Wolters Kluwer

# CCH® Sales Tax Office

## Installation Guide

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# Contents

Chapter 1

# CHAPTER 1 — INSTALLATION OVERVIEW

This guide provides information about the installation of Sales Tax Office (STO) that will help make the installation process run smoothly for you.

## General Installation Guidelines

For both workstation and server installations, you should close all applications, disable active virus scanning (you can re-enable it after completing the installation process), and determine the drive where you will be installing Sales Tax Office.

For both installing and uninstalling, Windows users who have the User Access Control feature turned on will be prompted by the operating system to grant the program permission to proceed.

## System Requirements

Sales Tax Office has the following system requirements:

### Database

Microsoft SQL 2012, Microsoft SQL 2014 (or newer)

### Calculation Server

Windows Server 2008 R2, Windows Server 2012, Windows Server 2012 R2 (or newer)

### Workstation

Supported browsers:

- Internet Explorer 11 and newer
- Google Chrome 35.0 and newer

Appearance is optimized for screen resolution of 1280x1024.

**Notes:**

- If the computer does not meet operating system or IIS version requirements, the installation automatically terminates and a message displays the reason.
- In your IIS configuration settings, enable all HTTP verbs (GET, POST, PUT, DELETE and OPTIONS at minimum).
- If the computer on which the application will be installed does not have Microsoft .NET Framework 4.5.2 installed, a dialog displays regarding the need to install it. You must install the proper version of .NET to proceed.
- Sales Tax Office will certify and support Windows Server 2008 R2, Server 2012, and Server 2012 R2.

# Setting up Required Windows Roles and Features for the Server

## Windows Server 2008 R2

1. Select **Start** > **Control Panel** > **Programs and Features**.
2. Select **Turn Windows features on or off**.
3. In the Roles Summary section, click **Add Roles**.
4. On the Add Roles Wizard dialog, click **Next**.
5. Select **Web Server (IIS)**.
6. Click **Next**.
7. On the Web Server (IIS) dialog, click **Next**.
8. On the *Select role services* dialog, select the following:
   - Management Tools: IIS Management Console
   - Management Tools: IIS Management Scripts and Tools
9. On the *Select role services* dialog, select the following:
   - Application Development: ASP.NET
   - Application Development: .NET Extensibility
   - Application Development: ISAPI Extensions
   - Application Development: ISAPI Filters
10. Click **Next**.
11. On the Confirm Installation Selections dialog, click **Install**.
12. Click **Close** on the Installation Results dialog.
13. In the Features Summary section, click **Add Features**.
14. On the Add Features dialog, select **.NET Framework 3.5.1 Features: WCF Activation: HTTP Activation**.
15. Click **Next**.
16. On the Confirm Installation Selections dialog, click **Install**.
17. Click **Close** on the Installation Results dialog.

   **Important**: Install .NET 4.5.2 or greater after all other Roles and Features are added.

## Server 2012

1. Select **Start** > **Control Panel** > **Programs and Features**.
2. Select **Turn Windows features on or off**.
3. In the *Configure this local server* section, click **Add roles and features**.
4. On the Add Roles and Features Wizard dialog, click **Next**.
5. On the *Select destination server* dialog, make sure the proper Server is selected and click **Next**.
6. Select the following in the Roles grid:
   - Application Server: .NET Framework 4.5
   - Windows Process Activation Service Support: HTTP Activation
   - Web Server (IIS)

     **Note**: Add all Features of Web Server (IIS).

   - Application Server: Web Server (IIS) Support

     **Note**: Add all Features of Web Server (IIS).

7. On the *Select server roles* dialog, click **Next**.
8. Verify the following Features are selected in the grid:
   - .NET Framework 3.5
   - .NET Framework 4.5
   - ASP.NET 4.5
9. Select **WCF Services: HTTP Activation**.
10. On the *Select features* dialog, click **Next**.
11. On the Web Server Role (IIS) dialog, click **Next**.
12. On the *Select role services* dialog, select the following:
    - Management Tools: IIS Management Console
    - Management Tools: IIS Management Scripts and Tools
13. On the *Select role services* dialog, select the following:
    - Application Development: ASP.NET 4.5
    - Application Development: .NET Extensibility 4.5
    - Application Development: ISAPI Extensions
    - Application Development: ISAPI Filters
14. Click **Next**.
15. On the *Confirm installation selections* dialog, click **Install**.

    **Important**: Install .NET 4.5.2 or greater after all other Roles and Features are added.

## Server 2012 R2

1. Select **Start** > **Control Panel** > **Programs and Features**.
2. Select **Turn Windows features on or off**.
3. On the Add Roles and Features Wizard, click **Next**.

4. On the *Select destination server* dialog, make sure the proper Server is selected and click **Next**.
5. Select the following Roles in the grid:
    - Application Server: .NET Framework 4.5
    - Windows Process Activation Service Support: HTTP Activation
    - Web Server (IIS)

      **Note**: Add all Features of Web Server (IIS).
    - Application Server: Web Server (IIS) Support

      **Note**: Add all Features of Web Server (IIS).
6. On the *Select server roles* dialog, click **Next**.
7. Verify the following Features are selected in the grid:
    - .NET Framework 3.5
    - .NET Framework 4.5
    - ASP.NET 4.5
8. Select **WCF Services: HTTP Activation** from the Features grid.
9. On the *Select features* dialog, click **Next**.
10. On the Web Server Role (IIS) dialog, click **Next**.
11. On the *Select role services* dialog, select the following:
    - Management Tools: IIS Management Console
    - Management Tools: IIS Management Scripts and Tools
12. On the *Select role services* dialog, select the following:
    - Application Development: ASP.NET 4.5
    - Application Development: .NET Extensibility 4.5
    - Application Development: ISAPI Extensions
    - Application Development: ISAPI Filters
13. On the *Select role services* dialog, click **Next**.
14. On the *Confirm installation selections* dialog, click **Install**.

    **Important**: Install .NET 4.5.2 or greater after all other Roles and Features are added.

## Configuring Your Database

To configure the database, do the following:

**Note**: The login, password, and database names cited below are examples. You can use any names you choose.

1. Create a storage folder on the server machine.
2. Copy the **database.zip** file into the folder (the database.zip file is located on the root of the Sales Tax Office CD).
3. Unzip the database file.

