GJC Web Design VM2.6/3.0

TaxCloud Plugin

Thank you for buying our VM Taxcloud Plugin!

This plugin retrieves the required tax from Taxcloud and submits the collected amounts to your TaxCloud account.

Dedicated test site at
http://test.gjcwebdesign.com/vm2t9

Login with testshopper/testshopper

Getting your api ids:

USPS:

This is for the address validation

~~Create or login to your USPS.com account and sign up for a Web Tools User ID. You can find it in a box on the right hand side of the page at http://www.usps.com/webtools/ entitled "Access USPS Web Tools".~~

~~Once you have received your email with your Web Tools User ID in it, contact USPS personally and request access to the production server by email (icustomercare@usps.com) or phone (1-800-344-7779) because the requests Virtuemart sends out will not work at all in testing or production mode if USPS does not grant you access personally. Tell them that you are using Virtuemart which has been tested with their systems already.~~

~~https://secure.shippingapis.com/registration/~~

This seems to be not needed now .. If you just enter a 1 in the USPS API Key field it works. :)

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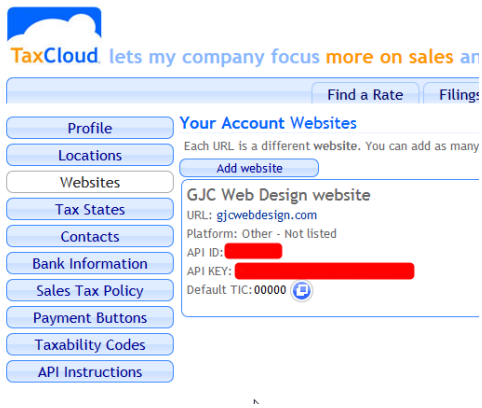
TaxCloud Plugin

TaxCloud;

Go to https://taxcloud.net/account/register/ and signup for membership - this is completely free as is their service - the States themselves pay TaxCloud for this service.

Select "Virtuemart" for the "Shopping cart" Once you have completed the registration process and entered your website details you will find your API ID and API KEY under the Websites button.



PLEASE NOTE:
Even though TaxCloud uses the avalara VM calculation math operation name it has nothing to do with Avalara. The Avalara plugin MUST be disabled in the Joomla Plugins!

Name	Description	Ordering	Type of Arithmetic Operation	Math Operation	Value	Currency
USA Local State Taxes	California Sales Tax	0	TaxBill	avalara	0.0000	United States dollar

All shipping and payment methods MUST have their Tax set to 'Apply the default rules'!
No other vmcalculation plugins can be enabled.. ONLY TaxCloud.

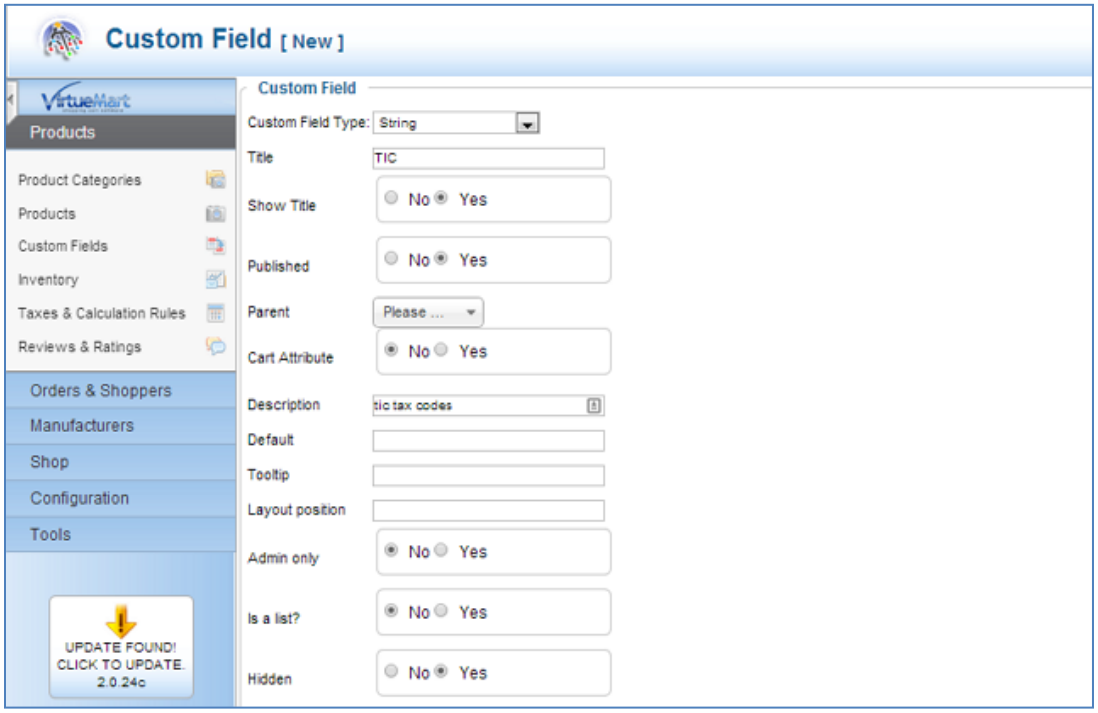
The shopper field 'zip' should have its Max Length set to 5 : Zip+4 codes are added automatically by the USPS look up.

