New project to expand the tax calcs…

Starting Date: 6/15/17

Branch: BWM-28

Things that need to be done:

* Build the database update page (script it)
  + Add new fields for 6 – 10 on custom tax fields
  + Add new fields for all 10 limit by customer type list fields
  + Change all decimal(5,2) fields to decimal(8,5) – this is for 5 decimal places
  + Update all new store\_location lists to the value of “all”
  + Script the quote line items changes
    - Change all columns that collect taxes to 5 decimals.
    - Add a new column to help with tax rounding so we don’t have to hurt the state tax calc field.
    - Run the script to update all line items
    - We have some new mini conversion stuff… maybe think about getting all of the new tweaks done at once.
    - We may want to run the dollars off discount stuff as well
  + Script the invoice line items changes (this is corp-specific) this will be a big click, click, click migration.
    - Change all columns that collect taxes to 5 decimals.
    - Add a new column to help with tax rounding so we don’t have to hurt the state tax calc field.
    - Run the script to update all line items – this will be big
    - We have some new mini conversion stuff… maybe think about getting all of the new tweaks done at once.
    - We may want to run the dollars off discount stuff as well
  + Add the database update script. The link was missing as of 6/15/17. We want to record this change as it is fairly big.
* Work on the add\_edit\_store.cfm page…
  + Add the new 6 – 10 custom values
  + Add the new 1 – 10 customer type lists with builders
    - Make sure that builders work… default to All
  + Expand the samples for the percentages, expand the max number of digits for the percentage fields. Maybe show a max of 5 decimal places
  + There is both add and edit modes… both need to be updated and checked.
  + Maybe help format things back to the user so that they can see that there are 5 decimal points of accuracy
  + The body will be in the secure/classic folder
* Add the new values to the action page add\_edit\_store\_action.cfm
  + Setup new params, validation, update loops, etc.
  + Add new fields to the add method and the update method
* Go over the calculateTaxes method with a fine tooth comb. This is the main crux of the system and all taxes are calculated
  + Very important to check the number of decimals and run through tons of different scenarios…
  + Add the new logic for the limit by customer types – test this out
  + Follow all occurrances of this method… you will have internal carts, invoices after the fact, edits on invoice line items, recipe stuff, and ecommerce. Most things have a way to add them, a way to update them one by one, and a way to update things in bulk.
* There is some JavaScript that calculates taxes on the advanced add to cart page, the advanced edit cart page, and even my cart favorite buttons (backing into taxes)
* Things get crazy with discounts…
  + This may need to be expanded and looked into
* We have add to cart stuff
  + Follow every known option in… basic search, advanced searches, view items, all kinds of barcodes, my cart favorite buttons (all different types), QR codes, sub inventory, recipes, restore to cart, duplicate to cart, etc.
  + We have to go through the stock/unit sales process… That is a multi step process for big ticket items.
  + Lots of new math calcs and changing tons of formatting
* We have edit or update cart stuff
  + Similar cascading things and checking all kinds of angles
* We will have printable quote stuff. Normal and PDF and ecommerce
* We will have printable invoice stuff. There are multiple versions of the invoice. There is normal, printer friendly, limited, summary, mini version, PDF, ecommerce. There may be more…
* We will have report stuff. This could get pretty deep…
  + Sales tax reports (4 different layers)
  + Advanced invoice line searches
  + Super advanced invoice line searches
  + Sums and other values cascaded around to sales reports, daily/weekly, and even Balance Sheet totals.