Avalara AvaTax

Implementation Toolkit

Avalara

Tax compliance done right

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Welcome to Avalara

On behalf of everyone at Avalara, welcome! We want to ensure your implementation of Avalara AvaTax is successful, so we've put together this toolkit. It provides you with information you need to implement Avalara AvaTax and integrate it with your other business systems. Follow the steps outlined here and you'll be well on your way to tax compliance done right.

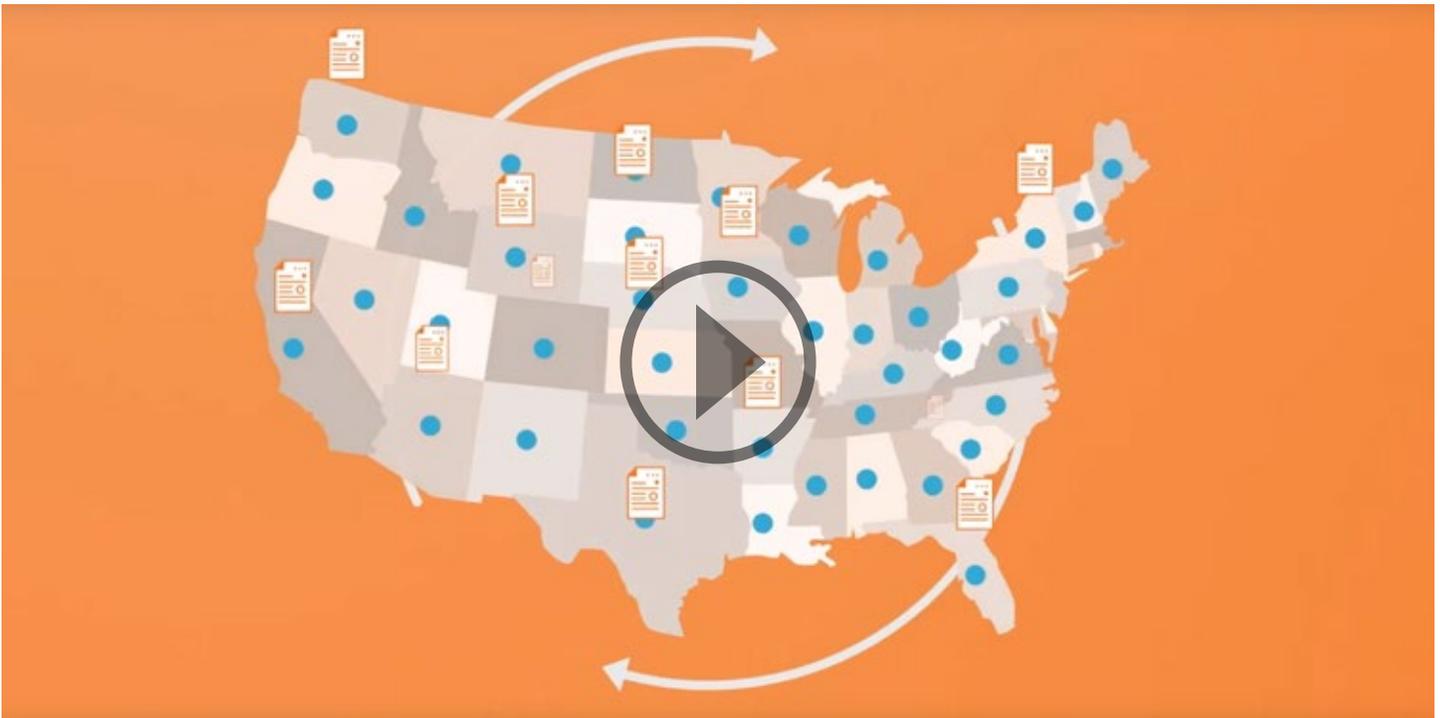TIP: Use the tabs at the top of this guide to easily navigate between sections.

What is Avalara AvaTax?

