TaxCloud Quick Start Guide for FlickRocket

TaxCloud® is a free, easy-to-use sales tax management service for retailers. FlickRocket is an e-commerce platform for both digital downloads and physical products that is used by thousands of retailers worldwide. FlickRocket has partnered with TaxCloud to provide a free sales tax compliance option for all FlickRocket retailers. This document provides details for configuration and use of TaxCloud with FlickRocket, so you can get started quickly.

1 How FlickRocket works with TaxCloud

After a customer has entered a shipping address during checkout, FlickRocket sends TaxCloud a request to calculate the sales tax due. TaxCloud returns that information to FlickRocket for display on the FlickRocket checkout page. Once the order is completed, FlickRocket sends another request to TaxCloud to capture the transaction. All captured transactions are included in the sales tax reports that TaxCloud generates at the end of each month.

2 Preparation

Here's what you'll need:

▸ A **TaxCloud account**. Register at https://taxcloud.com/ . After confirming your TaxCloud account registration (via email) you will need to login to your TaxCloud account and enter your office address(es), FlickRocket shop URL, and the states where you want to collect sales tax. (For step-by-step details, see the TaxCloud User Guide.)

▸ TaxCloud **API ID and API Key**. These can be found in your TaxCloud account on the "Websites" page. Your FlickRocket shop should have been added when you registered for your account. If it isn't already listed, just click "Add website" and enter your FlickRocket shop name and URL. The API ID and Key for that website will be generated and assigned automatically. You will need to copy these credentials over to your FlickRocket shop during the configuration step. **Please do not share these credentials with anyone else or use them for multiple URLs**.

▸ Set your **Default TIC** for your FlickRocket shop within TaxCloud. To ensure your customers are charged the correct rates and benefit from any available exemptions, you will want to select a Default Tax Information Code (or TIC). For the complete list of TICs, login to TaxCloud and go to the "Taxability Codes" section.

Note: Even though you have set a store-wide default TIC, you can still set item-level TICs from the Tax Calculation setting on each Project page.
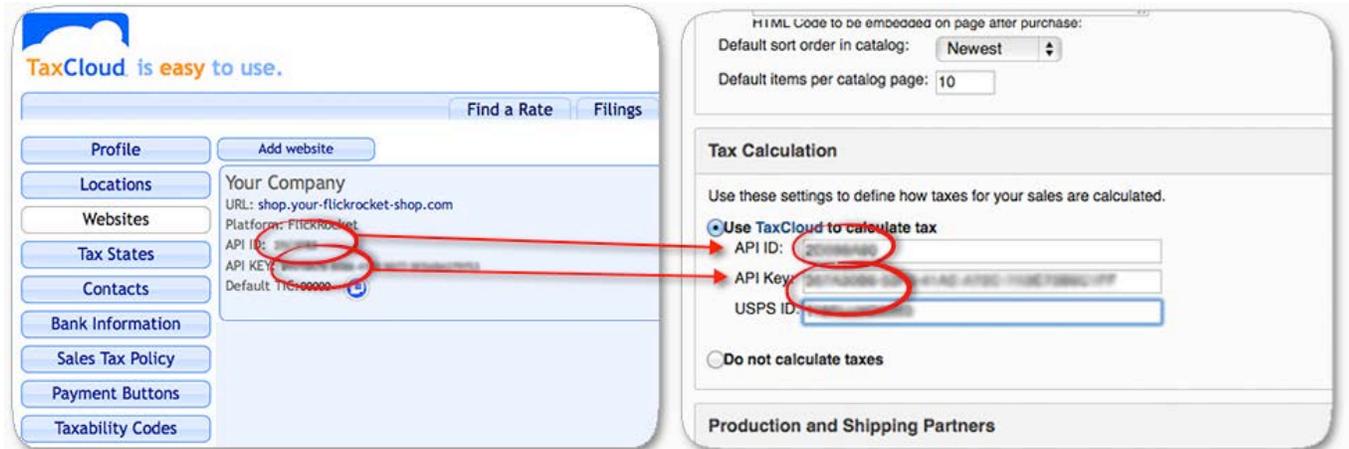
▸ **USPS ID:** In order to verify the addresses of your customers, you will need a United States Postal Service WebTools ID (we call it a USPS ID for short). To get your USPS ID, go to https://www.usps.com/webtools/ and click "Register Now". Your USPS ID will be emailed to you.

3 Configuration

Once you have registered with TaxCloud, you will need to log into FlickRocket and configure your FlickRocket settings as follows:

▸ **Configure General TaxCloud Settings**

Select **Shop**>**General**>**General Settings** and then choose **Use TaxCloud to calculate tax**. Then enter the T**axCloud API ID**, the **TaxCloud API Key,** the **USPS ID** and click **Save**.

▸ **Set Item-Level TIC Codes**

To set the item-level TIC code for each project, select **Projects**>**List/edit projects** and click the link for the desired project under the **Edit Project** list. Once on the **Edit Project** page, configure the TIC code under the **Tax Calculation** section.

▸ **Set Shipping TIC Code**

To set the Shipping TIC code, select **Shop**>**Prices**>**Manage price models for shipping** and choose the TIC code in the **Tax Calculation** section. Normally the correct Taxability Information Code (or TIC) for shipping charges is "Shipping (11010)", and this will be the default for your shop. There is another option available, "Shipping & Handling (11000)"–You will set this to be your Shipping TIC code if you charge your customers more for shipping than your actual shipping costs. **IMPORTANT: You should consult with your accountant or tax advisor(s) before modifying this setting.**

4 Testing

Once you have completed these steps, try some test transactions to make sure everything is working correctly. Make sure to complete at least one test order. The test order must be purchased; it's not enough to just add an item to your cart. To review your test order(s), log in to TaxCloud and click on the "Transactions" tab. Click on any transaction to see details about that order.

5 Going Live

TaxCloud is in test mode until you set your account to live status. When you're ready to go live, log in to TaxCloud, go to the "Websites" page, and click the "Go Live!" button. **That's it!** If you do not see a "Go Live!" button, you'll see a message telling you what you need to do in order to go live.