4. Launch the SQL Server Management Studio (SQL 2012 Server or SQL Server 2014, as appropriate) and create a new login user. An example would be to make the Login **Taxcalc** and the password **Taxcalc**. Grant only bulk admin, disk admin, and public roles to the new user.
5. Attach the blank STO database (unzipped in step 3).

   **Notes**:

   - When attaching the blank database to the SQL server, ensure the database owner is **Taxcalc** (if you are using the example provided, the entry would be Taxcalc for both fields).
   - Edit the Taxcalc user and change the Default Database name to **Taxcalc**.

## Order of Installation

We recommend you install in the following order:

1. Server
2. API Services
3. Web UI

**Notes**:

- After installing the programs, you should load the initial data into your STO database.
- To load data to the Sales Tax Office Database, the .TXT files must be on the application server.
- Sales Tax Office will not function if it cannot make a connection to the server.
- To perform periodic updates using the Maintain Database Update function, the .TXT files must be on the application server.

  For more information, see the *Database Updates* section in the Sales Tax Office help files.

**Important**: A security warning may appear when installing or browsing to a network location (depending on your operating system's security settings). CCH is a trusted publisher. Click **Run** to continue.

## Pre-Installation Steps

Regardless of the programs being installed, the installation process begins with the following steps:

1. Insert the Sales Tax Office installation CD.
2. Click the **Start** button at the lower-left corner of your desktop.
3. Select **Run**.
4. Enter the path for the drive containing the installation CD followed by **Setup.exe**, or click **Browse** and select the **Setup.exe** file on the installation CD.
5. Click **OK**. The program main installation dialog displays.
6. Click **Install Guide** to view the Sales Tax Office Installation guide.

## Uninstalling Sales Tax Office Components

Sales Tax Office components are uninstalled using Control Panel's Add/Remove Programs. You can selectively remove Sales Tax Office Calculation, Sales Tax Office Server, or Sales Tax Office Administration.

**Note**: Components can also be uninstalled using Program Maintenance if the installed version is the same as the version on the Sales Tax Office Installation CD.

Chapter 2

# Chapter 2 — Pre-Installation Steps for Existing Users

If you are an existing Sales Tax Office customer (version 3.7 or above), before upgrading to Sales Tax Office version 4.0 you must migrate the user profile files for all existing customers.

In previous versions of Sales Tax Office, multiple user accounts could have the same email address associated with them, so that users could log in to multiple entities. However, Sales Tax Office 4.0 uses each user's email address as their login for all Companies and Legal Filing Entities. Therefore, there may be duplicate logins during the migration. Sales Tax Office will consolidate these duplicate logins into a single login.

During the migration process, each time there are multiple logins with the same email address, Sales Tax Office will create one active login. This login will maintain the rights and roles the duplicate logins previously possessed for the individual Companies and Legal Filing Entities.

Also, to complete the migration process, you will need to provide an email address for each Sales Tax Office 4.0 user.

If you are an existing Sales Tax Office customer (version 3.7 or above), you must perform two steps before you begin the installation process.

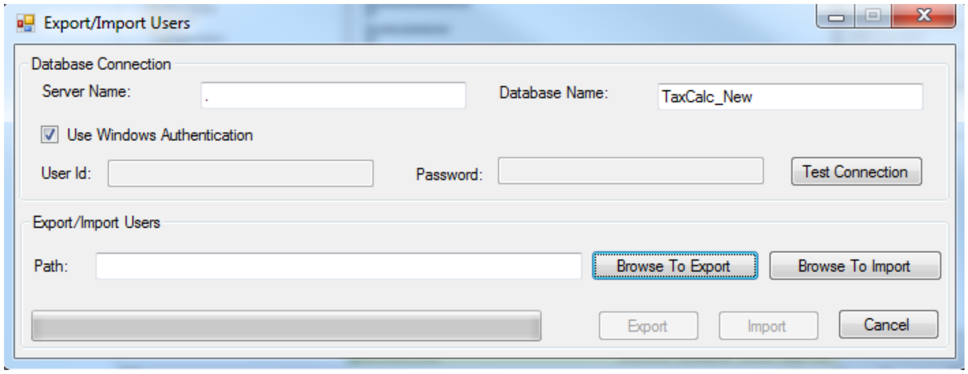
**Note**: These steps need to be performed only once, upon the initial upgrade from Sales Tax Office version 3.x to 4.0.

1. Export your existing user data in order to add email information for each user, and then import the updated data.
2. Update your old Sales Tax Office database by running the Sales Tax Office Database Update.

## Updating Existing User Data

To export and import your existing user data, do the following:

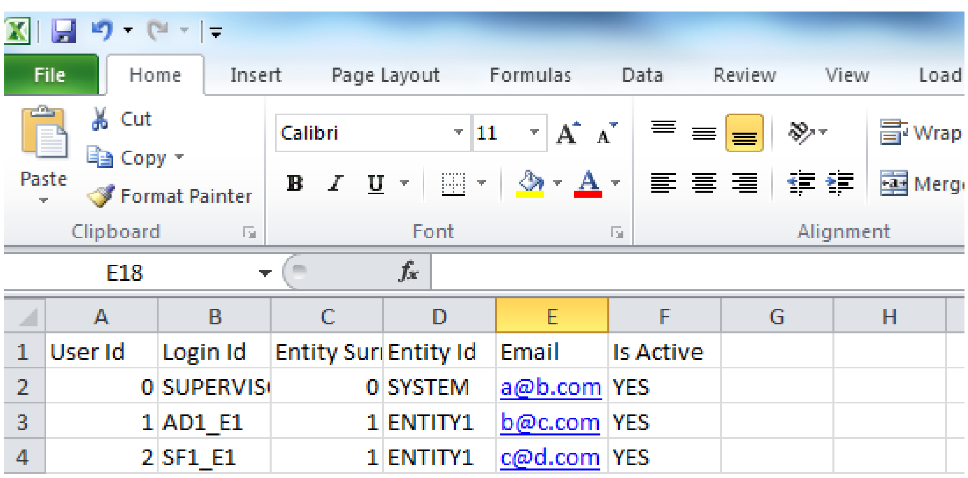
1. On the Sales Tax Office installation CD, browse to the Migration folder, and then double-click the **ExportUsers.exe** file. The Export/Import Users dialog displays.




