue button with “+” icon).
- d. Choose United States from the Country dropdown, and from the Zone dropdown, choose the applicable state.
- e. Click the Save button in the upper right corner (blue button with floppy disk icon)
- f. Repeat steps a-e for any other states where you need to charge sales tax.



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Geo Zones Home / Geo Zones

Save

Logout

Add Geo Zone

* Geo Zone Name Florida-US

* Description Florida, United States

Country	Zone	
United States	Florida	-
		+

13. Navigate to System > Localisation > Taxes > Tax Rates. Here you will need to create one entry for each state where you wish to charge sales tax, as follows:
- Click the Add button (blue button with “+” icon in the upper right)
 - Enter the following values:
 - Tax Name – a descriptive name that will display in the shopping cart when the tax is applied. For example, you could enter “Florida Sales Tax”.
 - Tax Rate – enter a fallback rate for your state. This will only be used if a shopper enters an address that cannot be scrubbed or located.
 - Type – leave as Percentage
 - Customer Group – usually this applies to Default
 - Geo Zone – select the Geo Zone you created for this state in step 11
 - Click the Save button in the upper right corner (blue button with floppy disk icon)

The screenshot displays the OpenCart administration interface for the 'Tax Rates' section. The page title is 'Tax Rates' with a breadcrumb trail 'Home / Tax Rates'. A sidebar on the left contains navigation icons. The main content area is titled 'Add Tax Rate' and contains a form with the following fields:

- * Tax Name:** Florida Sales Tax
- * Tax Rate:** 6
- Type:** Percentage
- Customer Group:** Default
- Geo Zone:** Florida-US

At the top right of the form area, there are two blue buttons: one with a plus sign (+) and another with a floppy disk icon, representing the 'Add' and 'Save' actions respectively.

14. Navigate to System > Localisation > Taxes > Tax Classes. Here you will apply the tax rates you created to applicable tax classes.
- Click the Edit button (blue button with pencil icon) next to Taxable Goods.
 - Click the Add Rate button (blue button with “+” icon)
 - Under Tax Rate, choose the tax rate you created in Step 12.
 - Under Based On, generally you will choose Shipping Address. However, if this is for a state where you would have origin-based sourcing, choose Store Address.
 - For Priority, enter the value 1.
 - Click the Save button in the upper right corner (blue button with floppy disk icon)

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Home / Tax Classes

Edit Tax Class

* Tax Class Title Taxable Goods

* Description Taxed goods

Tax Rate	Based On	Priority	
Florida Sales Tax	Shipping Address	1	-
Eco Tax (-2.00)	Shipping Address	2	-
VAT (20%)	Shipping Address	1	-
			+

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