Taxability Information Codes (TICs)

The plugin sends the default TIC if none is set. Only setup TICs for your products if they belong to a group that is not the default 00000 group.

Shipping and Payment fees you might charge automatically get their correct TIC codes.
Configure a new Custom Field as below.

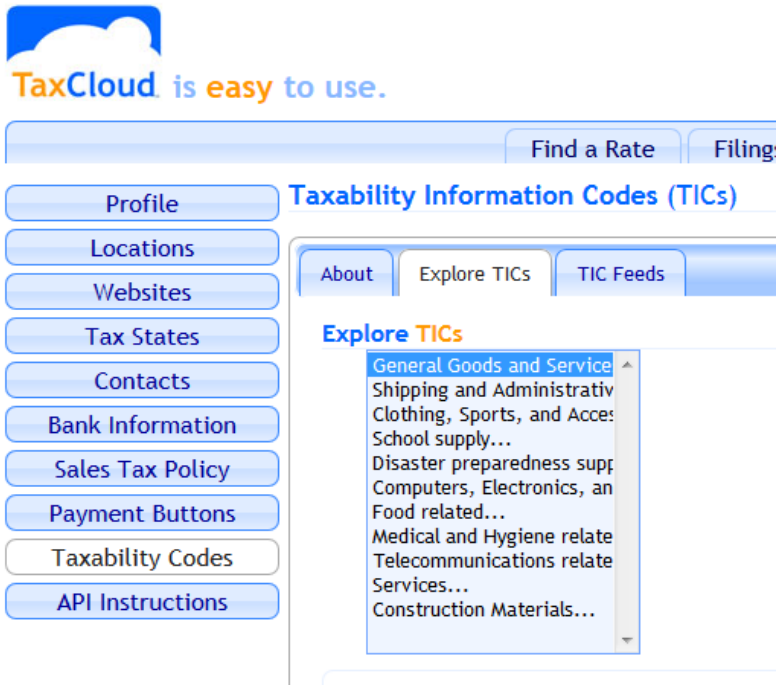
The title MUST be TIC!!!



A full searchable list is available from your TaxCloud Account.

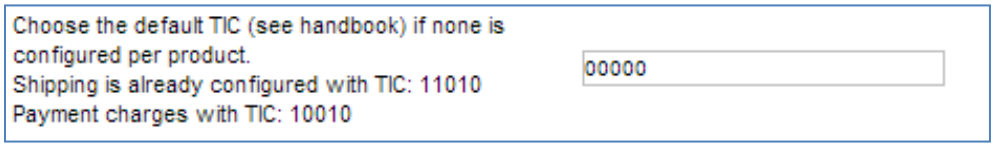
If your site deals with a majority of goods in a particular TIC category then use this as your default value above. Otherwise the default in the VM TaxCloud plugin Default TIC Setting will be used.

00000 = General Goods and Services (uncategorized/undefined)



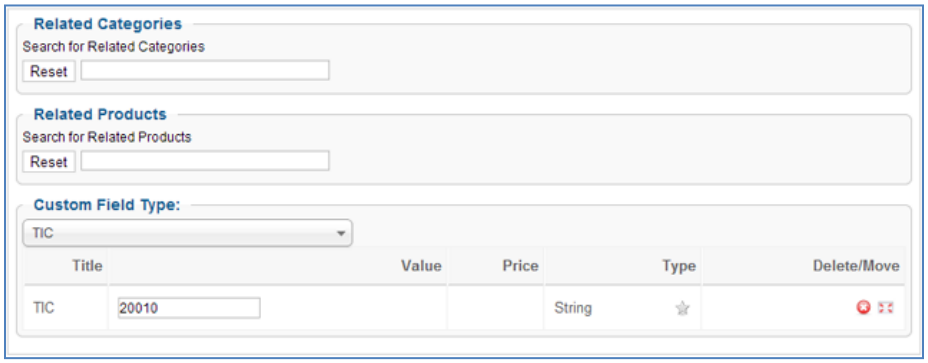
Then for each product if required define your TIC.

If no id is configured then the code is what was chosen in the TaxRule config (see below) will be used.



Shipping is already configured with TIC: 11010

Payment Fees are already configured with TIC: 10010 (admin services)



Installing and configuring:

The plugin installs as a native Joomla Plugin - just install and enable. Unzip the file you received and choose the right plugin for your VM version (Vm2.6 or VM3(both J3 & J2.6))

Your version of VM must be greater than VM3.0.10 (and it should be VM3.0.12) .