2. Enter the name of your existing Sales Tax Office server.
3. Enter the name of your existing Sales Tax Office database.
4. Do one of the following:
   - Select **Use Windows Authentication** to use your Windows login information.
   - Clear the Use Windows Authentication check box to enter your SQL user ID and password.
5. Click **Test Connection** to verify your login information is correct.
6. Click **Browse to Export** and select the location you want the CSV export file to be exported to.
7. Click **Export**. A message displays stating that the data is ready at the provided location.
8. Once the data has been exported, open the CSV file and enter your users' email addresses.

   **Important**: Do not change any data in the CSV file other than adding email addresses.

   **Note**: For the super admin user, you can use the existing Administrator user's email address, or you can enter a new email address.



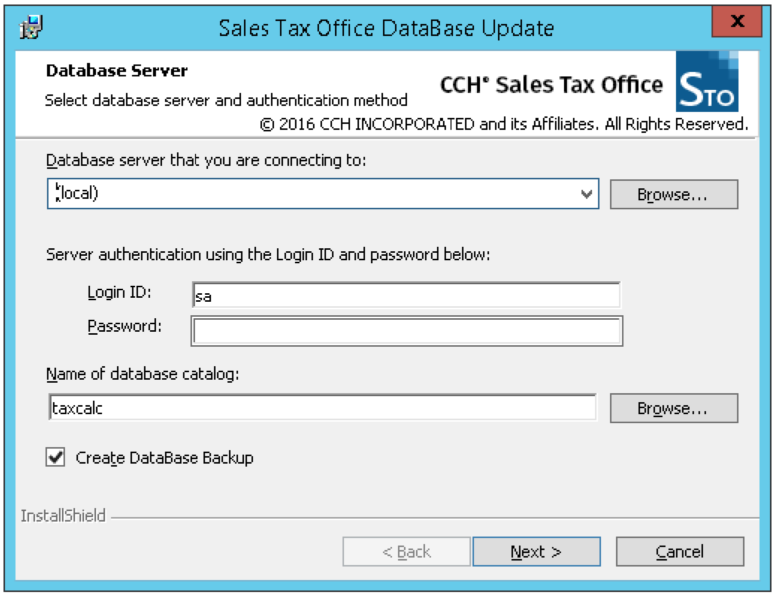
| | A | B | C | D | E | F | G | H |
|---|---|---|---|---|---|---|---|---|
| 1 | User Id | Login Id | Entity Suri | Entity Id | Email | Is Active | | |
| 2 | 0 | SUPERVIS | 0 | SYSTEM | a@b.com | YES | | |
| 3 | 1 | AD1_E1 | 1 | ENTITY1 | b@c.com | YES | | |
| 4 | 2 | SF1_E1 | 1 | ENTITY1 | c@d.com | YES | | |

9. After you have entered email addresses for all existing users, save and close the CSV file.
10. On the Export/Import Users utility, click **Browse to Import** and select the updated CSV file.
11. Click **Import**.
12. Close the Export/Import Users utility after the import is complete.

# Updating the Database to Sales Tax Office 4.0

To update your existing database to the Sales Tax Office 4.0 database, do the following:

1. From the main installation dialog, click **Sales Tax Office Database Update**. The Preparing to Install... screen displays with a progress bar. Then the Sales Tax Office Database Update dialog displays.

2. Click **Browse...** to select the database server you are connecting to.
3. Enter the login and password for the database server.
4. Click **Browse...** to select the database catalog.
5. Select **Create Database Backup** if you want to create a backup.

   **Note**: The backup folder must be accessible to the Sales Tax Office server.

6. Click **Next**. The Ready to Update the STO Database dialog displays.
7. Click **Update**. A confirmation screen displays when the update is complete.

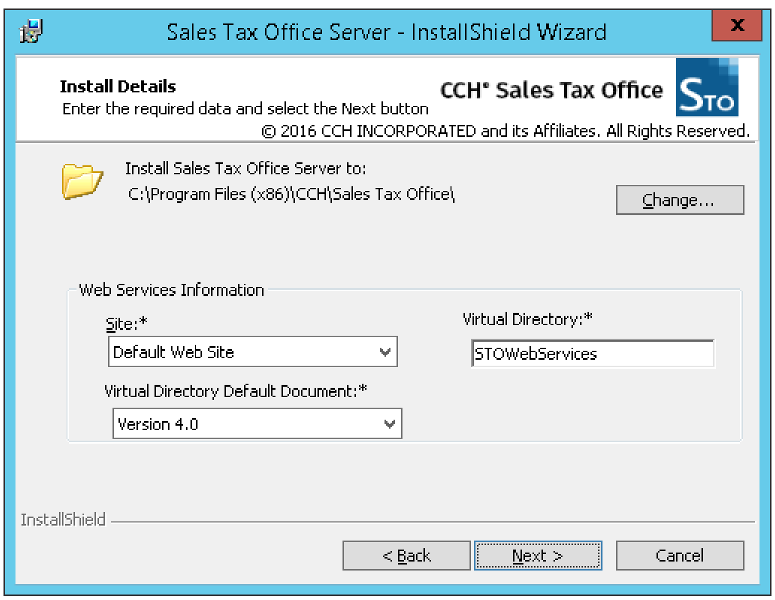
Chapter 3

# Chapter 3 — Installing Sales Tax Office

## Installing the Sales Tax Office Server

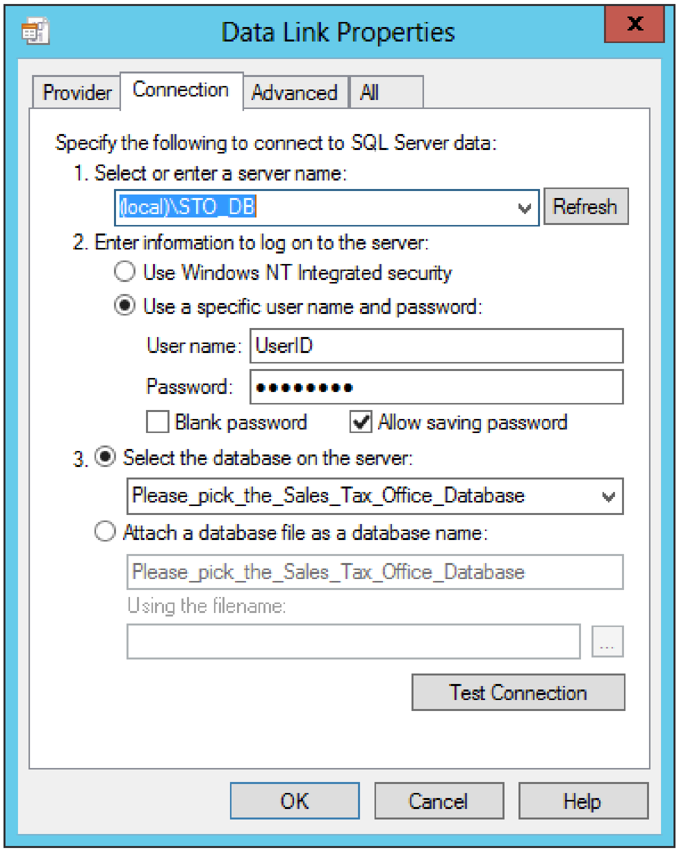
To perform a server installation, do the following:

1. From the main installation dialog, click **Sales Tax Office Server**. A message displays notifying you that the installation will fail if the Sales Tax Office database is not available.
2. Click **OK**. The Sales Tax Office Server installation wizard displays.
3. Click **Next**. The Install Details dialog displays.




4. If necessary, click **Change** to change the installation path. The Change Current Destination Folder dialog displays. Select your installation destination folder.
5. Leave the default of **Default Web Site** in the Site list.
6. Use the default value of **STOWebServices** in the Virtual Directory field.
7. For the Virtual Directory Default Document list, use version 4.0 except in certain circumstances. Check with your representative from CCH Sales Tax Consulting for more information.
8. Click **Next**. The *Ready to install the program* dialog displays.
9. Click **Install**. An installation progress bar displays.

10. Do one of the following:
    - If you are an existing Sales Tax Office (version 3.7 or newer) customer, click **Finish**.
    - If you are a new Sales Tax Office customer, continue with step 11.
11. Upon completion of the installation, the Data Link Properties dialog displays. On the *Connection* tab, select the name of the server that holds your database.




12. Do one of the following:
    - Specify a specific user name and password by doing the following:
        i. Select **Use a specific user name and password**.
        ii. On the Connection tab, select the name of the server that holds your database.
        iii. Enter the user name and the password for the attached STO database.
        iv. Select the attached STO database name from the *Select the database on the server* list.
        v. Click **Test Connection** to verify that the information is correct.
    - If you prefer not to enter your user name and password, do the following:
        i. Create a domain service account in Internet Information Services and another in the SQL login.
        ii. Assign the permissions to the Sales Tax Office database for that login.

iii. Select **Use Windows NT Integrated security** on the Connections tab of the Data Link Properties, or modify the connection string for integrated security in the web.config file.

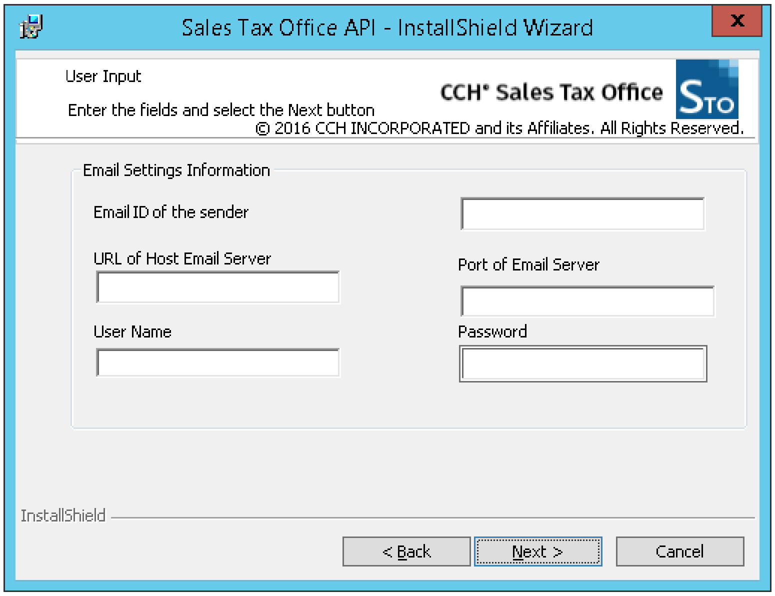
13. Click **OK** on the Data Link Properties dialog.
14. Click **Finish**.

## Installing Sales Tax Office API Services

To install Sales Tax Office API Services, do the following:

1. From the main installation dialog, click **Sales Tax Office API Services**. The Preparing to Install... dialog displays. If your computer has the necessary prerequisite components installed, a message displays notifying you that the installation will fail if the Sales Tax Office database is not available.
2. Click **OK**. The Welcome to the InstallShield Wizard for Sales Tax Office API screen displays.
3. Click **Next**. The Install Details dialog displays.

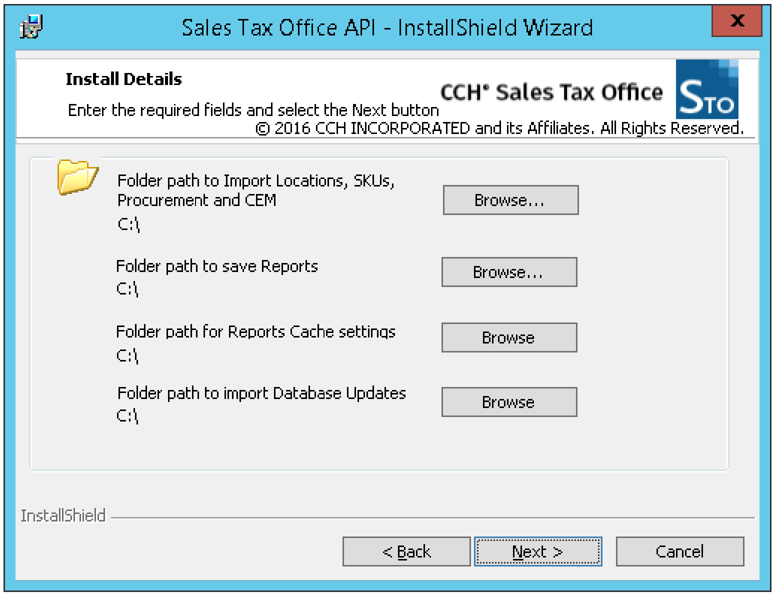

4. If necessary, click **Change** to browse to a different installation destination.
5. Use the default value of **Default Web Site** in the Site list.
6. Use the default value of **STOAPIWebServices** in the Virtual Directory field.
7. Enter the STO Administrator User ID and Password.
8. Click **Next**. The User Input dialog displays.




