# Step-by-Step Guide to Configuration

The **ConnectIt Configuration** utility provides a way to check or change the various settings the **ConnectIt-Avalara** software uses when running the various QuoteWerks and Avalara AvaTax integration utilities.
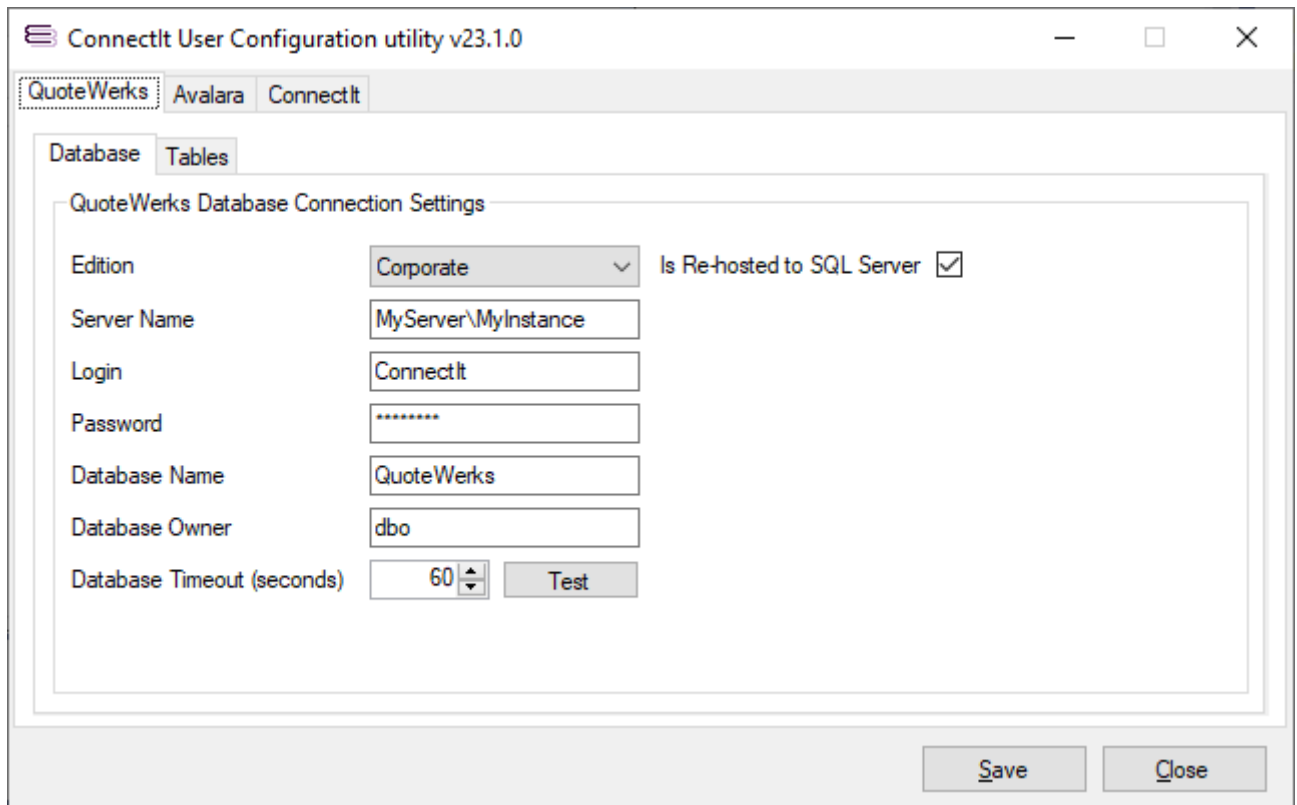
To open the **ConnectIt Configuration** application, browse to the Start | All Programs | ConnectIt-Avalara menu group and click the **ConnectIt Configuration** option.