Avalara AvaTax is a cloud-based software solution that delivers sales tax calculations within existing business applications at the time of checkout or billing. Automating sales tax calculations with AvaTax helps businesses calculate sales tax based on regularly updated tax rates and rules, across 12,000+ U.S. sales tax jurisdictions at the point of transaction. Further, AvaTax works seamlessly through more than 600 integrations with the most commonly used business applications including ERP, point of sale, ecommerce, billing, CRM, and accounting systems. AvaTax helps you tame the complexity of sales tax, so you can focus on growing your business.

Before you begin

Before we dive into the steps for implementation, it's important you understand your role in the implementation process and the typical milestones you'll check off as you go. Take a moment to watch the video below so you're fully prepared to implement AvaTax.

Please note: This toolkit was developed for the person at your organization responsible for implementing Avalara AvaTax. If that's not you, please pass it along to the correct person.

Your implementation resources

As an Avalara customer, you have an entire team to support you and help maximize your investment with our products and services. In addition to your Avalara team, we have the Avalara Help Center, a robust, online resource with information whenever you need it. Within the help center is the AvaTax user guide, where you'll find answers to some of the most common questions we hear, so use it as your first point of reference.

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Make sure to bookmark the Avalara Help Center.

Beyond the Avalara Help Center, your supporting Avalara team includes:

Implementation Specialist

Your Implementation Specialist is your main point contact as you implement AvaTax. Your Implementation Specialist is here to help you:

- Define a timeline for your implementation plan and ensure you're hitting the milestones necessary to meet your deadlines
- Direct you to the appropriate resources to help you implement AvaTax
- Help you understand how AvaTax translates and uses your business data to calculate sales tax

Your Implementation Specialist won't be setting up your instance of AvaTax for you and can't provide you with tax advice. Your Implementation Specialist will reach out soon to set up a kickoff call to gain a better understanding of your business objectives and timelines. However, you can get started on your implementation prior to that call by following the steps outlined in next section of this kit, Implementation milestones.

Avalara Account Manager

Your Avalara Account Manager is your primary contact once you've completed your AvaTax implementation and ensures our services continue to meet your business's needs now and as it continues to grow. Your Account Manager can work with you to:

- Reevaluate your policies, processes, and tax profile as your business needs evolve
- Review your product usage and subscription plans
- Provide additional solutions to help your business manage tax compliance

Connect with your Account Manager at least once a year to discuss changes in your business and how Avalara can help. Your account manager will work to ensure you receive the maximum value from your investment in Avalara, but cannot provide technical support or tax advice. However, if you need tax advice, your Account Manager can connect you with our Professional Services team, and they can provide guidance.

Avalara Product Support

The Avalara Product Support team is here to help with technical challenges and product functionality. Product Support is available to:

- Answer technical questions about Avalara product functionality
- Assist with technical issues or questions about Avalara product workflow
- Ensure support cases move along to resolution

You can reach Avalara Product Support by phone, email, chat, and online forms. However, most questions can be answered by visiting the Avalara Help Center. Bookmark the help center and use it as your first point of reference. If you can't find your answer in the help center, contact support.

Please note that the Avalara Product Support team has defined response times for requests and does not provide tax advice.

Avalara Professional Services

The Avalara Professional Services team can help with matters related to sales tax compliance or the implementation of your Avalara solutions. Deciphering your sales tax obligations and managing the tasks related to remaining compliant can be arduous. The Avalara Professional Services team helps customers:

- Understand changing tax obligations and navigate the responsibilities related to maintaining tax compliance
- Integrate new ERP, CRM, point-of-sale (POS), accounting, or ecommerce software with Avalara products and services
- Manage and maintain exemption certificates

The Avalara Professional Services team works on a project-by-project basis. For more information about the services provided by the Avalara Professional Services team, contact your Account Manager to scope your request and get started.

Implementation milestones

Implementation of Avalara AvaTax typically involves four main milestones to completion: collecting your business and tax profile information, setting up your AvaTax account, connecting AvaTax to your other business systems, and refining your tax profile.

These milestones summarized below have links to the more detailed, step-by-step instructions to help you complete implementation. If you have an AvaTax Sandbox account, follow the milestones to configure and test your Sandbox account. When you're ready, your Implementation Specialist will copy your setup to your production account.

