

# Setting Up Avalara Integrations

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This guide explains the steps to configure your aACE system for integration with Avalara services AvaTax and CertCapture. It is intended for system administrators.

Before configuring your system for the [aACE+ AvaTax and aACE+ CertCapture Integrations](#) (<https://aace6.knowledgeowl.com/help/overview-of-aace-plus-avatax-integration>), you should be familiar with [aACE's tax profile functionality](#) (<https://aace6.knowledgeowl.com/help/overview-of-tax-profiles>). The AvaTax integration can work with your tax profiles in various ways:

- A single tax profile can be set as the default for all orders to rely on AvaTax exclusively.
- Specific tax profiles can be set up for all states where you have nexus, drawing tax rates from AvaTax.
- Additional tax profiles can be set up for jurisdictions where you are *not* responsible for collecting sales tax. These tax profiles should be set to 0% to prevent unnecessary requests to AvaTax. This can help reduce the expense of your AvaTax subscription.

Note: AvaTax also provides functionality to [file your state taxes](#) (<https://aace6.knowledgeowl.com/help/filing-your-taxes-using-avatax>), which may affect your decisions for configuring this integration.

Additionally, CertCapture works with your Company records for organizations that have been [flagged as tax exempt](#) (<https://aace6.knowledgeowl.com/help/flagging-companies-as-tax-exempt>).

## Steps for AvaTax and CertCapture Integration

aACE+ Avalara AvaTax integration addresses your sales tax challenges with a cloud-based service that calculates sales and use tax, files returns, and remits payments across North America and beyond. aACE+ Avalara CertCapture automates your exemption certificate management to ensure your documentation is always up-to-date.

For your aACE+ Avalara integration, proceed with the following steps:

1. [Create your AvaTax account](#)
2. [Configure aACE+ AvaTax settings](#)
3. [Configure aACE office settings](#)
4. [Configure aACE line item code settings](#)
5. [Configure aACE tax profiles](#)

Note: The purpose of this process is to help ensure you are *not* charged for unneeded tax data requests. Avalara charges for *each* request that is submitted. If a certain office, line item code, or tax profile should not be taxed, there is no need to request tax data for it. The time you invest in configuring your AvaTax integration can reduce your expenses.