NOTE: The field names entered in the various settings in the ConnectIt Configuration utility are based on the QuoteWerks database field names and not the customised field captions. To find the QuoteWerks database field name label, (the default label name), go into QuoteWerks, then while holding down the Ctrl key double left click on the field label in question.
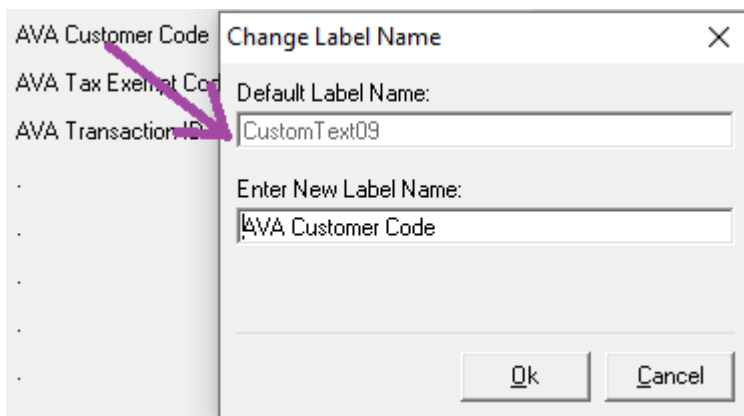
QuoteWerks Database Connection Settings

The **QuoteWerks tab -> Database tab** enables the connection to the QuoteWerks database to be set up and tested.

1. On the **QuoteWerks tab -> Database tab**, select the **Edition** of QuoteWerks that you are running (Standard, Professional or Corporate).

2. If running the QuoteWerks Corporate edition, the **Is Re-hosted to SQL Server** option box becomes enabled. If you are running the QuoteWerks Corporate edition which has been re-hosted, tick this option to allow the rest of the information to be populated.

3. If running QuoteWerks which has been re-hosted, enter the **Server Name**, **Logon**, **Password**, **Database Name** and **Database Owner** information. This can be found by looking in the QuoteWerks Help -> About screen -> System tab.

NOTE: The password value is not displayed for security reasons. You may need to ask your IT systems administrator, or the person who originally re-hosted QuoteWerks, for this information.
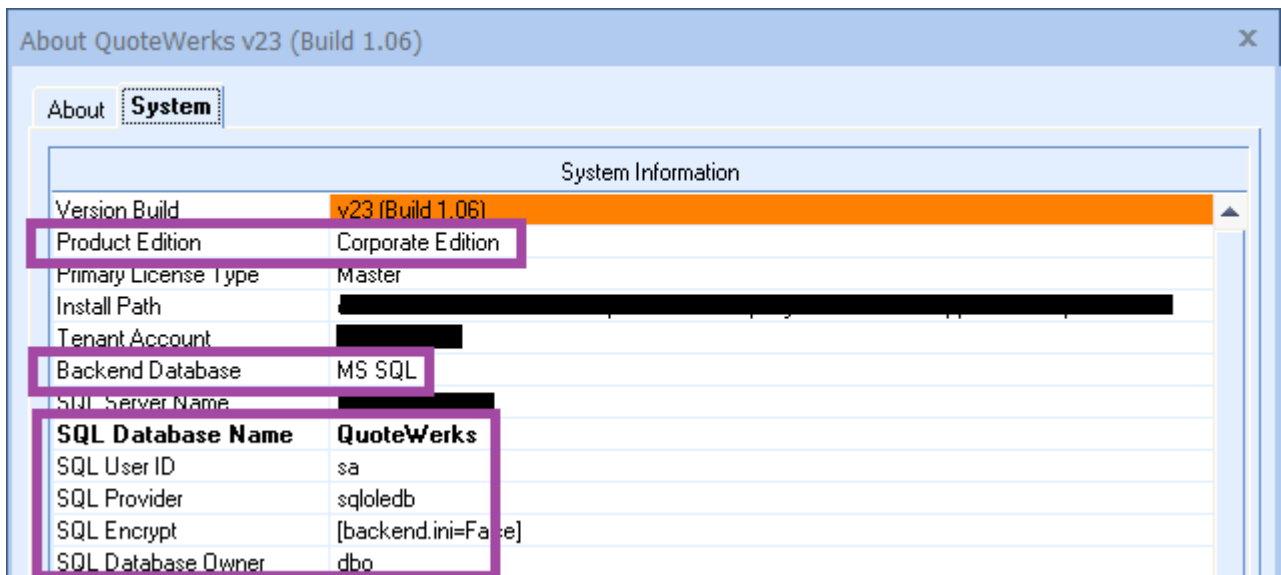
4. Click the **Test** button to check that the settings are correct.