If so install version VM_taxcloud_3.0.13_VM3.0.10.zip .
This is tested working on VM version 3.0.9.6+ -> 3.0.12. This is the latest test stable.
So effectively the minimum it will work on is VM3.0.9.6

if using a version less than 3.0.9.6 then install VM_taxcloud_3.0.2_VM3.0.8.zip

With version VM3.0.9, VM3.0.9.2 up to VM3.0.9.4 there is a bug that stops the TaxCloud plugin from accessing the shipping charge : this is fixed in later VM3.0.9.4 versions

If you are using any of the VM3.0.9.6 and + versions you must make a core change in the file components\com_virtuemart\views\cart\tmpl\default_pricelist.php line 185: comment out the code:

```
#if($rule['calc_value_mathop']=='avalara') continue;
```

This enables the display

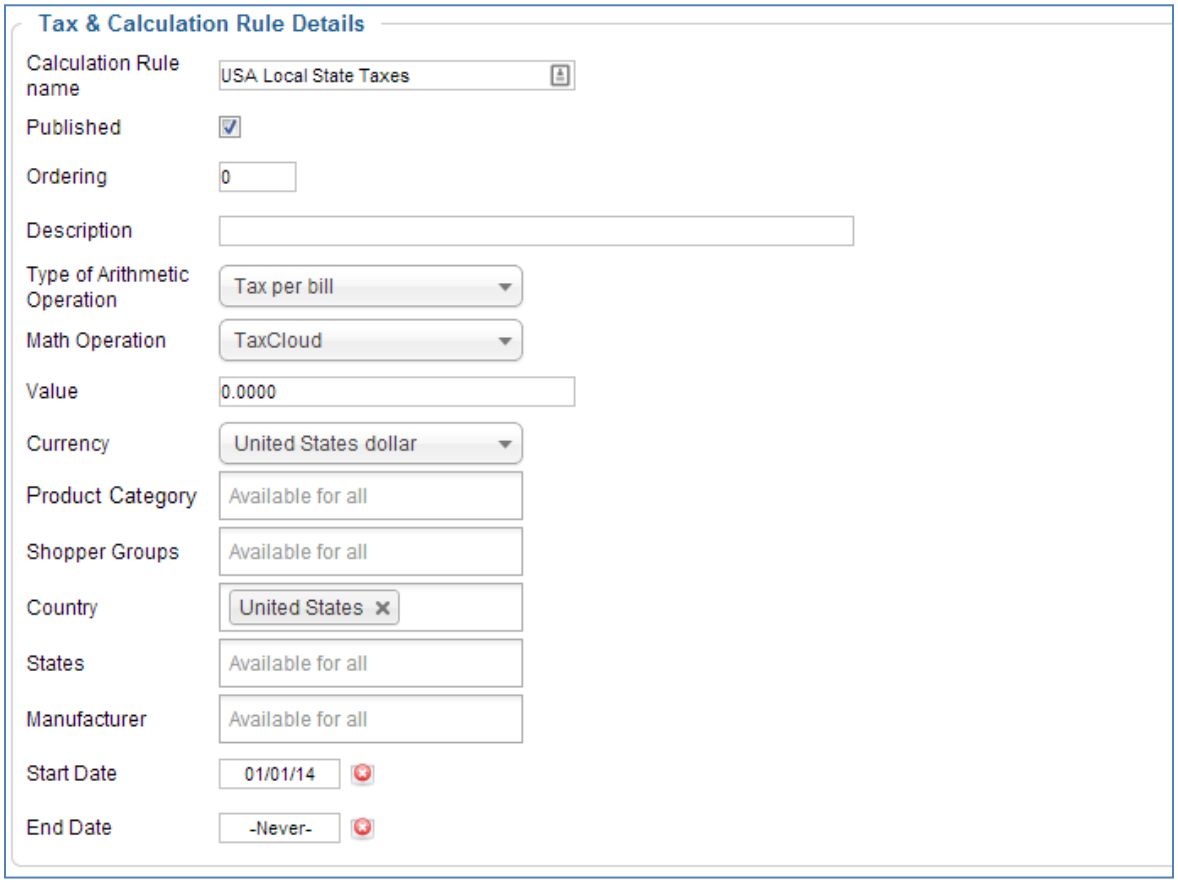
```
184  foreach ($this->cart->cartData['taxRulesBill'] as $rule) {
185      #if($rule['calc_value_mathop']=='avalara') continue;
186      ?>
```

If you are re-installing on an existing VM3 and you are using the VM_taxcloud_3.0.13_VM3.0.10 **version, install as per normal but then you MUST go back to the Tax config and reset the Math Operation to TaxCloud (it will have flipped back to +)**

Then save the page again

Then under the VM administration make a new "Taxes and Calculations" Rule.

Now make a new Tax rate as set out below.



You can leave the States setting to "Available for all" because the plugin takes the settings from your TaxCloud account. There you specify exactly which states you want to collect tax from.

You can still use the state selector above if you want to disable the display of taxes in the cart for states you don't collect from.

Underneath these fields you will find the VM TaxCloud configuration.

Fill in the 3 codes you have from Taxcloud and USPS.

