<place application logo screen shot> <place Avalara logo>

Avalara AvaTax for [My Application]

# Configuration/User Guide

Avalara AvaTax is a cloud-based solution automating transaction tax calculations and the tax filing process. Avalara provides real-time tax calculation using tax content from more than 12,000 US taxing jurisdictions and over 200 countries, insuring your transaction tax is calculated based on the most current tax rules.

## Connect to AvaTax

After installing the AvaTax integration you need to configure the integration

1. Go to [Settings] > [Tax]
2. Click [Sign in]
3. Enter your Avalara AvaTax Credentials:

[replace image with screen capture from integration user interface]

* + **Account Number:** Provided during your AvaTax account activation process.
	+ **Software License Key:** Provided during your AvaTax account activation process
	+ **Service URL:** URL to connect to the Development or Production AvaTax services
	+ **Company Code/ID:** Company profile identifier in the AvaTax Admin Console.
1. Click the **Test Connect button**.

## Configure Avalara AvaTax

Once connected, you see additional settings.

* **Disable Tax Calculation -** Turn off the AvaTax calculation service.
* **Enable Document Committing/Submission –** Enables tax document submission to Avalara’s AvaTax service for record keeping. With this setting enabled, transactions will be posted and committed to the AvaTax Admin Console.
* **Default Freight Code –** The default Avalara AvaTax System Tax code used for Freight/Shipping.
* **Enable Logging –** Log detailed transaction activity for troubleshooting purposes. Enable only when instructed by support.
* **Link to AvaTax Admin Console –** Access the Avalara AvaTax Admin Console

[replace image with screen capture from integration user interface]

* **[Address Validation] –** Option to enable or disable address validation]
* **[Address Validation Filter by country] –** choose which countries will be used for Address Validation]

## Assig an Avalara tax exempt category to a customer

1. Click [Customers] > [Customer Listing]
2. Click a customer record to enter the customer detail
3. Click [Edit]
	* In the [Tax Exemption Number]field**,** enter the customer’s exemption number.
	* In the [Tax Exempt Category]field, select the appropriate customer type letter code.

A - Federal government (United States)

B - State government (United States)

[replace image with screen capture from integration user interface]

C - Tribe / Status Indian / Indian Band (both)

D - Foreign diplomat (both)

E - Charitable or benevolent org (both)

F - Religious or educational org (both)

G - Resale (both)

H - Commercial agricultural production (both)

I - Industrial production / manufacturer (both)

J - Direct pay permit (United States)

K - Direct mail (United States)

L - Other (both)

M - Not Used

N - Local government (United States)

O - Not Used

P - Commercial aquaculture (Canada)

Q - Commercial Fishery (Canada)

R - Non-resident (Canada)

1. Click **Save**.

## Assign an AvaTax System Tax Code to an item

1. Go to [Catalogue] > [Products]
2. Select a Product to open the Product details screen.
3. Click [Edit]
4. On the Product details screen, enter the applicable AvaTax System Tax Code in the [Tax Code] field.

[replace image with screen capture from integration user interface]

1. Click **Save.**
2. To see a listing of all available AvaTax System tax codes, click (<http://taxcode.avatax.avalara.com>).

## Validate a customer address

1. Click [Customers] > [Customer Listing]



1. Click a customer record to enter the customer detail screen.
2. Click [Edit]
3. On the [Address Tab] click the [Validate Address] **button**.
4. Review the returned validated address, click the **Update b**utton to update the customer record with the returned address.

[replace image with screen capture from integration user interface]

1. Click **Save**.