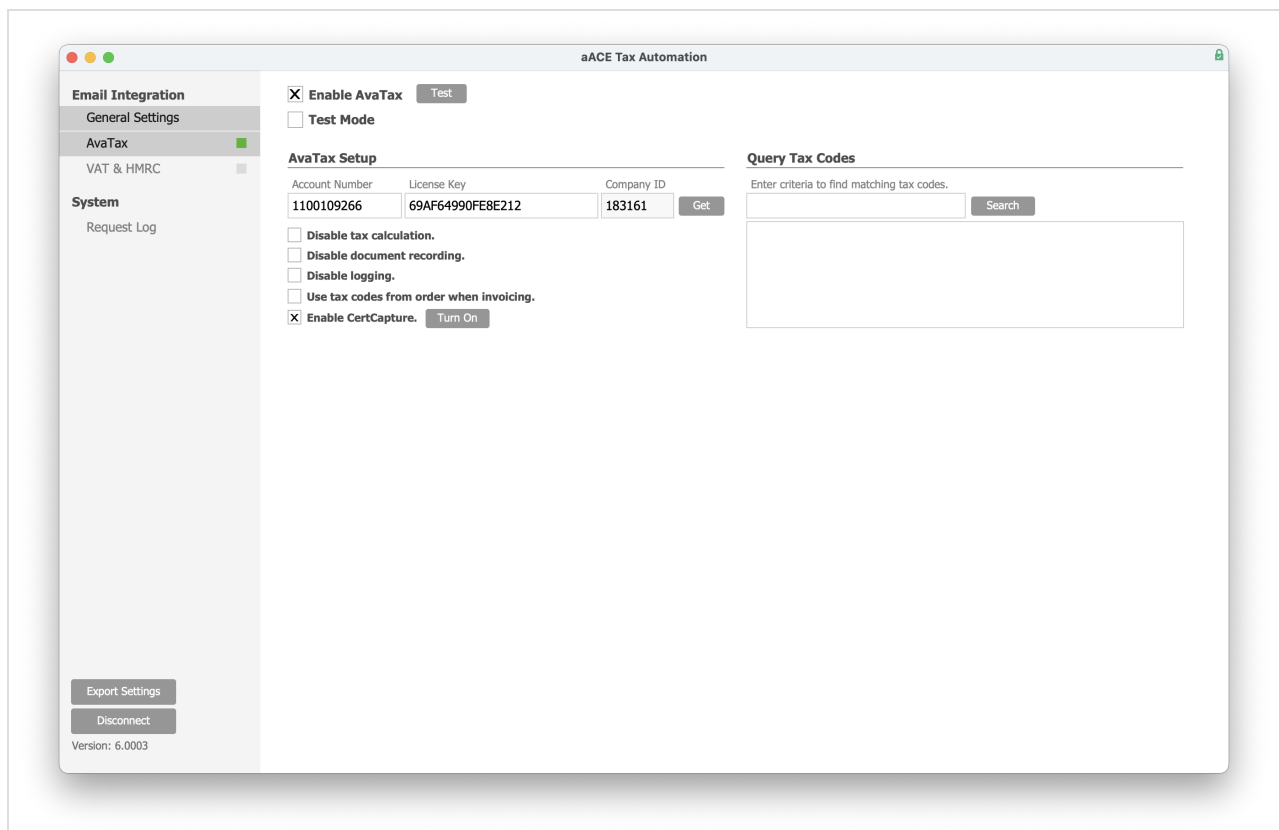
## 1. Creating an AvaTax Account

Contact an Avalara representative to set up your AvaTax account at [www.avalara.com](http://www.avalara.com) (<http://www.avalara.com/>). Explain that you require an "aACE Connector". Your account representative will provide this and other details on how to create your account and obtain the needed credentials.

Note: After you receive your credentials (e.g. account number, license key, etc), keep the information secured. You will use it later in setting up your aACE+ AvaTax integration.

## 2. Configuring AvaTax Preferences

To enter your AvaTax credentials and basic setup information, navigate from Main Menu > System Admin > aACE Tax Automation > AvaTax:



## Avalara Setup

- **Enable AvaTax** – Mark this flag to set other integration details.
- **Test Button** – After entering your credentials, you can click this button to verify your connection.
- **Test Mode** – If you are working with aACE in a sandbox environment, you may need to activate Test Mode. Otherwise, leave this flag cleared. Test mode will *not* correctly access an AvaTax production account.
- **Account Number, License Key, and Company Identifier** – Enter the Account Number and License Key, then press **Get** to populate the Company ID field.  
Note: The Company Identifier field is for the Avalara CertCapture integration and may be left blank when configuring aACE for the AvaTax integration.
- **Disable tax calculation** – Mark this flag to turn *off* automatic tax calculations when saving orders and invoices.
- **Disable document recording** – Mark this flag to get tax estimates *without* saving the invoice details in AvaTax.
- **Disable logging** – Mark this flag to turn *off* automatic logging. When logging is enabled, aACE will store a *complete* log of the raw request sent to AvaTax and raw data received in response.
- **Use tax codes from order when invoicing** – Mark this flag to pull the AvaTax code from the related order item instead of the line item code (LIC). This keeps the tax codes consistent between the order and the invoice, even if the LIC settings change between when an order is placed and when it is invoiced.
- **Enable CertCapture** – Mark this flag to enable aACE's CertCapture integration.
- **Turn On Button** – After entering your CertCapture credentials in the Company Identifier field above, you can click this button to turn on CertCapture.

## Querying Tax Codes

In order to manually query the tax codes for a particular LIC or group of LICs, follow these steps:

1. Enter the keyword for the LIC you wish to update in the Query Tax Codes field and click Search.
2. The field below will populate with matching tax codes from your AvaTax account. Highlight the abbreviation of the relevant tax code and copy it to your clipboard. Then refer to the steps outline in "Configuring Line Items Codes" below.

Note: If you encounter difficulties with connecting to AvaTax, contact your Avalara representative.

### 3. Configuring Offices

You can set up multiple business entities to access your AvaTax account. aACE 'office' records correspond to AvaTax 'company' records. Note: This does *not* use your AvaTax Company ID. Instead, your Company Code can be found by logging in to your AvaTax portal and navigating to Company Settings.

After you have your AvaTax Company Code, navigate in aACE from Main Menu > Internal > Offices, then locate the desired office record. In the Setup tab, enter the AvaTax Company Code in the Tax Automation Code field:

The screenshot shows the 'Offices' management interface. The header indicates 'Record: 2 of 4' and 'Offices'. The main title is 'Office: aACME Education Solutions, Inc. (AI)' with an 'ACTIVE' status indicator. Below the title are tabs for 'Office Details' and 'Setup'. The 'Setup' tab is active, showing three main sections: 'Company', 'Tax Details', and 'Additional Info'. The 'Company' section has a text field for 'Company >' containing 'aACME Education Solutions, Inc.'. The 'Tax Details' section contains three fields: 'Tax ID' (5555555), 'Entity #' (1), and 'Tax Automation Code' (which is circled in red). The 'Additional Info' section is currently empty. Below these sections is the 'Office Personalization' area, which includes a 'Report Header' section with a logo and contact information for 'aACME Education Solutions' (1238 Broadway, New York, NY 10001 (555) 418-9777). A checkbox labeled 'Use default Report Header' is present and unchecked. To the right of the logo, there are technical specifications: 'Dimensions: 585px wide by 125px tall' and 'File Format: JPEG or PNG, RGB colorspace'.