NOTE: On successful configuration, you will receive the message "Logon Information Tested OK!". If you do not receive this message, please check the details and try again.

QuoteWerks Database Document Headers Table Settings

The **QuoteWerks tab -> Tables tab -> Document Headers tab** provides options to configure which fields contain the key information that will be used when the QuoteWerks and Avalara AvaTax integration utilities are run.

1. **Transaction Date Field** is the name of the field to read the date for the Avalara AvaTax tax calculation transaction. Typically this would be the Document Date (DocDate) field, but you may wish to use a different field if you back date or forward date Orders.

2. **ShipTo Address Fields** (select SoldTo, ShipTo or BillTo) are the QuoteWerks document address fields that contain the details of where the goods will be shipped. Typically this would be the ShipTo fields, but you may wish to change this if you use QuoteWerks address fields in a different way.

3. **Default Country Code** is the value that the 'Resolve Address', 'Get Tax Rate' and 'Get Tax Amount' processes should use if the specified Address Fields Country value is blank.

4. **Customer Code Field** is the name of the field where the Avalara AvaTax Customer Code is read from. If the Avalara AvaTax Customer Code is not available in QuoteWerks, then this can be blank or a default fixed value may be applied. When it is used, we recommend that it is a field value pulled through from the contact management software you have linked to QuoteWerks to ensure that it is entered correctly and consistently.

5. **Customer Name Field** is the name of the field where the Avalara AvaTax Customer Name is read from. (This option is only available if you are looking up the Customer Code from the Customer Name – see the Avalara Tax Calculation Configuration Settings section.)

6. **Customer Default Code** is the value that the ConnectIt 'Get Tax Amount' process should use in the absence of a Code read from the Customer Code Field setting or looked up using the Customer Name Field.

NOTE: the Avalara AvaTax calculation requires a Customer Code to be sent as part of the request, even if the Customer Code does not actually exist in your Avalara account. If a Customer Code is not sent, then the Avalara AvaTax calculation will return an error.

If you would like the Avalara AvaTax calculation to be performed irrespective of whether a Customer exists in your Avalara account (as you might when quoting to a new prospect) then a value should be entered for this setting. If you do not want the Avalara AvaTax calculation to be performed if the Customer does not exist in your Avalara account (as you might if you are using the integration to create transactions in Avalara) then this setting should be left blank.

7. **Tax Exempt No Field** is the name of the field where a tax exemption reference (or Entity/Use Code) would be entered onto the QuoteWerks document. If your business does not have customers with tax exempt statuses, then this field can be left blank.

NOTE: there is a utility on the Avalara API Connection Settings tab which allows you to download a list of the Entity/Use Codes available in your Avalara AvaTax account and copy them to the Windows clipboard. This list can then be imported into the F2 Lookup for the QuoteWerks field that you are using.

NOTE the ConnectIt-Avalara 'Get Tax Amount' process will automatically pick up a Customer's tax status when it does the calculation and so the Entity/Use Code value does not need to be entered here too if you have Customers set up in Avalara already.

8. **Tax Rate Field** is the name of the field where the QuoteWerks document tax rate is read from and written to as part of the Get Tax Rate process.

9. **Shipping Code**, **Description**, **Amount** and **Tax Code Field** are the names of the fields or fixed values to use for the tax calculation transaction line item if Shipping Costs have been specified on the QuoteWerks Document.

10. **AvaTax Summary Field** is the name of the field where a summary of the tax amount calculation by Avalara AvaTax is written to.

11. **AvaTax Comments Field** is the name of the field where any messages from the Avalara AvaTax calculation are written.

12. **Total Tax Field** is the name of the field where the tax amount calculated by Avalara AvaTax is written to.

13. **Transaction ID Field** is the name of the field where the Avalara AvaTax calculation transaction ID is written to. (This option is only available if you are saving the transaction – see the Avalara Tax Calculation Configuration Settings section.)