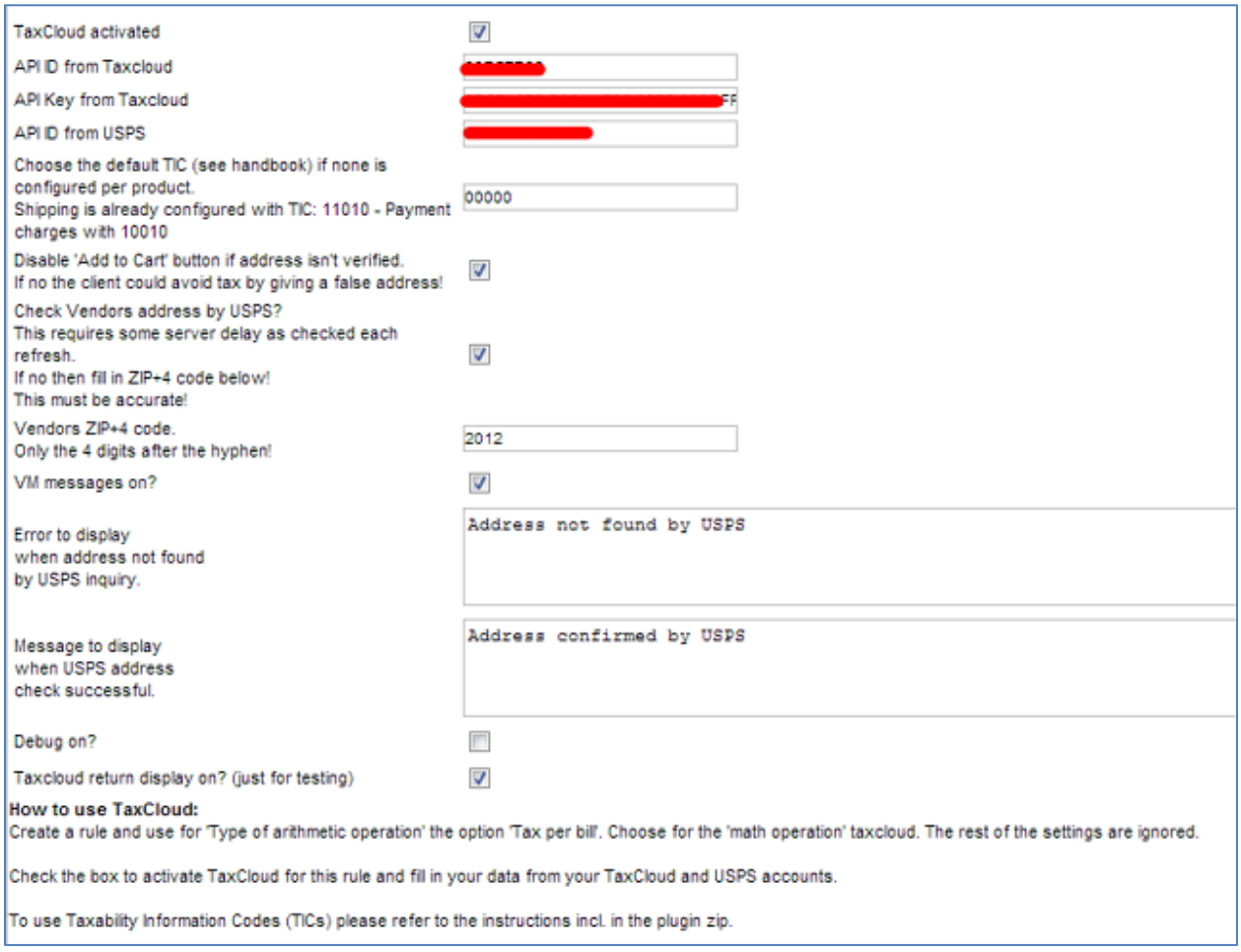
Choose your default TIC - normally 00000 - General Goods and Services

The Checkout button can be disabled unless your customers address is properly validated by USPS.

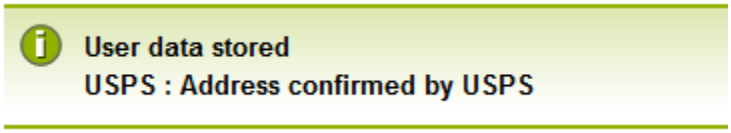
You can add your last 4 digits ONLY of your own (store address) Zip+4 zipcode - this avoids one lookup and can be a little faster - it must be correct!

You should show the VM messages (Address not found etc) so your customer knows what is happening.

