

Installation Guide - TaxCloud Integration

(US and Canada)



Overview

This guide explains how to install and configure the **TaxCloud Canada/US Integration App** for your BigCommerce store.

The app enables tax calculation for both the United States and Canada using TaxCloud.

Requirements

Before installing, ensure you have:

- A BigCommerce store with admin access
- A valid TaxCloud account
- TaxCloud API credentials (Connection ID and API Key)

Step 1: Install the App

1. Go to the BigCommerce App Marketplace
2. Search for **TaxCloud Canada/US Integration**
3. Click **Install**
4. Approve the required permissions

Step 2: Connect Your TaxCloud Account

1. Open the app from your BigCommerce admin
2. Enter your:
 - TaxCloud Connection ID
 - TaxCloud API Key
3. Click **Save Settings**
4. (Optional) Click **Test connection** to verify setup

Step 3: Configure Tax Settings

In the app dashboard:

- Enable **order data submission** (optional, for TaxCloud reporting)
- Configure tax codes for:

- Shipping
- Handling
- Fees
- Default product tax code

These codes determine how different charges are taxed.

Step 4: Enable the Tax Provider in BigCommerce

1. Go to **Settings** → **Tax** in BigCommerce
2. Locate **TaxCloud Canada/US Integration**
3. Click **Enable**
4. Select applicable countries:
 - United States
 - Canada

The app will calculate taxes only for selected regions.

Step 5: Configure Tax Exemptions (Optional)

If you support tax-exempt customers:

- Enable tax exemption handling in the app
- Choose how exemption codes should be applied

Step 6: Test the Setup

We recommend placing test orders:

- Use a US address → verify US tax calculation
- Use a Canadian address → verify GST/PST/HST calculation

Confirm:

- Tax appears correctly at checkout
- Orders are processed without errors

Notes

- Orders outside configured countries will use BigCommerce default tax rules
- Tax accuracy depends on correct TaxCloud configuration
- Ensure your TaxCloud account is properly set up for both US and Canada

Troubleshooting

- **No tax showing:** Check provider is enabled in BigCommerce
- **Connection issues:** Verify API credentials
- **Incorrect tax:** Confirm tax codes and TaxCloud configuration

Support

If you need help with setup or configuration:

Email: info@lantera.co

Website: <https://lantera.co>