NOTE: all settings (apart from the ShipTo Address Fields selection) support the use of ConnectIt &QWDH_ macro prefixes. If using a &QWDH_ macro prefix, then the integration utility will read the value from the field in the suffix part of the setting. For example: in the above configuration settings, we're using the &QWDH_CustomText09 macro to tell ConnectIt to read the Customer Code Field from the QuoteWerks document Custom tab CustomText09 field.

If a setting is not relevant or available in your QuoteWerks setup (such as not having Customer Codes available or Tax Exempt customers) then these may be set with a default fixed value or left blank.

NOTE: the AvaTax Summary, AvaTax Comments, Total Tax and Transaction ID fields should always be macro value fields (or blank) as these are field references where the utility will write information back into QuoteWerks.

QuoteWerks Database Document Items Table Settings

The **QuoteWerks tab -> Tables tab -> Document Items tab** provides options to configure which fields contain the key information that will be used when the QuoteWerks and Avalara AvaTax integration utilities are run.

1. **Product Code Field** is the name of the field where the line item Product Code is read from. If you do not have Codes for the items that you sell, then this can be blank or a default fixed value may be applied.

2. **Description Field** is the name of the field where the line item description is read from.

3. **Tax Code Field** is the name of the field where the line item Avalara AvaTax Tax Code is read from. If you do not have or do not know the Avalara AvaTax Tax Codes for the items that you sell, then this can be blank or a default fixed value may be applied.

4. **Tax Code Mapping Field** is the name of the field where the value for the line item match to the ConnectIt QuoteWerks and Avalara AvaTax Tax Code mappings is read from. (See ConnectIt Tax Code Mappings section below.) If you are not using the Tax Code Mappings feature, then this can be left blank.)

5. **Charge Line Code** is the Product Code to use in the Avalara AvaTax calculation for Charge Line Types on the QuoteWerks document.

6. **Charge Tax Code** is the Avalara AvaTax Code to use in the Avalara AvaTax calculation for Charge Line Types on the QuoteWerks document.

7. **AvaTax Summary Field** is the name of the field where details of the Avalara AvaTax calculation are written to.

8. **Tax Field** is the name of the field where the tax amount calculated by Avalara AvaTax is written to.

NOTE: all settings support the use of ConnectIt &QWDH_ and &QWDI_ macro prefixes. If using a &QWDH_ or &QWDI_ macro prefix, then the integration utility will read the value from the field in the suffix part of the setting. For example: in the above configuration settings, we're using the &QWDI_ManufacturerPartNumber macro to tell ConnectIt to read the Product Code from the QuoteWerks document Document Items tab ManufacturerPartNumber field.

If a setting is not relevant or available in your QuoteWerks setup (such as not having Product Codes available or not using Charge Line Types) then these may be set with a default fixed value or left blank.

For more information on Avalara AvaTax Tax Codes, see the Avalara website here.

Avalara API Connection Settings

The **Avalara tab -> API tab** enables the connection to your Avalara AvaTax account to be set up and tested.

1.   On the Avalara tab -> API tab, select whether you would like to connect to your **Production** or **Sandbox** environment.

2.   Enter the **Username** and **Password** that you use to log into your Avalara AvaTax account web portal.

3.   Click the **Test** button to make sure that the details are correct.

NOTE: On successful configuration, you will receive the message "Logon Information Tested OK!" and the Ping, Get Company Codes, Get Company ID, Get Customer Codes and Get Entity/Use Codes buttons will be enabled. If you do not receive this message, please check the details and try again.

4.   Click the **Ping** button to view details of the connection and account you are connecting to and make sure that the details are correct.