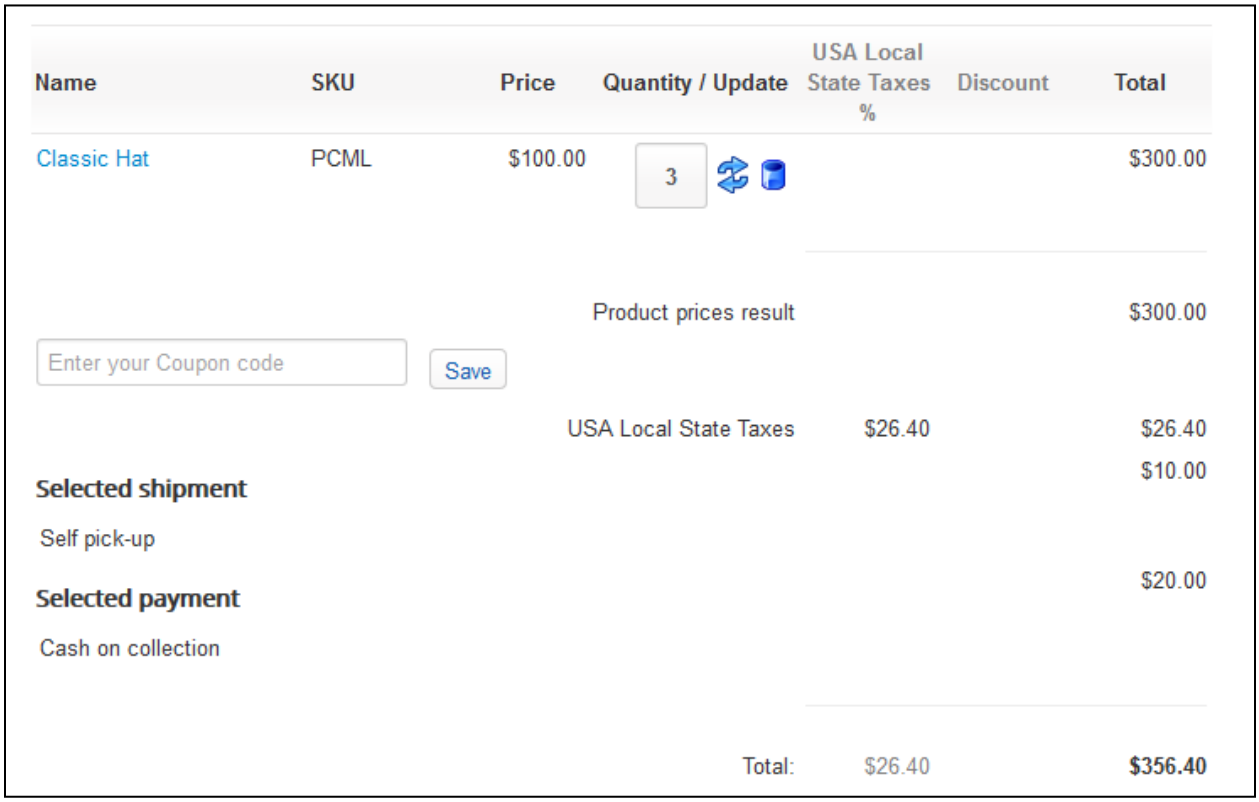
Then choose your messages and set during testing the debug and display on so you can see it all working. That's it! The rest is all automatic.



When your customer gets to the cart and fills out his address and/or shipping address first Taxcloud will validate this address. If all Ok the validation message will show and the tax will be retrieved.



The tax is displayed in the cart and the customer can checkout.



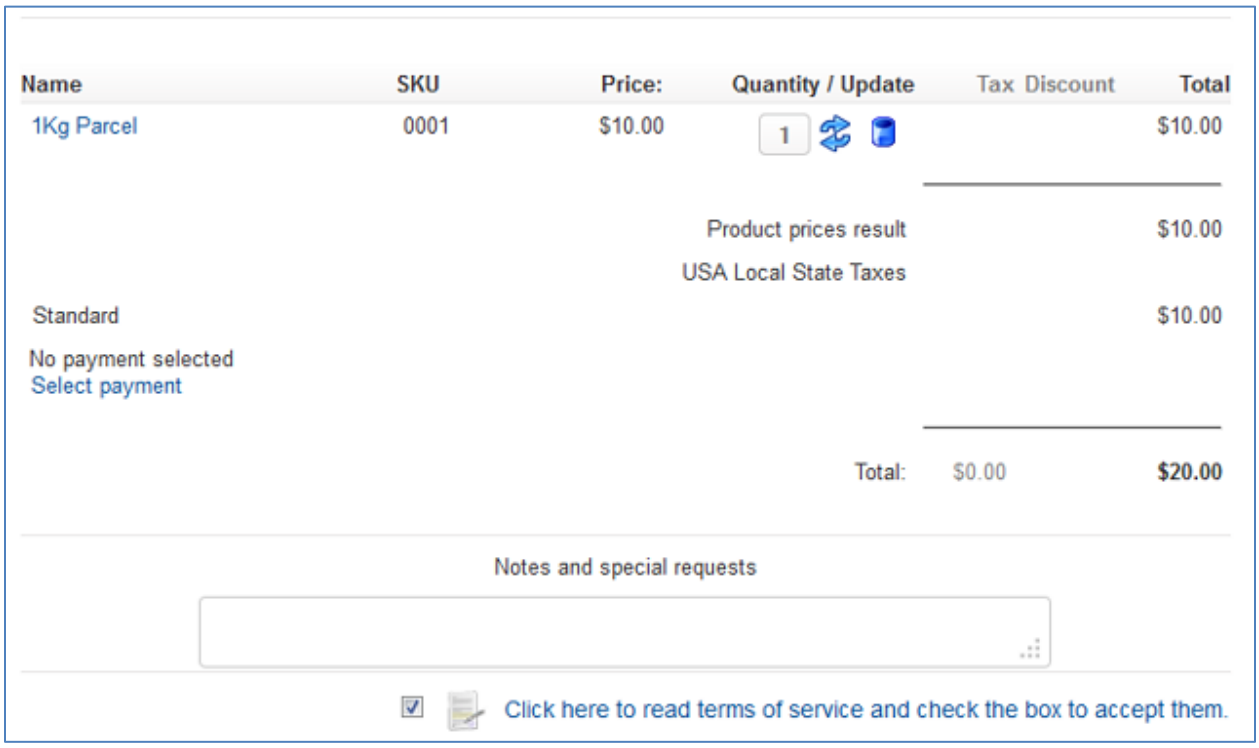
In this case the product is $10.00, shipping is $10.00 and a payment fee of $2.00 is charged.