9. Do one of the following:
   - Enter your email server information. To find your email server information, select **File > Account Settings** in Outlook, and then double-click your user name on the E-mail tab.
     - **Email ID of Sender**. Enter your email address.
     - **URL of Host Email Server**. Enter the URL for your email server. If you do not know the server URL, ask your email administrator.
     - **Port of Email Server**. Enter the email server's port.
     - **User Name**. Enter your email account's user name.
     - **Password**. Enter your email password.
     - **Error log email settings**:
       - **From**. When an error log is sent, the email will appear as being sent from this address.
       - **To**. When an error log is sent, it will be sent to this address.
   - If you do not enter your email server information, you can do the following at a later time:
     i. Open Internet Information Services.
     ii. Under Sites, right-click the node for STO API Services and select **Explorer**.
     iii. Locate the file web.config and open it as an Administrator.
     iv. Locate the setting for SMTP, and then enter the details for your username and password.

```
<system.net>
  <mailSettings>
    <smtp deliveryMethod="Network" from="Test@Test.com">
      <network host="Test" enableSsl="true" userName="Test@Test.com" password="Test" port="587"/>
    </smtp>
  </mailSettings>
</system.net>
```

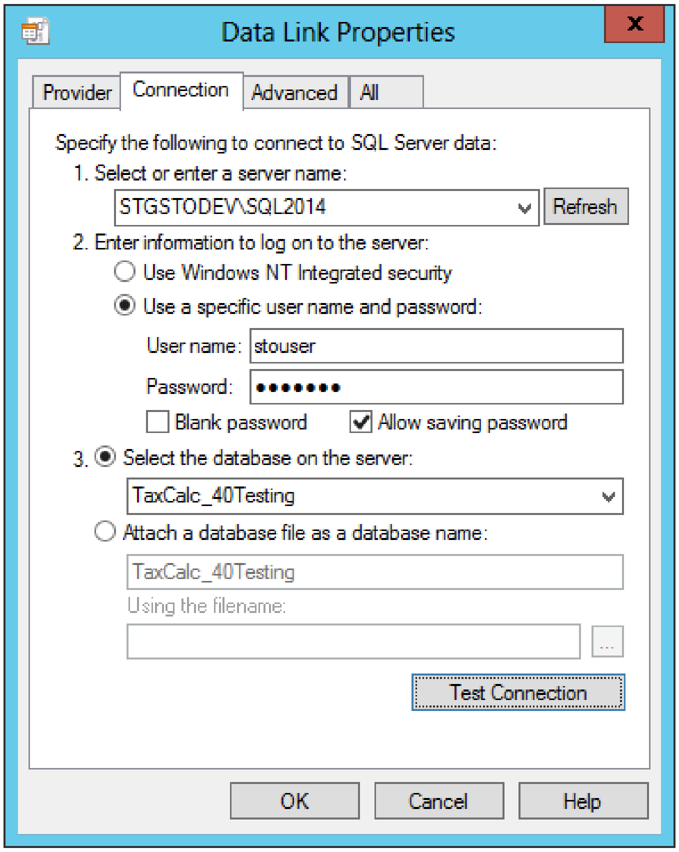
10. Click **Next**. A second Install Details dialog displays.




11. Select the folders where you want the following files to reside:
    - Locations, SKUs, Procurement, and Customer and Exemption Management imports
    - Saved reports
    - Reports cache settings
    - Imported database updates
12. Click **Next**. The *Ready to install the program* dialog displays.
13. Click **Install**. An installation progress bar displays. Upon completion of the installation, the InstallShield Wizard Completed dialog displays.

    **Note**: The InstallShield Wizard Completed dialog displays even if the installation is not successful; the text displayed in the dialog will vary depending upon the installation outcome.

Upon completion of the installation, the Data Link Properties dialog displays.



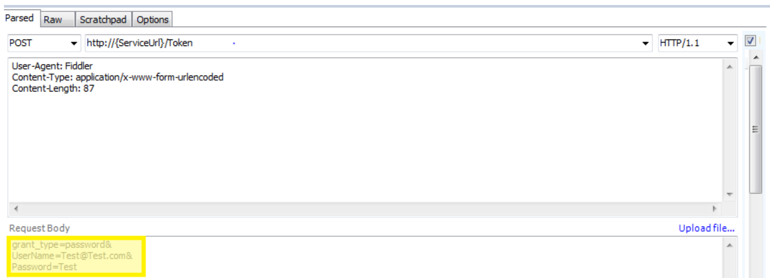

14. Do one of the following:
    - Specify a specific user name and password by doing the following:
        i. Select **Use a specific user name and password**.
        ii. On the Connection tab, select the name of the server that holds your database.
        iii. Enter the user name and the password for the attached STO database.
        iv. Select the attached STO database name from the *Select the database on the server* list.
        v. Click **Test Connection** to verify that the information is correct.
    - If you prefer not to enter your user name and password, do the following:
        i. Create a domain service account in Internet Information Services and another in the SQL login.
        ii. Assign the permissions to the Sales Tax Office database for that login.
        iii. Select **Use Windows NT Integrated security** on the Connections tab of the Data Link Properties, or modify the connection string for integrated security in the web.config file.
15. Click **OK** on the Data Link Properties dialog.
16. Click **Finish**. A dialog displays asking you to enter the server and login information for the Elmah Logs database.
17. Click **OK**. Another Data Link Properties dialog displays for you to supply information for the Elmah Logs database.

18. Enter the server name, login information, and database name for the Elmah database.
19. Click **OK**.

## Testing the Web API

To test the connection to the Web API, do the following:

1. Browse to the Sales Tax Office API Service and copy the service URL from the address bar.
2. Make a post request to {ServiceURL}/Token endpoint using any HTTP Client (for example, Fiddler) with Username and Password, set the grant_type to **password**, and generate a token.