ConnectIt User Configuration

Ping Result: '{
 "version": "23.2.1",
 "authenticated": true,
 "authenticationType": 1,
 "authenticatedUserName": ███████,
 "authenticatedUserId": █████,
 "authenticatedAccountId": █████████,
 "authenticatedCompanyId": null,
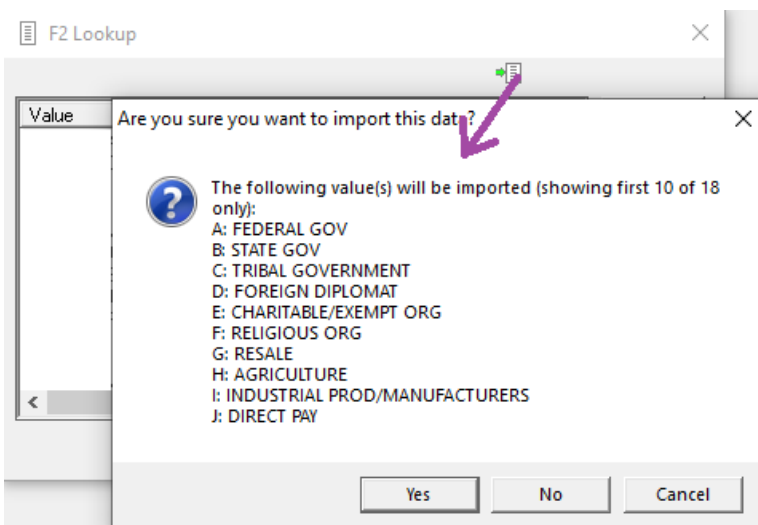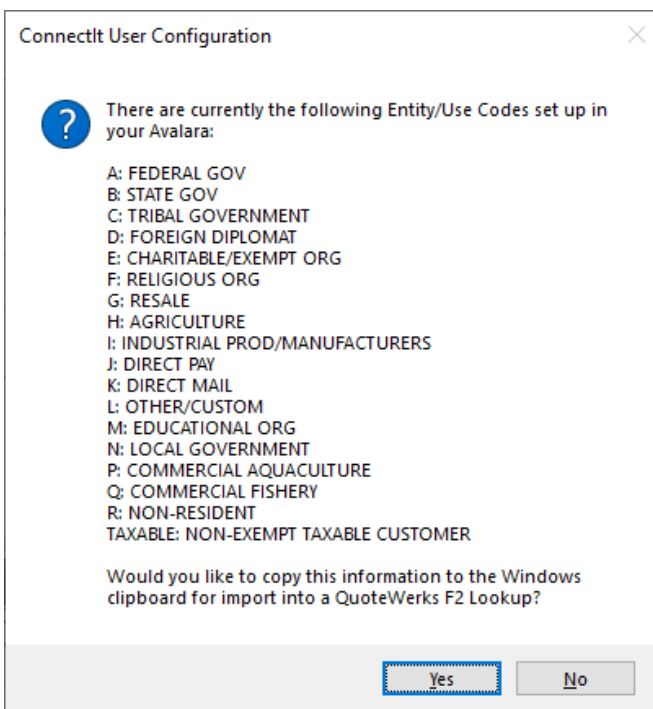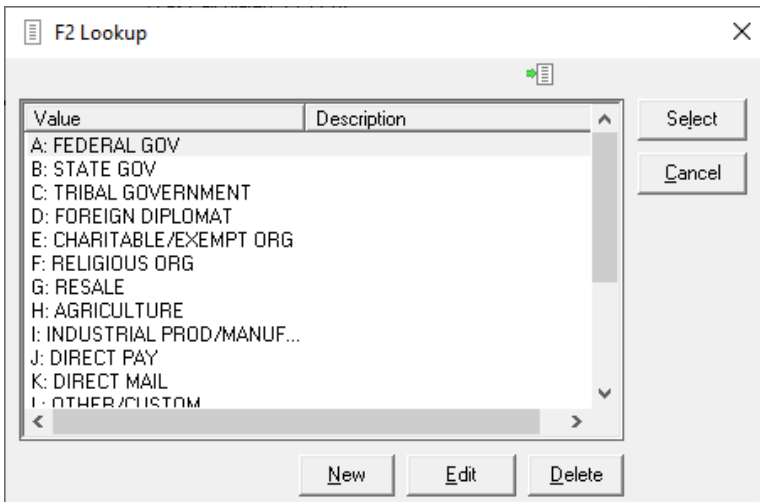 "crmid": ████████
}'