The address is in Texas and TaxCloud calculates the following taxes.

Item 0 Tax = $24.75
Payment/Service Charge Tax = $1.65
Shipping Tax = $0 (exempt from tax in this state)
For a total of $26.40

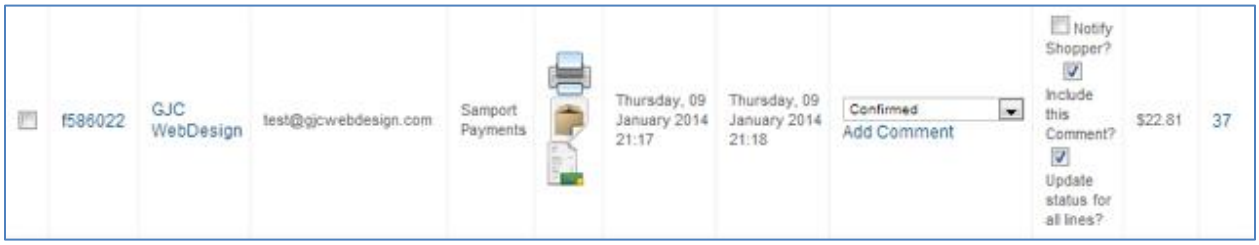
If the address isn't validated the message is shown:

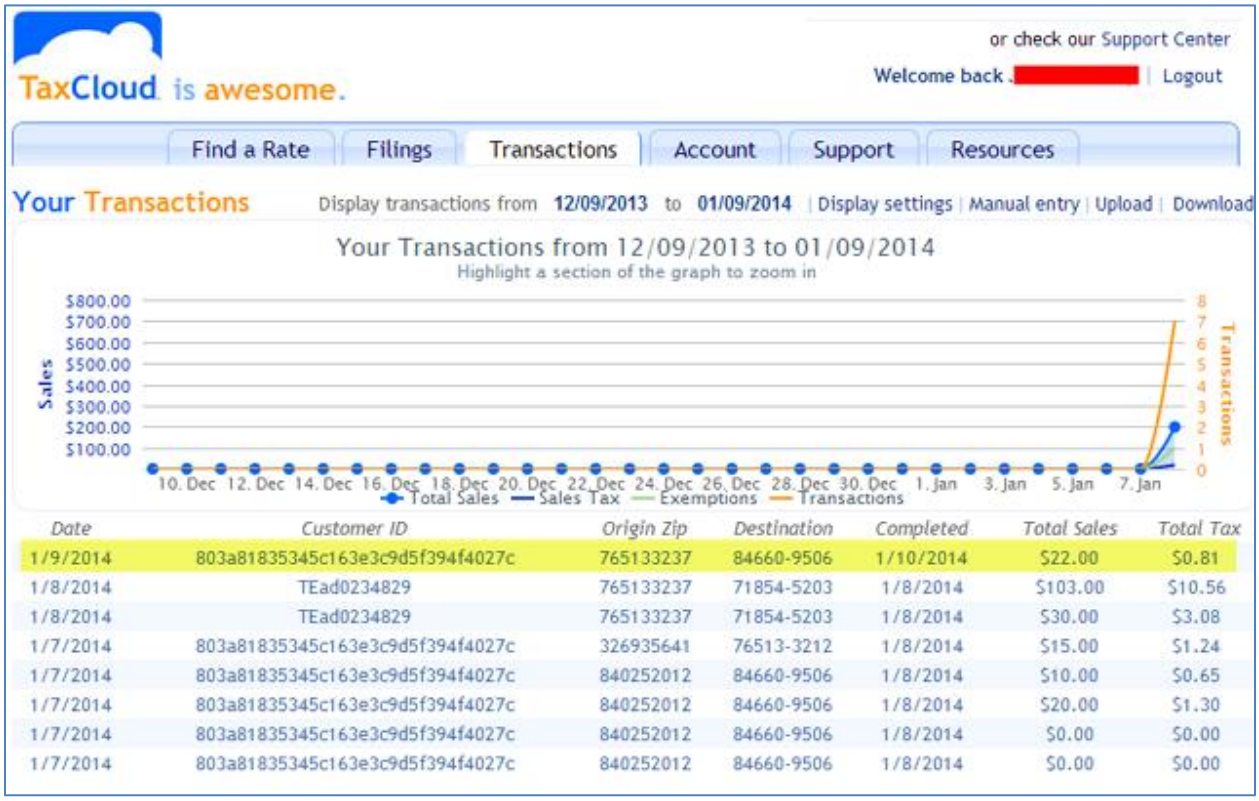
And the checkout button isn't shown until the address is corrected.