1 ## Milestone 1: Collect your business and tax profile information

AvaTax needs information related to your business and tax profile to be configured properly. Before you log in to begin setup, we highly recommend you gather all of the items listed in Milestone 1 as they're all necessary for a successful implementation.

Get Detailed Instructions For Milestone 1 →

2 ## Milestone 2: Set up your AvaTax account

Once you've gathered your business and tax profile information, it's time to get started working with the product. In this milestone, you'll walk through the AvaTax setup wizard and configure items such as your business location and where you collect and remit tax.

Get Detailed Instructions For Milestone 2 →

3 ## Milestone 3: Connect AvaTax to your other business systems

Now that your AvaTax account is set up and AvaTax knows where you're collecting tax, you'll need to connect AvaTax to your other business systems where orders are processed or stored.

Get Detailed Instructions For Milestone 3 →

4 ## Milestone 4: Refine your tax profile

Knowing where AvaTax should calculate and collect tax for your business is critical, but there are additional aspects of your tax profile that are also important to configure correctly. In this milestone, you'll further refine your business profile within AvaTax by telling AvaTax more about the products you sell and your company locations.

Get Detailed Instructions For Milestone 4 →

If you have additional questions while you're working through your implementation, review the videos on Avalara University, or reach out to your Implementation Specialist.

Once you've completed the milestones in the four sections above, you've completed your AvaTax implementation. Congratulations!

Other items to consider

As you wrap up your implementation of Avalara AvaTax, there are some other items you should think about and some helpful resources you should make sure to bookmark.

Helpful links

Make sure to bookmark the links below, as these are helpful resources for all Avalara customers as you utilize our products and services.

Avalara Login

You'll log in to your Avalara account to manage account settings, run reports, and make updates to your tax profile.

The Customer Center

The Avalara Customer Center is the main resource for customers to stay informed on everything Avalara, as well as important industry news.

The Avalara Help Center

The Avalara Help Center is your go-to resource for answers to questions about AvaTax and other Avalara products and solutions, including the top questions we hear from Avalara customers. The Help Center should be your first stop for questions about product functionality.

Avalara University

Avalara University provides online classroom training sessions on the most common customer questions, and dives deep into topics to help you set up and utilize Avalara solutions.

Redundancy planning

As a cloud-based software as a service provider, Avalara understands the need to ensure our services are available continuously and to respond in a timely manner in the rare instance of an outage. However, there may be instances of latency in call response or service outages, and in these scenarios, it's important to ensure you can still make tax calculations without interrupted service.

Avalara's average uptime for the 12 months ending September 30, 2017, was 99.96%.

Though service outages are rare, it's a good idea to have a fallback plan in place to continue calculating tax in the case that your software can't connect to AvaTax. There are options available for calculating tax offline, and we've outlined a few recommendations here to help you determine what's right for your business.

Subscribe to updates from the Avalara status page so you can see if Avalara products are functioning as expected.

The rest of your tax compliance picture

Now that you're up and running with AvaTax, you've got tax calculation covered. But do you have a plan in place to manage the rest of your sales tax compliance picture? Avalara offers additional tools to help you manage end-to-end sales tax compliance.

Tax document management

Minimize audit risks and penalties with a complete tax document management solution from Avalara. With Avalara CertCapture, you can collect, store, manage, and renew tax documents from your vendors and buyers safely in the cloud, instead of dealing with a mess of digital or paper files.

Tax filing

Streamline your filing process with automated returns preparation, filing, and remittance from Avalara. Avalara Returns prepares and files your sales tax returns with a higher degree of accuracy than doing it yourself – and in a fraction of the time.

Professional services

Avalara offers Professional Services, including Tax Advisory Services, Managed Services, Implementation Services, and Support Plans and Training to help customers prepare for and achieve compliance with a variety of options.

Get going

You're now on your way to more accurate and efficient sales tax calculations for your transactions, in real time. If you have any questions or if you're having trouble navigating any of your solutions, please use the appropriate references listed on page 5 in this toolkit.

And if you have feedback on how we could make the Avalara AvaTax Implementation Toolkit more useful or have suggestions on additional items to include, please let us know. We appreciate that your company chose Avalara for your tax calculation and compliance needs and we welcome the opportunity to assist you further. Thank you!

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