OK
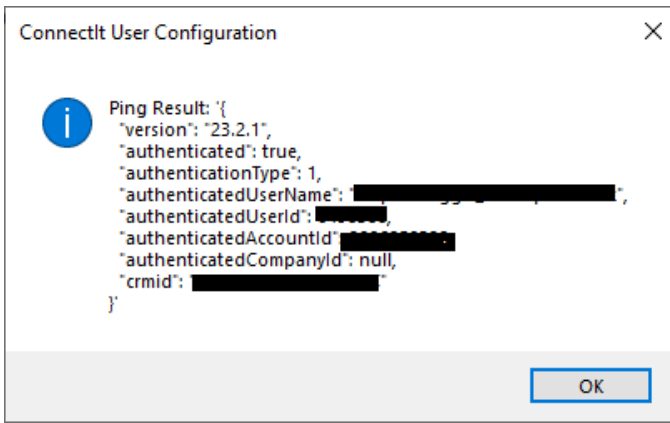
5. Click the **Get Entity/Use Codes** button to view a list of the Entity/Use Codes available in your Avalara AvaTax account. The message box offers the option to copy the list to the Windows clipboard which can then be imported into the F2 Lookup for the QuoteWerks field that you are using.

ConnectIt User Configuration

There are currently the following Entity/Use Codes set up in your Avalara:

A: FEDERAL GOV
B: STATE GOV
C: TRIBAL GOVERNMENT
D: FOREIGN DIPLOMAT
E: CHARITABLE/EXEMPT ORG
F: RELIGIOUS ORG
G: RESALE
H: AGRICULTURE
I: INDUSTRIAL PROD/MANUFACTURERS
J: DIRECT PAY
K: DIRECT MAIL
L: OTHER/CUSTOM
M: EDUCATIONAL ORG
N: LOCAL GOVERNMENT
P: COMMERCIAL AQUACULTURE
Q: COMMERCIAL FISHERY
R: NON-RESIDENT
TAXABLE: NON-EXEMPT TAXABLE CUSTOMER

Would you like to copy this information to the Windows clipboard for import into a QuoteWerks F2 Lookup?

Yes   No

F2 Lookup

Value

Are you sure you want to import this data?

The following value(s) will be imported (showing first 10 of 18 only):
A: FEDERAL GOV
B: STATE GOV
C: TRIBAL GOVERNMENT
D: FOREIGN DIPLOMAT
E: CHARITABLE/EXEMPT ORG
F: RELIGIOUS ORG
G: RESALE
H: AGRICULTURE
I: INDUSTRIAL PROD/MANUFACTURERS
J: DIRECT PAY

Yes   No   Cancel

6. Enter the Company Code or QuoteWerks &QWDH_ field macro where you are storing the Code for the Company where you would like the Avalara AvaTax transaction to be calculated.

7. Click the **Get Company Codes** button to view a list of the Companies and their respective Codes available in your Avalara AvaTax account. This is useful to double-check that the Company Code entered into the Configuration is available in your Avalara AvaTax account under the specified user credentials. And/or if you are using a QuoteWerks document field to store the Avalara AvaTax Company Code, then the message box offers the option to copy the list to the Windows clipboard which can then be imported into the F2 Lookup for the QuoteWerks field that you are using in the same way that Entity/Use Codes are (see above).

8. Click the **Get Company ID** button to retrieve the Avalara internal database Company ID value from your Avalara account