After validation the customer checks out as normal.

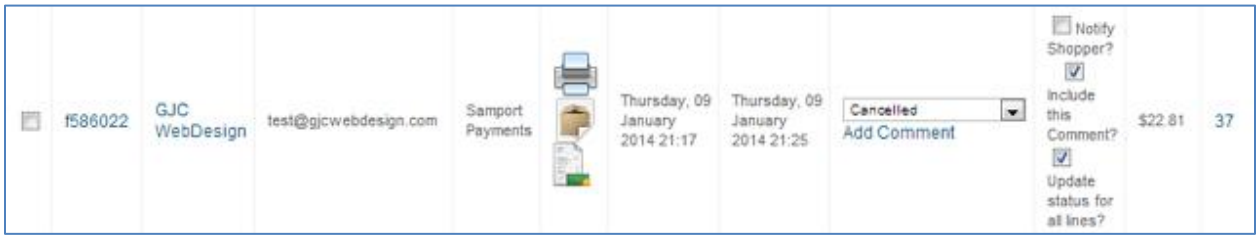
The tax is stored with the order in Virtuemart and shown in the invoices etc. When the order is confirmed either manually in the Virtuemart admin or by the payment plugin in the normal way the information is sent to TaxCloud where it is immediately available in your account under the "Transactions" menu.

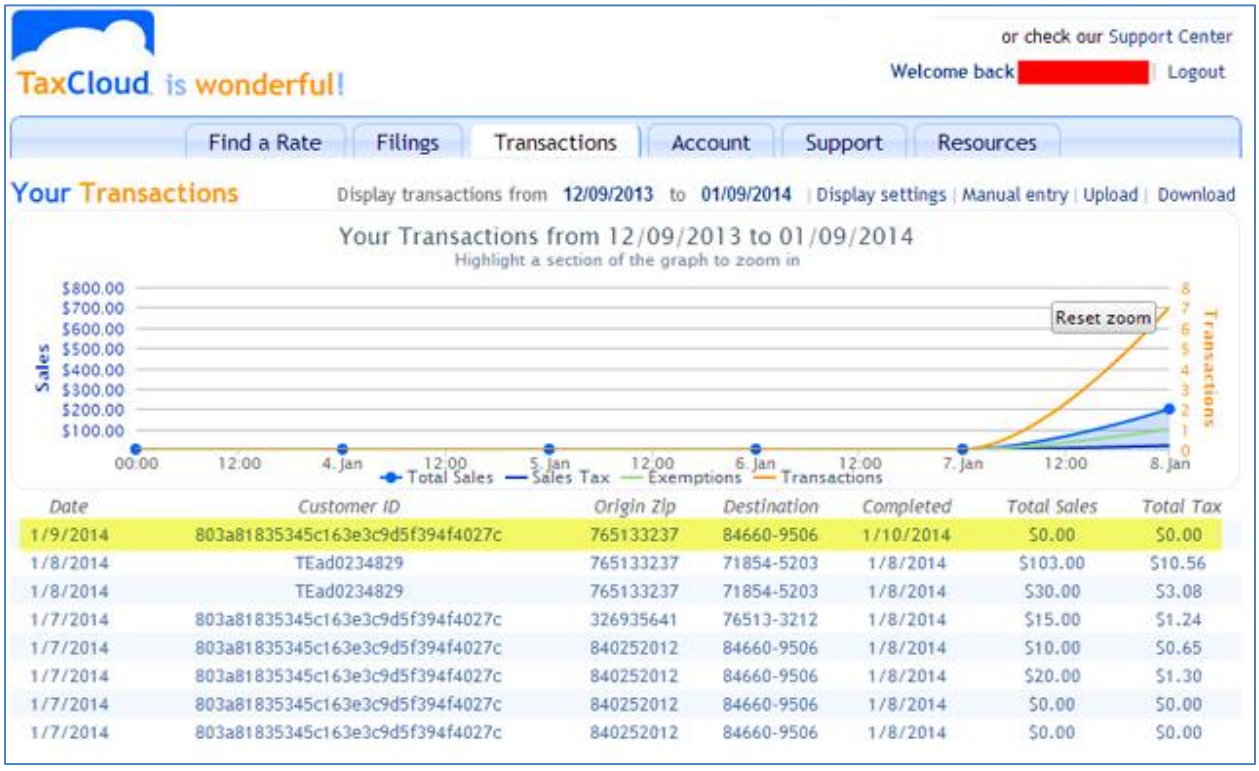




It is as painless as that!

