Avalara – U9

Update 9 Avalara Implementation Guide

| Step # | Navigation & Action | Additional Actions / Input  | Comments / Expected Results |
| --- | --- | --- | --- |
|  |  |  |  |
| 1.00 | **►Navigation** **Common Data > Common Tables > Taxes > Tax Rates** | Create NT tax rate for Exempt products |  |
|  | Tax Type: VAT |  |  |
|  | VAT Type: On Debit |  |  |
|  | Accounting Code: STD |  |  |
|  | Taxation table below to be blank |  |  |
|  |  |
|  |  |
|  | **►Navigation** **Development > Data & Parameters > Miscellaneous Tables** | Table: 203 – SST Tax Code |  |
|  | CODE: NT – Non-taxable |  |  |
|  | CODE: TAX - Taxable |  |  |
|  |  |  |  |
|  | **►Navigation** **Setup > General Parameters > Parameter Values** | TC > VAT > EXETAX = EXE |  |
|  |  |  |  |
|  | **►Navigation** **Declarations > Tax Management > United States > Sage Sales Tax Initialization** | FUNSSTENT | Ensure all boxes are checked |
|  |  |  |  |
|  | **►Navigation** **Setup > Usage > Sage Sales Tax > Sage Sales Tax Connection** | GESLTP | Using Welcome Letter from Avalara to customer enter the TEST URL, Account Number, License Key |
|  | Calculate all Documents |  | Yes - The ‘Yes’ setting will send all quotes, orders, shippers and invoice lines through to Sage Sales Tax regardless of their taxable status within X3. |
|  | Validate address mandatory |  | Yes - Yes’, as addresses are entered or modified in X3, they will be sent to Sage Sales Tax for validation. If set to ‘No’, addresses remain un-validated during these same steps. |
|  | URL Type | TEST – for implementation | Change to Production during Go Live |
|  | Click SAVE |  |  |
|  | Once Saved, Ping Sage Sales Tax |  | Connection successful?  |
|  |  |  |  |
|  | **►Navigation** **Common Data > BPs > Customer – Address tab** | Street address should be in Address Line 1 to avoid validation issues | Sage Sales Tax address validation returns address lines which conform to USPS standards. |
|  | *Common Data > BPs > Utilities > Address Validation* | Recommend running this utility after BP master data has been imported.  | *Highly recommended before Pilots/Dry Run to avoid persistent errors.*  |
|  |  |  |  |
|  | **►Navigation** **Common Data > Common Tables > Taxes > Tax Rates** | It is recommended that two Tax Rates be created: NT: Non – taxableTAX: Taxable |  |
|  |  |  |  |
|  | **►Navigation** **Common Data > Common Tables > Taxes > BP Tax Rule** | It is recommended that two BP Tax Rules be created: NT: Non – taxable BPTAX: Taxable BP | To be assigned to BP (Customer) |
|  | 🗸 Active |  |  |
|  | Tax Type: VAT |  |  |
|  | VAT Type: On Debit |  |  |
|  | Accounting Code: STD | Ensure Accounting Code is directed to Tax Liability GL account |  |
|  | Taxation table as seen below |  |  |
|  |  |
|  | Tax Code: TAX (from Step 6.00) |  |  |
|  |  |  |  |
|  | **►Navigation** **Common Data > Common Tables > Taxes > Tax Level** | It is recommended that two Tax Levels be created: NT: Non – taxableTAX: Taxable | To be assigned to Products |
|  | 🗸 Active |  |  |
|  | Tax Code: TAX (from Step 6.00) |  |  |
|  |  |  |  |
|  | **►Navigation** **Common Data > Common Tables > Taxes > Tax Determination** | Create all possible BP\_Product combinations  | Possible combinations:TAX\_TAX – used for Sage Sales Tax = tax calculatedTAX\_NT: Taxable BP/Nontaxable Product = 0 taxNT\_TAX: Nontaxable BP/Taxable Product = 0 tax |
|  | 🗸 Active |  |  |
|  | Tax Type: VAT |  |  |
|  | BP Tax Rule: TAX |  |  |
|  | Product Tax Level: TAX |  |  |
|  | Tax: TAX |  |  |
|  |  |  |  |
|  | **►Navigation** **Common Data > BPs > Customers – Financial tab** | Assign appropriate taxation to BP | Recommend assigning to Customer Category |
|  | Financial tab: for NT Customer, enter Exemption No. | **IMPORTANT NOTE:** Exemption numbers must be loaded in Sage Sales Tax console to stop tax calculations | Customer Responsibility |
|  | Address tab: enter address and click Validation icon |  |  |
|  |  |  |  |
|  | **►Navigation** **Common Data > Products > Products – Financial Tab** | Assign appropriate taxation to Product | Recommend assigning to Product Category |
|  |  |  |  |
|  | **►Navigation** **Setup > Sales > Invoicing Elements** | Determine which Elements are taxable |  |
|  | Calculation Base: Must be set to ‘Before Tax Calculation’ |  |  |
|  | Tax Rule: Must be set to ‘Fixed Rate’ |  |  |
|  | Element Tax Level: Must be set to a taxable ‘TAX’ |  |  |
|  | Shown In: Must be set to ‘Tax excluded’ when the field is available for editing |  |  |
|  | SST Tax Code: TAX |  |  |
|  |  |  |  |
|  | **►Navigation** **Reports > Reports > NA-SALESTAX** | Select Company, Tax Code, & date range |  |
|  |  |  |  |