9. Click the **Get Customer Codes** button to view a list of the Companies and their respective Codes available in your Avalara AvaTax account. If you are using a QuoteWerks document field to store the Avalara AvaTax Customer Code, then the message box offers the option to copy the list to the Windows clipboard which can then be imported into the F2 Lookup for the QuoteWerks field that you are using in the same way that Entity/Use Codes are (see above).
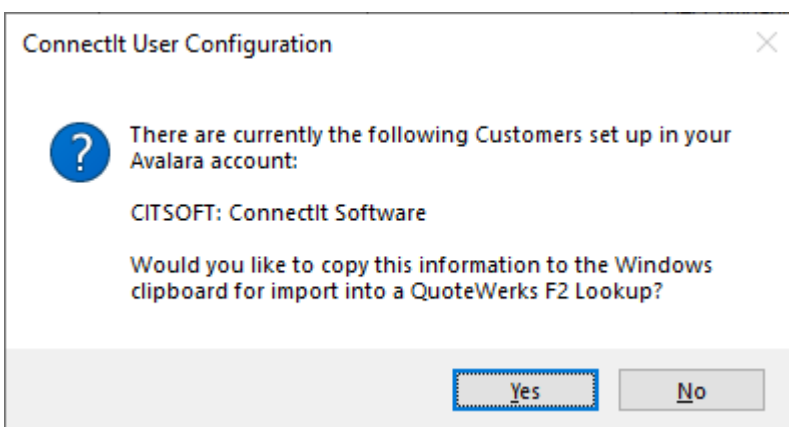
Avalara Address & Tax Calculation Configuration Settings

The **Avalara tab -> Configuration tab** provides options to configure some of the settings that will be used when the QuoteWerks and Avalara AvaTax integration utilities are run.

1. If **Disable Address Validation** is ticked, then the QuoteWerks User will not be allowed to use the **Resolve Address** feature of the integration. This can be useful when investigating an issue with QuoteWerks and the integration.

2. **Disable for Countries** is entered as a pipe-separated list of countries, for example "United Kingdom | Northern Ireland | France | Germany". When attempting to run the Address verification process, if the ShipTo country specified on the QuoteWerks document matches one of those in the Disable list, then the User will be not be allowed to run the process.

3. If **Disable Tax Calculation** is ticked, then the QuoteWerks User will not be allowed to use the **Get Tax Rate** or **Get Tax Amount** features of the integration. This can be useful when investigating an issue with QuoteWerks and the integration.

4. **Get Tax Rate By** (select Full Address or Postal Code) sets which parameters the integration uses when looking up the Tax Rate in your Avalara AvaTax account.

5. **Default Tax Code** is the value that will be sent to the Avalara AvaTax Tax calculation in the absence of any other value being found, either from the QuoteWerks Database Document Items Table Tax Code

field or Tax Code Mapping field. If you would prefer to let the Avalara AvaTax Tax calculation use its own default, then this field can be left blank.

NOTE: For more information on Avalara AvaTax Tax Codes, see the Avalara website here.

6. If **Customer Code from Name** is ticked, then in the absence of a value being read from the Customer Code Field, the ConnectIt-Avalara 'Get Tax Amount' process will attempt to lookup the Avalara Customer Code based on the Customer Name. (See QuoteWerks Database Document Headers Table Settings section.)

7. If one of the **Save Transaction in Avalara for QUOTEs**, **ORDERs** or **INVOICEs** is ticked, then the QuoteWerks document information will be sent as a Sales Invoice to the Avalara AvaTax Tax calculation so retaining the information in your Avalara AvaTax account online portal. Without one of the **Save Transaction in Avalara…** options ticked, the information is sent as a Sales Order and so it is not retained by Avalara.

8. If **Save Committed** is ticked, then the Transaction created in your Avalara AvaTax account will be sent with a Status of Committed. Without the **Save Committed** option ticked, then the Status will be Uncommitted.

NOTE: Typically we would only expect one (or none) of the Save Transaction in Avalara… options to be ticked. Having more than one of these options ticked could result in duplicate information being sent to your Avalara account.

ConnectIt Tax Code Mappings Settings

The **ConnectIt tab -> Tax Code Mappings tab** provides functions to set up how Tax Codes should be assigned to Line Items in the Avalara AvaTax calculation if a line-specific Tax Code has not been entered onto the QuoteWerks document.