If the goods are returned or the order cancelled etc this is also handled automatically.
When the order is set to cancelled and Saved in the Virtuemart admin the tax is also deleted from the TaxCloud transactions.


f586022
GJC WebDesign
test@gjcwebdesign.com
Samport Payments
Thursday, 09 January 2014 21:17
Thursday, 09 January 2014 21:25
Cancelled
Add Comment
Notify Shopper?
Include this Comment?
Update status for all lines?
$22.81
37


TaxCloud is wonderful!
or check our Support Center
Welcome back
Logout
Find a Rate
Filings
Transactions
Account
Support
Resources
Your Transactions
Display transactions from 12/09/2013 to 01/09/2014
Display settings | Manual entry | Upload | Download
Your Transactions from 12/09/2013 to 01/09/2014
Highlight a section of the graph to zoom in
Reset zoom
Sales
Transactions
Total Sales
Sales Tax
Exemptions
Transactions
Date
Customer ID
Origin Zip
Destination
Completed
Total Sales
Total Tax
1/9/2014 803a81835345c163e3c9d5f394f4027c 765133237 84660-9506 1/10/2014 $0.00 $0.00
1/8/2014 TEad0234829 765133237 71854-5203 1/8/2014 $103.00 $10.56
1/8/2014 TEad0234829 765133237 71854-5203 1/8/2014 $30.00 $3.08
1/7/2014 803a81835345c163e3c9d5f394f4027c 326935641 76513-3212 1/8/2014 $15.00 $1.24
1/7/2014 803a81835345c163e3c9d5f394f4027c 840252012 84660-9506 1/8/2014 $10.00 $0.65
1/7/2014 803a81835345c163e3c9d5f394f4027c 840252012 84660-9506 1/8/2014 $20.00 $1.30
1/7/2014 803a81835345c163e3c9d5f394f4027c 840252012 84660-9506 1/8/2014 $0.00 $0.00
1/7/2014 803a81835345c163e3c9d5f394f4027c 840252012 84660-9506 1/8/2014 $0.00 $0.00

If some items need to be cancelled from a mixed order this is also possible but requires a small simple code change (to introduce a trigger) in administrator/components/com_virtuemart/models/orders.php

find
function public function updateSingleItem($virtuemart_order_item_id, &$orderdata, $orderUpdate = false)

just before the line $dataT = get_object_vars($table);
add:

```
/*GJC TAXCLOUD HACK*/
JPluginHelper::importPlugin('vmcalculation');
$_dispatcher = JDispatcher::getInstance();
$_returnValues = $_dispatcher-
>trigger('plgVmOnUpdateSingleItem',array($table,&$orderdata));
/*GJC TAXCLOUD HACK*/
```

Should look like:

```
390  //      $_returnValues = $_dispatcher->trigger('plgVmOnUpdateSingleItem',array($table,&$orderdata));
391  */
392  /*GJC TAXCLOUD HACK*/
393  JPluginHelper::importPlugin('vmcalculation');
394  $_dispatcher = JDispatcher::getInstance();
395  $_returnValues = $_dispatcher->trigger('plgVmOnUpdateSingleItem',array($table,&$orderdata));
396  /*GJC TAXCLOUD HACK*/
397         $dataT = get_object_vars($table);
```

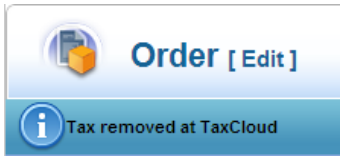
I am happy to do this for you or to supply a pre changed orders.php

The individual item is then removed from TaxCloud:

Date	Customer ID	Origin Zip	Destination	Completed	Total Sales	Total Tax
1/14/2014	803a81835345c163e3c9d5f394f4027c	76513201 2	84660-9506	1/14/2014	$25.00	$1.35

Transaction Date: 1/14/2014 Taxable: Mixed Website: GJC TaxCloud verification
Authorize Date: 1/14/2014 Cart/Order ID: e90e08
Destination: 84660-9506 Customer ID: 803a81835345c163e3c9d5f394f4027c

Item Identifier	TIC	Tax Rate	Quantity	Price/Item	Tax Amount
0002	0	0.06750	1.0000	$20.00	$1.35
0005	0	0.06750	1.0000	$10.00	$0.68
shipping	11010	0.00000	1.0000	$5.00	$0.00
0005	0	0.06750	1.0000	($10.00)	($0.68)



Debugging

Debugging is available - just switch it on in the VM Taxcloud admin if you want to check what is happening.

e.g

```
[cartID] => 52cf0fa64515c
[cartItems] => Array
    (
        [0] => CartItem Object
            (
                [ItemID:CartItem:private] => 0001
                [Index:CartItem:private] => 0
                [TIC:CartItem:private] => 20010
                [Price:CartItem:private] => 10
                [Qty:CartItem:private] => 1
            )

        [1] => CartItem Object
            (
```

Support

Remember we are here to help - any questions or problems just email us on webmaster@gjcwebdesign.com

We pride ourselves on our support!

If you would like to leave a review at http://extensions.joomla.org/extensions/extension/extension-specific/virtuemart-extensions/taxcloud-for-virtuemart we would being very grateful.

It makes a huge difference to other users perception of the extension.

Regards

John

Founder/Owner GJC Web Design