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MBA 614

Sales and Use Tax Return Facilitator

Executive Summary

Taxes are an essential part of any well developed society, but tax laws are often very complex, tedious and downright boring. This often makes filing tax returns an unwelcomed and frustrating chore for individuals and businesses. My project is a program to help facilitate filling out sales and use tax returns. It allows the user to fill out their sales and use tax returns for 2011 and the first quarter of 2012 by simply entering data into the required fields. The user can put a copy of the return in their printer, press the "Print" button and the return will print with all of the necessary data.

Implementation Documentation

Depending on whether the user has one or several places of business they can choose which form they need to fill out. Currently the program is only fully functional for the TC-62S form. The forms for multiple places of business are not fully functional at this time.

Sales Tax Return Forms

Single Place of Business

TC-62S Main Form	Insert/Edit Data	Print
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Multiple Places of Business

TC-62M Main Form	Insert/Edit Data	Print	
Schedule A	Insert Data	Edit	Print
Schedule AG	Insert Data	Edit	Print
Schedule J	Insert Data	Edit	Print
Schedule JG	Insert Data	Edit	Print
Schedule X	Insert Data	Edit	Print

If the user has only one location of business then they will select the TC-62S form by clicking on the “Insert/Edit Data” button located to the right of that description. This will bring up the user form below.

TC-62S Main Form

Company Name

Company Address

Company City, State, and Zip Code

Account Number

Year

Period

Total Sales of Goods and Services

Exempt Sales Included in Total Sales

Goods Purchased Tax Free and Used by You

Adjustments (Attach an explanation showing figures)

Non-Food and Prepared Food Sales Location of Sales

Grocery Food Sales

Residential Fuel Included in Sales and Purchases

Enter Clear Form Close

The user fills out the required fields in this user form.

Year

Period

Total Sales of Goods and Services

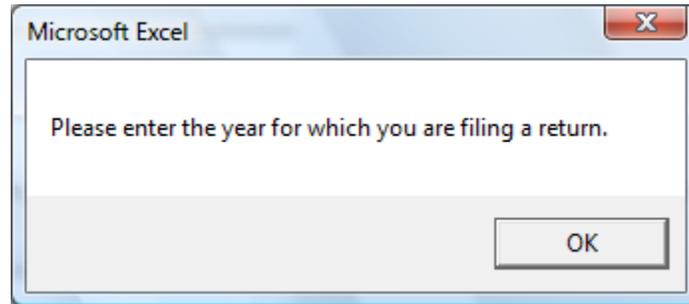
Exempt Sales Included in Total Sales

Goods Purchased Tax Free and Used by You

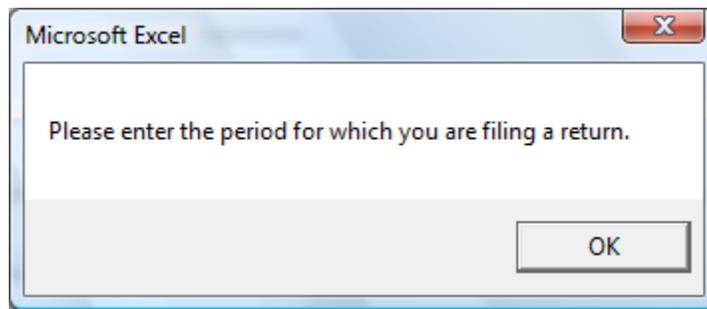
Adjustments (Attach an explanation showing figures)

1st Quarter
2nd Quarter
3rd Quarter
4th Quarter
January
February
March
April

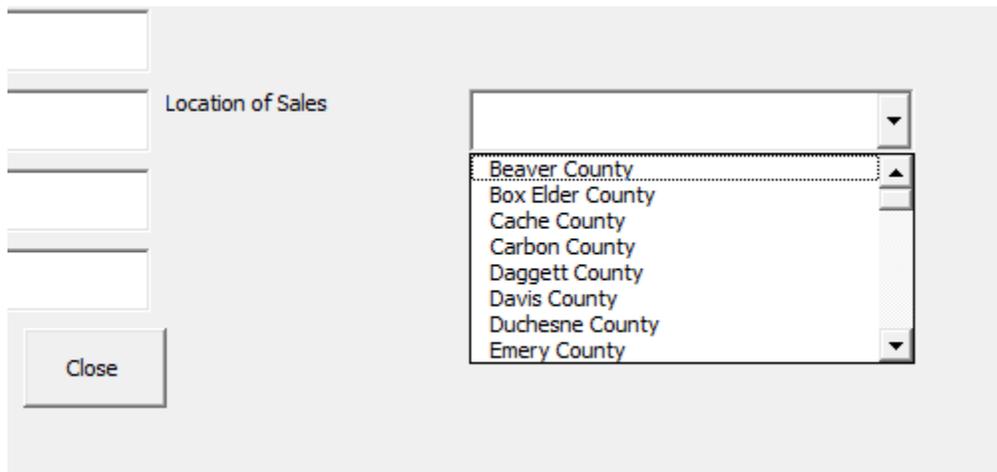
The Year and Period fields are very important and should contain only specific entries. For this reason they are pre-populated with those specific entries as shown above.



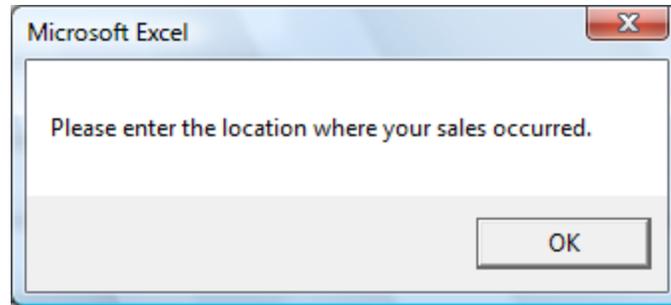
If the Year field is left blank the following message box will appear and will not allow the user to move on until the year field is populated.



