



Magento 2.0 Implementation Guide

November 2016

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About Vertex SMB

Vertex SMB, a business division of Vertex Inc., helps automate sales and use tax compliance for small to medium-sized businesses. By enabling calculations and returns in a single, cloud-based solution, offering flexible service levels, and featuring attractive pay-as-you-go pricing with no upfront fees, Vertex SMB meets the sales and use tax automation needs of growing businesses.

About Vertex Inc.

Founded in 1978, Vertex Inc. is the leading provider of corporate tax software and services to automate, integrate, streamline, or outsource tax processes for companies of all sizes, from small to medium-sized businesses to global multinationals. Vertex provides solutions for all tax types with industry-specific solutions for retail, communications, hospitality, and leasing industries. Visit www.vertexinc.com.



1041 Old Cassatt Road
Berwyn, Pennsylvania 19312
Toll-free: 855.221.5885
Email: info@vertexSMB.com
www.vertexSMB.com

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Install the connector

Use the following steps to install the Magento 2.0 Connector.

1. Ensure that you have the proper permissions to create, read, and modify files in your Magento directory.
2. Upload the file `vertexsmb.zip` into the root directory of your Magento site.
3. Unzip the file `vertexsmb.zip`.
4. Confirm that `{MAGE_ROOT}/app/code` contains a new folder called `VertexSMB`.
5. Navigate to `{MAGE_ROOT}/app/etc/` and open the file `config.php`.
6. Add the following line to the array:

```
'VertexSMB_Tax' => 1,
```

For example:

```
'Magento_WeeeStaging' => 1,  
'Magento_CatalogWidget' => 1,  
'Magento_WidgetSampleData' => 1,  
'Magento_BundleStaging' => 1,  
'Magento_MultipleWishlistSampleDat  
'Magento_Worldpay' => 1,  
'VertexSMB_Tax' => 1,
```

7. Save the file `config.php`.
8. Refresh all caches (found in `System > Cache management`).

Configure Magento 2.0

You must configure the Magento 2.0 connection for each web site, web store, and store view. You can select the store view on the top left of the Configuration section.

The configuration requires the following Vertex SMB settings, which you can get from TaxCentral:

- Vertex SMB Calculation API URL
- Vertex SMB Address Validation API URL
- Vertex SMB trusted ID
- Company code
- Location code

NOTE: Multiple ship-to addresses are not supported.

Use the following steps to configure the connection in Magento 2.0.

1. Log out of the Magento 2.0 Admin Panel and log back in.
2. From the Magento 2.0 Admin Panel, navigate to **Stores > Configuration > Sales > Tax**. The Vertex SMB Settings section is displayed.
3. Enter the following information in the Vertex SMB Settings section. This section provides the general settings that power Vertex SMB.

Enable Vertex SMB Tax Calculation

Select **Yes**.

Vertex SMB Calculation API URL

Enter the URL for the API that calculates sales tax. This URL can be found in TaxCentral by navigating to **Settings > View All Connectors** and looking in the **Magento** row and the **ERP Connector URL** column.

NOTE: Add `?wsdl` to the end of the URL.

Vertex SMB Address Validation API URL

Enter the URL for the API that validates addresses. This URL can be found in TaxCentral by navigating to **Settings > View All Connectors** and looking in the **Magento** row and the **Address Lookup URL** column.

NOTE: Add `?wsdl` to the end of the URL.

Vertex SMB Trusted Id

Enter the trusted ID that authenticates the connection between Magento 2.0 and Vertex SMB. This ID can be found in TaxCentral by navigating to **Settings > View All Connectors** and looking for the **Trusted ID** at the top of the page.

Vertex SMB Calculation API URL

Select one of the following options to determine when tax should be invoiced to Vertex SMB:

When Invoice Created – Calculate tax results for the sales order and update tax returns in TaxCentral.

When Order Status Is - Only calculate tax results for the sales order.

Contact support@vertexsmb.com if you have questions.

Allow tax quote request at shopping cart page

Select **Yes** or **No** to determine whether taxes are calculated in the shopping cart when using the estimate function.

Show Manual Invoice Button

Select **Yes** or **No** to display or hide the **Show Manual Invoice** button within the Admin Panel. Enabling this option can affect the usual invoice workflow and should be used only for debugging and development purposes.

Show Tax Jurisdiction(s) Popup

Select **Yes** or **No** to determine whether the Enable/Disable Tax Jurisdiction(s) popup window is displayed on checkout and admin create order pages.

4. Enter the following information in the Vertex SMB Company Information section. This section provides company information for the merchant.

Company Code

Enter the company code that matches the company code in TaxCentral. This code can be found in TaxCentral by selecting **Configure** in the menu and clicking **Edit** in the Registrations section. Contact support@vertexsmb.com if you have questions.

Location Code

Enter the company code that matches the company code in TaxCentral. This code can be found in TaxCentral by selecting **Configure** in the menu and clicking **Edit** in the Registrations section. Contact support@vertexsmb.com if you have questions.

Company Street Address
Company Street Address 2
Company City
Company Country
Company State
Company Postal Code

Enter the company address. This is used as the ship-from location in tax calculations.

5. Enter the following information in the Vertex SMB Tax Classes section:

Tax Class for Shipping

(Optional) Select the class for all shipping codes. If you set up a shipping class code in TaxCentral, then create that code in Magento in Sales, Tax, and Product Tax Classes and select it as the Tax Class for Shipping.

Default Customer Code

(Optional) Enter the default class for all customers. If you set up this default customer code in Magento, then you need to create that code in TaxCentral by selecting **Configure** in the menu and clicking **+ Add Exception** in the Customer Exceptions section.

6. In the Calculation Settings section, select **Vertex SMB** in the **Tax Calculation Method Based On** drop-down list.
7. Click **Save Config**. The **Vertex SMB API Status** should change to a green bar with the word VALID.