3. Click the link to open the API documentation.

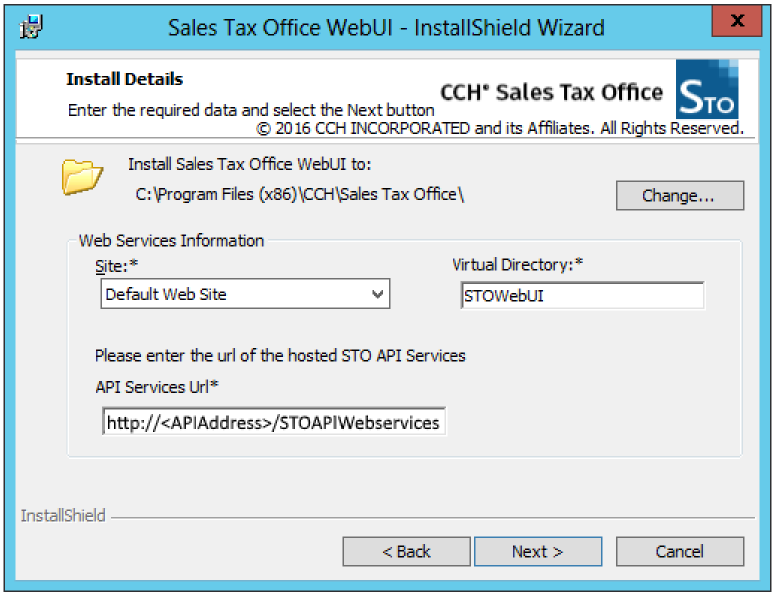

4. Click the API that needs to be tested and verify the generated token is passed in the Authorization header.

## Installing the Sales Tax Office Web User Interface

To install the Sales Tax Office Web User Interface, do the following:

**Note**: ASP.NET Session state services should be running before you begin installing the Web User Interface.

1. From the main installation dialog, click **Sales Tax Office Web UI**. The Preparing to Install... dialog displays.
2. The Welcome to the InstallShield Wizard for Sales Tax Office Web UI screen displays.
3. Click **Next**. The Install Details dialog displays.




4. If necessary, click **Change** to browse to a different installation destination.
5. Use the default value of **Default Web Site** in the Site list.
6. Use the default value of **STOWebServices** in the Virtual directory field.
7. Use the following format to enter the URL for your hosted STO API Services in the API Services URL field, replacing <APIAddress> with the IP address for your API Services.

   ```
   http://<APIAddress>/STOAPIWebservices
   ```

8. Click **Next**. The *Ready to install the program* dialog displays.
9. Click **Install**. An installation progress bar displays.
10. Click **Install**. An installation progress bar displays. Upon completion of the installation, the InstallShield Wizard Completed dialog displays.

    Note: The InstallShield Wizard Completed dialog displays even if the installation is not successful; the text in the dialog varies depending upon the installation outcome.

11. Click **Finish**.

## Maintaining Configuration Settings

If you are operating Sales Tax Office with multiple environments, you can manage the configuration settings for each instance of Sales Tax Office.

Caution: Changing these settings incorrectly may prevent Sales Tax Office from performing calculations or accessing its database.

**Notes**:

- Maintaining the configuration settings is available for the super admin user only.
- Sales Tax Office does not support use of a single instance of Sales Tax Office in multiple environments from within a session of Sales Tax Office.
- Configuration settings are refreshed every 60 seconds when a change is made. You can configure this amount using the calc service web configuration file.

To set up or change your configuration settings, do the following:

1. Select the **Administration** tab, and then click **Configuration Settings**. The Maintain Configuration Settings page displays.
2. Enter a name for the environment in the Environment Name field. The Environment Name will appear in the upper right-hand corner of Sales Tax Office.
3. Enter the service URL in the Service URL field. This URL is used by Sales Tax Office to communicate with web services.
4. Click **Test Service Connection** to validate the URL for web service.
5. Enter your Subscription Update Manager Subscription ID and Password.
6. Click **Test SUM Connection** to validate your Subscription Update Manager ID and password.
7. Select **On** and enter the Address Verification URL to enable address validation. Address Validation Web Service allows Sales Tax Office to validate and correct the address for accuracy using third-party address validation software. This is available only if you subscribe to Sales Tax Address Validation Web Services.
8. If address verification is enabled, enter the Verification Timeout amount in milliseconds. This determines how long the system will wait if there is no response from Address validation. For example, enter **3000** if you want the system to wait three seconds.
9. Select an Address Validation Failure option to determine how Sales Tax Office will react when address validation is present and the address passed with the transaction fails validation:
   - **Continue with name-based processing**. When selected, Sales Tax Office will generate the best match for the address that failed validation.
   - **Reject transaction**. When selected, Sales Tax Office will reject the transaction with an address that failed validation.
10. Select a Transaction Date for Reuse option:
    - **True**. If an order has a transaction date, the transaction date will be used. If an order's transaction date is null or empty, then today's date will be used.
    - **False**. The order's transaction date will be used, even if it is null or empty.
11. Select a Freight Follow Rule option:
    - **Enable**. When enabled, the freight follow rule in Sales Tax Office assigns taxability for freight line items based on the taxability of the TPP line items on the same invoice. If the line items are non-taxable, then freight is treated as non-taxable; if any line item on the invoice is taxable, then STO will treat the freight amount as taxable.
    - **Disable**. Disables freight follow processing. Freight will be taxed based on the specific taxability rule for that freight.

12. If freight follow is enabled, select the Operation Mode for freight follow processing:
    - **Taxability**. This is the existing method based on the taxability decision. The determination for triggering Freight Follow is based on the taxability of non-freight items in the transaction. If any non-freight item is taxable, then Freight Follow logic is triggered.
    - **Tax Collected**. This method is based on the amount of tax collected. The determination for triggering freight follow is based on the tax collected of non-freight items in the transaction. If any non-freight item has tax collected, then freight follow logic is triggered.
13. Enter the DB Command Timeout amount in seconds. This is the wait time before terminating the attempt to execute a command and generating an error.
14. Enter a Report Query Timeout amount in seconds. This is the number of seconds report queries can run before timing out.
15. Enter an amount for the Bulk Copy Size. This is the number of records that can be processed at one time.
16. Complete the following in the Report Repository Delete Settings section:
    - **Delete Report After (in days)**. Enter the number of days before a report should be marked for deletion.
    - **Delete Frequency**. Select whether reports that are marked for deletion should be deleted every day, every week, or every month.
    - **Day/Date**. If Delete Frequency is set to Weekly, select the day of the week reports will be deleted. If Delete Frequency is set to Monthly, select the day of the month reports will be deleted.

      **Note**: Reports will not be deleted during months that do not include the date you select. For example, if you select **Monthly** and then select **30**, reports will not be deleted during February.

    - **Time (HH:mm)**. Select the time of day reports should be deleted.
17. Select a Calculation Rounding option. This setting determines whether the calculation processing should use Order level or Line Item level rounding algorithm while calculating transaction taxes.
    - **Invoice**. Invoice adds up all of the line items and then rounds the total.
    - **Line Item**. Line item rounds the tax at the line item tax authority level.
18. Select a Line Item Rounding option:
    - **Three decimal places**. When selected, all dollar figures at the line item, including tax liability amounts, are rounded to three decimal places.
    - **Two decimal places**. When selected, all dollar figures at the line item level, including tax liability amounts, are rounded to two decimal places.
19. Click **Save** to save your changes and close the Maintain Configuration Settings dialog.

Chapter 4

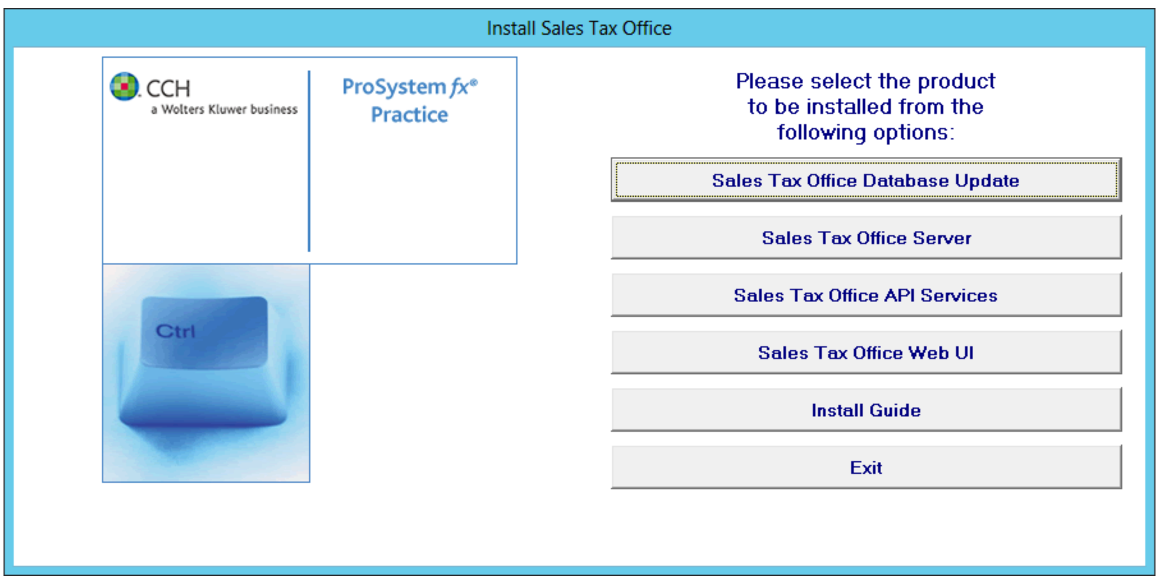
# Chapter 4 — Updating to a New Version of Sales Tax Office

The process of updating Sales Tax Office is similar to the installation process.

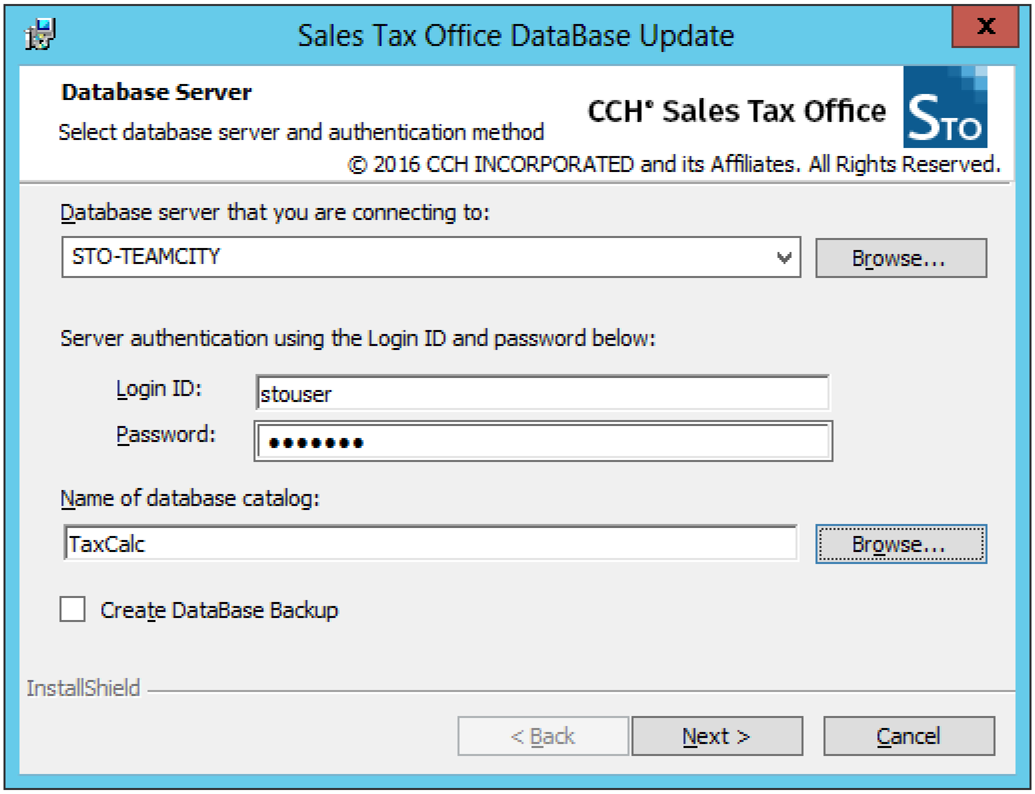
To update an existing installation of Sales Tax Office 4.0, run the installer in the following order:

## Updating the Database

1. Insert the Sales Tax Office Installation CD.
2. Launch **Setup.exe**. The program main installation dialog displays.




3. Click **Sales Tax Office Database Update**. A progress bar displays, and then the Database Server dialog displays.




4. Select the database server, and then enter the Login ID and Password for the server.
5. In the *Name of database catalog* field, click **Browse** and select the **TaxCalc** database.
6. Click **Next**. The Ready to Update the STO Database dialog displays.
7. Click **Update**. The database will be updated to the latest version. When the update is finished, the STO Database Update Wizard Completed dialog displays.
8. Click **Finish**.