The Period field cannot be left blank either. A similar message box appears if it is not populated.



Just as the Year and Period fields are pre-populated with specific choices, so is the Location of Sales field. This field is what determines the tax rate to be used.



If the Location of Sales field is left blank then a message box appears informing the user that they need to enter a value into the field. Once all of the fields for the form have been populated, all the user has to do is press the “Enter” button and then close the user form. Then the user just has to insert a blank copy of their sales and use tax return into their printer and push the “Print” button on the first user form.

This portion of the program is still not completely functional, but I will still walk through it as if it was. If the user has multiple places of business then they must fill out the TC-62M form. They do this by clicking on the “Insert/Edit” button which will bring up the user form below.

A screenshot of a software window titled "TC-62M Main Form". The window has a standard Windows-style title bar with a close button (X) in the top right corner. The form contains several input fields and two dropdown menus. The fields are labeled as follows: "Company Name" (with a cursor in the input box), "Company Address", "Company City, State, and Zip Code", "Account Number", "Year" (with a dropdown arrow), "Period" (with a dropdown arrow), "Total Sales of Goods and Services" (with the value "0"), "Exempt Sales Included in Total Sales" (with the value "0"), "Goods Purchased Tax Free and Used by You" (with the value "0"), "Adjustments (Attach an explanation showing figures)" (with the value "0"), and "Residential Fuel Included in Sales and Purchases" (with the value "0"). At the bottom of the form, there are three buttons: "Save", "Clear Form", and "Close".

Similar to the previous form demonstrated, the user simply fills out the fields in the user form. If the user has multiple places of business then they will be required to fill out at least one of the schedules listed below TC-62M on the first user form. The user forms for filling out Schedule A are shown below. Schedule AG has the exact same format for its user form.

The screenshot shows a dialog box titled "Insert Data Schedule A". It contains the following fields and controls:

- Business Location Address:** A text input field with a vertical cursor.
- Business Location City, State, Zip Code:** A text input field.
- Outlet Number:** A text input field.
- Net Taxable Sales and Purchases:** A text input field containing the number "0".
- Location of Transaction:** A dropdown menu.
- Buttons:** "Insert Data" and "Close" buttons at the bottom.

This is a close-up of the "Location of Transaction" dropdown menu. The list of locations is as follows:

- Hooper
- Howell
- Huntington
- Huntsville
- Hurricane
- Hyde Park
- Hyrum
- Independence

As with the other user forms, the user simply has to fill out the required fields and press "Insert Data" and close the user form.

The screenshot shows a software window titled "Edit Schedule A". It contains the following fields and controls:

- Business Location Address:** Text input field containing "500 S. State Street".
- Business Location City, State, Zip Code:** Text input field containing "Orem, UT 84624".
- Outlet Number:** Text input field containing "2".
- Net Taxable Sales and Purchases:** Text input field containing "15455".
- Location of Transaction:** Dropdown menu with "American Fork" selected.
- Navigation Buttons:** "Next Record", "Previous Record", and "Save Changes for this Record" are arranged horizontally.
- Action Buttons:** "Delete Record" and "Close" are positioned below the navigation buttons.

To edit Schedule A or Schedule AG, the user pushes the “Edit” button on the first user form. The user can sort through your entries on these schedules by pressing “Next Record” or “Previous Record”. The user can save any changes they make by clicking on the “Save Changes for this Record” button. The user can delete a selected record by clicking on the “Delete Record” button.

The screenshot shows a software window titled "Insert Data Schedule J". It contains the following fields and controls:

- Location of Transaction:** Dropdown menu with a blank selection.
- Net Taxable Sales and Purchases:** Text input field containing "0".
- Action Buttons:** "Insert Data" and "Close" are positioned below the input fields.

Location of Transaction

Net Taxable Sales and Purchases

- Wayne County
- Weber County
- Alpine
- Alta
- Altamont
- Alton
- Amalga
- American Fork

Schedules “J”, “JG”, and “X” have the same user form as shown above.

Edit Schedule J

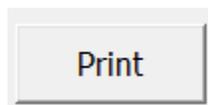
Location of Transaction: Bear River

Net Taxable Sales and Purchases: 23000

Next Record Previous Record Save Changes for this Record

Delete Record Close

The entries for these schedules can be edited in the same way as Schedule A and Schedule AG shown above.



Once the user has filled out all of the necessary user forms, they can print out the completed returns by clicking the “Print” buttons for those returns.

Learning and Conceptual Difficulties

This project was definitely a challenge for me. I learned a lot throughout the course of the project and there were many moments of satisfaction when things worked the way that they were

intended to. There were also a lot of conceptual difficulties that left me frustrated and that I wasn't always able to resolve.

Originally part of the project was going to be actually submitting the sales tax return online through a Utah State Tax Commission account. I went to the local tax commission office and filed paper work to get a sales tax license so that I could get an online sales tax account. It was soon thereafter that I found out that the Utah State Tax Commission uses Microsoft Silverlight to run their online accounts instead of just your normal html. This made it so that I couldn't get access to the source code behind their web pages in order to run the internet explorer agent. I tried googling a solution, but to no avail. After discussing it with Professor Allen, we came to the conclusion that there was no immediate answer to getting around the problem and that submitting the tax return online would not be a part of my project.

One of the tools that I learned about is the FormulaR1C1 property for relative references of cells. Prior to reading about this property in the textbook I was only using the offset property for the relative reference of cells. I ended up using FormulaR1C1 for relative references in several parts of my project because it was easier to write the code using it than the offset property would have been.