Note: To reduce expenses, if one of your business entities does *not* collect taxes, do not enter a Tax Automation Code for it.

### 4. Configuring Line Item Codes

You must enable AvaTax for each LIC that should have sales tax automatically calculated.

Navigate from Main Menu > Order Setup > Line Item Codes. In the Setup tab for each applicable LIC, under the Preferences section, mark the flag to Enable AvaTax:

**Code:** TB-LIT102 | **The Complete Works of Shakespeare** ACTIVE

**Accounting Setup**

Revenue Account >	Cost Account >
4030   Textbook Sales	5001   Uncategorized Cost
Inventory Account >	Department >
1307   Textbook Inventory	

**Commissions and Rate Setup** Excl from Commissions

Rate Type	Rate Value	VDS	Price
Markup %	25%	<input checked="" type="checkbox"/>	99.99
Commission Type	Comm Value	VCS	Commission
Not Applicable		<input type="checkbox"/>	

**Unit Info**

Proc Case Qty	UOM	UPC	HTS
Sale Case Qty	UOM	GTIN	ECCN

**Preferences** *These settings impact behavior throughout the system. Please consult the aACE knowledge base for additional info.*

**Sales Entry**

- Show in Code drop-down list for orders, quotes and invoices.
- Print by default.
- Enforce rate card billing.
- Exclude customer discount.
- Enable tax automation. Tax code:

**Shipping and Fulfillment**

- Enable outgoing shipments in Orders.
- Drop ship by default.
- Special order by default.
- Do not create a sub-assembly job.

**Time & Expenses**

- Show in Code drop-down list for expense envelopes.
- Non-Billable
- Paid Time Off (PTO)

**Auto-Updates**

- Disable updates for Product Description and Unit Cost.
- Update the Est Unit Cost to the greater of the weighted avg. of
  - A) current inventory or
  - B) purchasing activity within the last number of days:  (Leave empty to consider all purchasing activity.)

**Record Access**

- Accessible to all offices.
- Accessible to selected offices only.

**Oversight Notifications**


- Send notice when an order or PO is opened.
- Send notice if sold with margin less than:

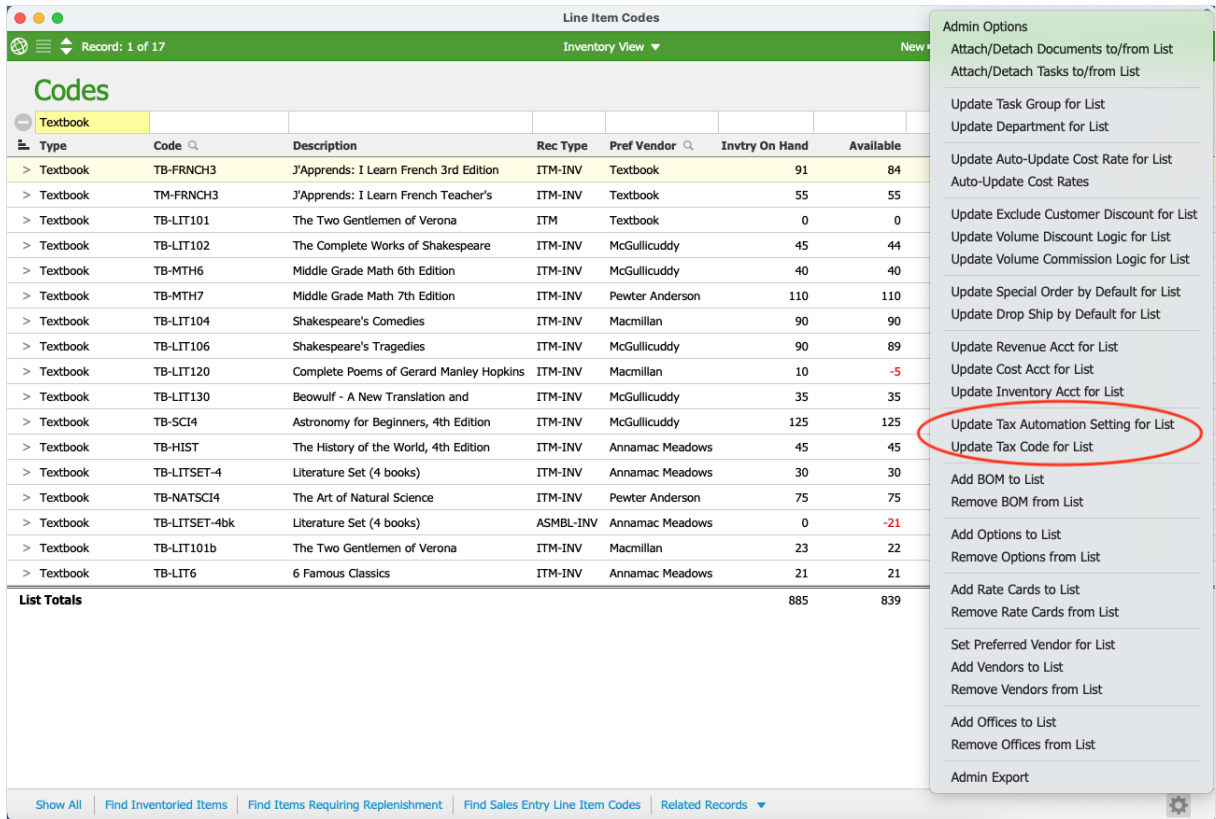
**Barcode Scanning**

Barcode input:

You can also set a tax code that AvaTax will use to calculate tax rates. (For details, contact your Avalara representative.)

System administrators can update the following settings for batches of LICs:

1. At the Line Item Codes module, use the Quick Search bar to locate all the LICs you need to update.
2. In the footer, click the **Admin Actions** icon (  ).



3. Click the link for the desired update:

- o Update *Tax Automation Setting* for Line Item Codes in List – This changes the Enable Tax Automation preference for *all* LICs currently listed. Click Y-True to mark this flag or click Y-False to clear this flag.
- o Update *Tax Code* for Line Item Codes in List – This leverages the [import process to update LICs](http://aace6.knowledgeowl.com/help/importing-updates-to-your-line-item-codes) (<http://aace6.knowledgeowl.com/help/importing-updates-to-your-line-item-codes>). You can prepare an Excel spreadsheet with specific tax codes you receive from your Avalara representative, then import that data to modify the current records.

Note: To reduce your expenses, if certain LICs do *not* require sales tax, do not enable the AvaTax preference for them.

### 5. Configuring Tax Profiles

aACE tax profiles can be set up in different ways depending on your business needs. Navigate from Main Menu > Accounting > Tax Profiles, then locate the desired tax profile.

Any record linked to a tax profile that has the **Enable for tax automation** flag marked will be processed through AvaTax. Make sure the tax profile is linked to an appropriate GL Account to receive the tax values that come back from AvaTax.

**Tax Profile: New York City (NYC)** ACTIVE

**Tax Profile Details**

**General Info**  
 Start Date: 01/01/20, End Date: 12/31/20

**Settings**  
 Default Tax Profile,  EU Tax Profile,  Use Tax Profile,  Enable for tax automation

**Description**  
 New York City tax profile effective 1/1/2020-12/31/2020

**Tax Setup**

Label	GL Account
Tax 1: NYS	2302   State Tax
Tax 2: NYC	2303   City Tax
Tax 3: Metro	2308   Metropolitan Commuter Transportation District
Tax 4:	

**Default Rates**

Line Item Type:	NYS	NYC	Metro
Item (Products)	4.0000%	4.5000%	0.3800%
Expense	4.0000%	4.5000%	0.3800%
Time (Service)	4.0000%	4.5000%	0.3800%
Other	0.0000%	0.0000%	0.0000%

**Exceptions**

Code	Description	NYS	NYC	Metro
> DEPOSIT	Deposit	0.0000%	0.0000%	0.0000%
> SHIP	Shipping	0.0000%	0.0000%	0.0000%

The simplest implementation is often to have a single, default tax profile with AvaTax enabled, but additional tax profiles can be useful:

- If you want the tax values calculated by AvaTax to be tracked in the general ledger (GL) using various criteria. For example, you may want a different GL Account for taxes for each state you do business in. This would require [setting up a tax profile](https://aace6.knowledgeowl.com/help/setting-up-tax-profiles) for each of these states.
- If you want the AvaTax tax calculation to be *disabled* for a certain group of companies, such as those in a certain jurisdiction for which your AvaTax account is not set up to calculate.