

Installation Guide

January 19, 2006

Tax by Tax Table – v1.0 For Retail Pro® v8.51 and Above

Overview

M&M's Tax by Tax Table modification uses a tax table for calculating sales tax rather than the internal RPro tax calculation.

Everything needed for installation is provided in the MMTaxTable-VVvv.zip file. (VVvv is the version number).

This modification should be installed at the Main and/or each Remote that requires sales tax by tax table. The tax set up is done at the Main and/or each Remote that is using the modification.

Licensing

M&M's Tax Table mod is licensed by User ID and number of inventories. The license must be for the Retail Pro User ID and total number of inventories (regardless of the number of stores where it will be used).

When you receive the license file, it should be installed in the 'plugins' directory under the 'Retail' directory. M&M recommends that you also keep a copy of the original license file in another directory on the end-user's system.

The Scanner Interface License File will be named MME-MMTAXTABLE-[UserID]-[FileCode].lic.

If you are installing the modification for evaluation or demonstration using dealer key 1001 or 1888, no license file is required.

Installation at Mains and Remotes

Use the contents of the MMTaxTable-VVvv.zip file.

The MM MMTaxTable-VVvv.zip file contains:

- MMTaxTable.bpl – The Tax Table plugin.
- MMTaxTable.bmp – Bitmap file.
- Tax Table Install Guide – This installation manual.
- Tax Table User Manual – User manual.

1. Install Files

MMTaxTable.bpl and MMTaxTable.bmp

If there is no 'plugins' directory under the Retail directory on the target system, create one.

Extract the MMTaxTable.bpl and MMTaxTable.bmp files from the zip and copy to the **plugins directory**.

2. Copy License File

Copy the end-user license file to the plugins directory.

M&M recommends that you also keep a copy of the original license file in another directory on the user's system.

The license file is emailed to you when you purchase a license on the M&M web site.

You do not need a license file for dealer keys 1001 and 1888.

3. Check Desktop Shortcuts

If Retail Pro is started using a desktop shortcut, do the following at the Main and EVERY workstation on the Main:

- 1) Right click the shortcut on the desktop.
- 2) Click Properties.
- 3) Check the "Start In" directory for the shortcut. If it is not set to the location of the Retail directory, change it. Enter the full path (using drive letter) to the Retail directory.

NOTE: On workstations, the path must use the mapped network drive from the workstation to the Main or Remote server.

4. Modify Screen Designs

The modification operates by changing the tax percentage for each line item on the Receipt or Sales Order so that the tax amount is correct according to the Tax Table. When this is done, the normal tax percentage field on the Receipt or Sales Order will not contain the correct tax percentage.

To compensate for this, a custom field with the correct tax percentage has been added to Receipt and Sales Order screens. In cases where the tax table is NOT being used, the field will contain the normal Retail Pro tax rate for the tax area.

To modify the screen designs, open the page designer and locate the "Tax %" field with a high field number (like 2890). Drag this field onto the screen.

5. Change Receipt and Sales Order Document Designs

The modification operates by changing the tax percentage for each line item on the Receipt or Sales Order so that the tax amount is correct according to the Tax Table. When this is done, the normal tax percentage field on the Receipt or Sales Order will not contain the correct tax percentage.

To compensate for this, a custom field with the correct tax percentage has been added to Receipt and Sales Order documents. In cases where the tax table is NOT being used, the field will contain the normal Retail Pro tax rate for the tax area.

In order to get this field to print, Receipt and Sales Order document designs must be modified to change the Tax Percent field associated with the document header. Any tax percent fields at the item level should be removed.

To change the document designs:

Open the Receipt or Sales Order document in Document Designer.

Locate the Tax Percent field in the document header and select it.

Click the Properties tab on the right side of Document Designer.

Change the Data Field Name to TxTblPrc.

Here is a screen shot of a Receipt document design with the new data field name:

