Sovos Adapter for

Magento

Installation Guide

Adapter Version 8.5.1

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CHAPTER

About This Guide

Overview

This chapter provides the following information:

- Audience
- Conventions
- Support and Service

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Audience

This guide is written for users responsible for administration of the Sovos Adapter for Magento.

Conventions

This guide may contain the following conventions for formatting text and code examples:

Typeface	Description	Example
<*variable*>	A variable to be replaced by another name or value.	<*user_name*>
`Command Line Input`	Characters to be input in the command line.	`php`
Menu > Item > Selection	Menu item selection in Taxware Enterprise, Taxify, or another application.	**Organization Administration > Setup > Organization > Legal Entities**

Support and Service

If you have any questions regarding the installation of this product, please contact your Designated Support Contact or call toll free at (866) 890-3971.

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CHAPTER

Installation

Overview

This chapter explains how to install the Sovos Adapter for Magento. It includes the following sections:

- Prerequisites
- Installing the Adapter
- Configuring the Sovos Credentials
- Testing the Installation

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Prerequisites

Before installing the Sovos Adapter for Magento, make sure that the following things are true:

- Your installed Magento instance is version 2.0 or higher.
- If you had previously configured any tax rules in your Magento instance, you have done the following:
    - Back up your data.
    - Either deactivate the tax rules or set the tax rates to zero.
- Your Magento instance uses the system value for all tax classes and settings. To verify this, log in to your instance as an Administrator, navigate to **Stores > Configuration > Sales > Tax**, and confirm that the **Use system value** check box is selected for each value in all of the following sections:

    - Tax Classes
    - Calculation Settings
    - Default Tax Destination Calculation
    - Price Display Settings
    - Shopping Cart Display Settings
    - Orders, Invoices, Credit Memos Display Settings
    - Fixed Product Taxes

Installing the Adapter

To install the Adapter:

1. Upload the folder containing the Adapter's code to the following location in the root directory of the web server in which Magento is installed:

   <WebServer_RootDir>/<Magento_Dir>/app/code

2. Navigate to the root folder of your Magento instance and run the following command to update your instance:

   ```
   php bin/magento setup:upgrade
   ```

3. Optionally, you can delete the static content from the Magento instance, since the Adapter does not utilize those files. To delete the static content, navigate to the web server's root directory (*<WebServer_RootDir>*) and run the following command:

   ```
   bin/php <Magento_Dir> module: enable
   Sovos_TaxCalculation --clear-static-content
   ```


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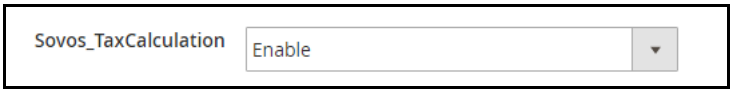
4. Log in to your Magento instance as an Administrator, navigate to **System > Cache Management**, and disable the cache.
5. To verify that the Adapter was installed, navigate to **Stores > Configuration > Advanced > Advanced**. The **Sovos_TaxCalculation** module should appear in the module list.



Configuring the Sovos Credentials

Once the installation is confirmed, please reach out to your Sovos Compliance representative, who will configure your Sovos credentials.

These credentials are required to establish the connection between your Magento instance and TWE or Taxify.

Testing the Installation

Once you have installed the Adapter and configured the Sovos credentials, Sovos recommends that you test that the installation was successful by running a simple transaction.

Note: The following test was performed using example data and Magento's demo user interface. The exact steps required to run a transaction will be determined by your e-commerce platform.

To test the installation, perform the following steps:

1. Log in to your Magento instance as a Customer.

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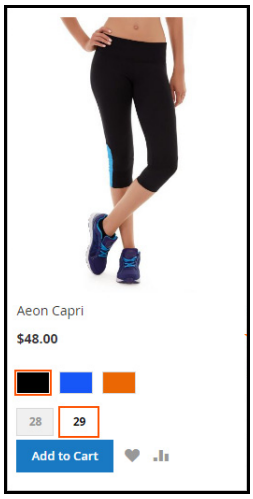
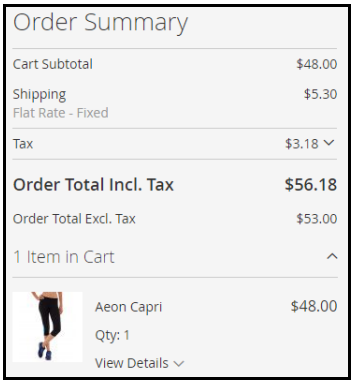
2. Navigate to an item, select the item's specifications and click Add to Cart.



3. Click the icon at the top of the screen and click Go to Checkout.

4. Select a Shipping Address and Shipping Method and click Next.

The Order Summary should display the appropriate tax information.



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