## Upgrading the Server

1. From the program main installation dialog, click **Sales Tax Office Server**. A message displays, informing you that the Sales Tax Office Server will be upgraded.
2. Click **Yes** to continue. A message explains that the Sales Tax Office Database installer must be run before the Sales Tax Office Server upgrade is run.
3. Click **OK**. The Resuming the InstallShield Wizard for Sales Tax Office Server dialog displays.
4. Click **Next**. The InstallShield Wizard Completed dialog displays.
5. Click **Finish**.

## Upgrading the API Service

1. From the program main installation dialog, click **Sales Tax Office API Services**. A message displays, informing you that the Sales Tax Office API will be upgraded.

2. Click **Yes** to continue. The Resuming the InstallShield Wizard for Sales Tax Office API dialog displays.
3. Click **Next**. The InstallShield Wizard Completed dialog displays.
4. Click **Finish**.

## Upgrading the Web UI

1. From the program main installation dialog, click **Sales Tax Office Web UI**. A message displays, informing you that the Sales Tax Office Web UI will be upgraded.
2. Click **Yes** to continue. The Resuming the InstallShield Wizard for Sales Tax Office WebUI dialog displays.
3. Click **Next**. The InstallShield Wizard Completed dialog displays.
4. Click **Finish**.

## Verifying the Sales Tax Office Upgrade

To verify that all components have been upgraded, do the following:

1. In Windows, open Control Panel and click **Programs and Features**.
2. Scroll through the list of programs until you get to Sales Tax Office Server, Sales Tax Office API, and Sales Tax Office WebUI, and check the Version column for each item to ensure the correct version is installed.
3. To verify the database has been upgraded, run the following query in the SQL server management studio:

   ```
   " SELECT * FROM [TaxCalc].[dbo].[DBVersion] "
   ```
4. The latest version of the database will be listed in the query results.

Chapter 5

# Chapter 5 — Post-Installation Setup for First Time Users

If you are using Sales Tax Office for the first time, the Admin user must apply a database update and create at least one Company and one Legal Filing Entity.

## Applying a Database Update

To load data files to your database, the data text files must be stored on the application Server machine. You must also have successfully completed the initial data load and must be current in the application of all previous database updates, if applicable.

**Notes**:

- The update text files must be in a folder, and that folder must be in a zipped folder of the same name. For example, if the update files are in a folder named "STO_Update," that folder must be zipped in a "STO_Update.zip" folder. Otherwise, the update will fail.
- Only the Admin user can update the database.
- Only one update can be applied at a time. Simultaneous updates are not allowed.

To apply a database update, the Admin user must do the following:

**Note**: Once an update has been applied, it cannot be removed.

1. Select the **Administration** tab, and then click **Database Updates**.
2. Select **Full Data Load**.
3. Click **Select Import Files**. Your browser's File Upload dialog displays.
4. Provide the data path and select the zipped update file.
5. Click **OK**. The Apply Database Update dialog displays. Any file listed within the File/Table column that has a record count of greater than "0" will contain new data.
6. Click **Update**. A message displays, stating that the file has been received and the update process is running. A progress bar displays, and upon completion of the update process a notification message displays.
7. Click **OK**.

## Creating a Company and Legal Filing Entity

1. Select the **Company Configuration** tab, and then click **Company and Legal Filing Entity** under the Company Configuration section. The Company/Legal Filing Entity page displays.
2. Click **New (+ New)** in the upper left corner of the grid. An editable row displays at the top of the grid.
3. Enter the following information:
   - **Company ID**. Required. The Company ID must be unique within the account.
   - **Description**. Required.
   - **Address 1**
   - **Address 2**
   - **City**
   - **Country**. Required. Select **USA** or **Canada**.
   - **State/Province**. Required. Select the appropriate state or province from the list.
   - **Postal Code**
   - **Plus 4**
   - **Default Group**. Required. Select the default product group from the list.
   - **Default Item**. Required. Select the default product item from the list.
4. Click **Save**. A new child row is created for an LFE.

   **Note**: Every Company must have at least one LFE.

5. Enter the following information:
   - **LFE ID**. Required. Must be unique within the account.
   - **Description**. Required.
   - **Address 1**
   - **Address 2**
   - **City**
   - **Country**. Required. Select **USA** or **Canada**.
   - **State/Province**. Required. Select the appropriate state or province from the list.
   - **Postal Code**
   - **Plus 4**
   - **Default Group**. Required. Select the default product group from the list.
   - **Default Item**. Required. Select the default product item from the list.
6. Click the **Save** button.

Chapter 6

# Chapter 6 — Program Maintenance

Once a program is installed, you have the option of modifying, repairing, or removing it. Program Maintenance actions are available only if you insert the Sales Tax Office Installation CD and the program detects the same version of the software already installed on the machine.

To perform maintenance on a program, do the following:

1. Insert the Sales Tax Office Installation CD.
2. Launch **Setup.exe**. The program main installation dialog displays.

   **Note**: If you have the User Access Control feature turned on, you will be prompted by the operating system to grant the program permission to proceed.

3. Select the program for which you want to perform maintenance by clicking the appropriate program button. The *Preparing to Install...* dialog displays. After verifying compliance with installed components requirements, that dialog closes and the *Welcome to the InstallShield Wizard* dialog displays for the selected program.
4. Click **Next**. The Program Maintenance dialog displays.
5. Click the radio button that represents the action you want to take.
   - **Modify**. Automatically detects and installs any missing features or components.
   - **Repair**. Fixes installation errors such as missing or corrupt files and registry entries.
   - **Remove**. Removes that particular program from the computer.
6. Click **Next**. A dialog displays with the instructions necessary for you to complete the selected Program Maintenance action.
7. Click either **Install** or **Remove**, as appropriate. After the process is finished, a confirmation dialog displays.
8. Click **Finish**. The program main installation dialog displays.