NOTE: for more information on how ConnectIt-Avalara uses and prioritises the various Tax Code options within the Configuration, please see the Step-by-Step Guide to Integration.
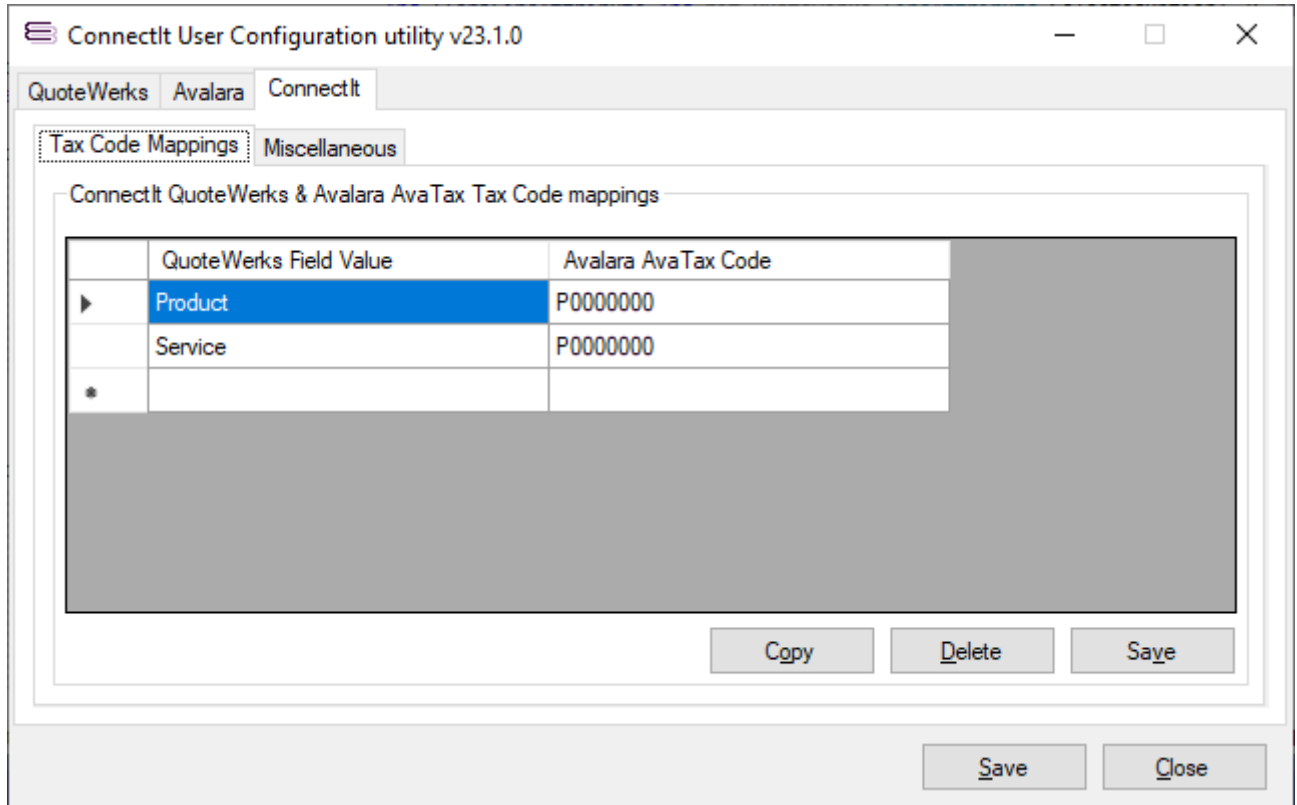

1. The **QuoteWerks Field Value** is the value that has been entered into the **Document Items Tax Code Mapping** field on the QuoteWerks Document Line Item (see **QuoteWerks Database Document Items Table Settings** section above).

2. The **Avalara AvaTax Code** is the Tax Code to be used for the associated **Field Value**.

3. The **Copy** button copies the contents of the grid to the Windows clipboard for pasting into another application (such as Excel) for analysis.

4. The **Delete** button removes the currently selected row from the grid.

5. The **Save** button writes the settings to the configuration file.

ConnectIt Miscellaneous Settings

The **ConnectIt tab -> Miscellaneous tab** provides options to save out QuoteWerks and Avalara AvaTax integration process communications and suppress the warning messages that the **ConnectIt** application generates when processing information from the QuoteWerks document.

Please note that suppressing warning messages is not recommended and may lead to the user missing important feedback when sending information between QuoteWerks and Avalara AvaTax.
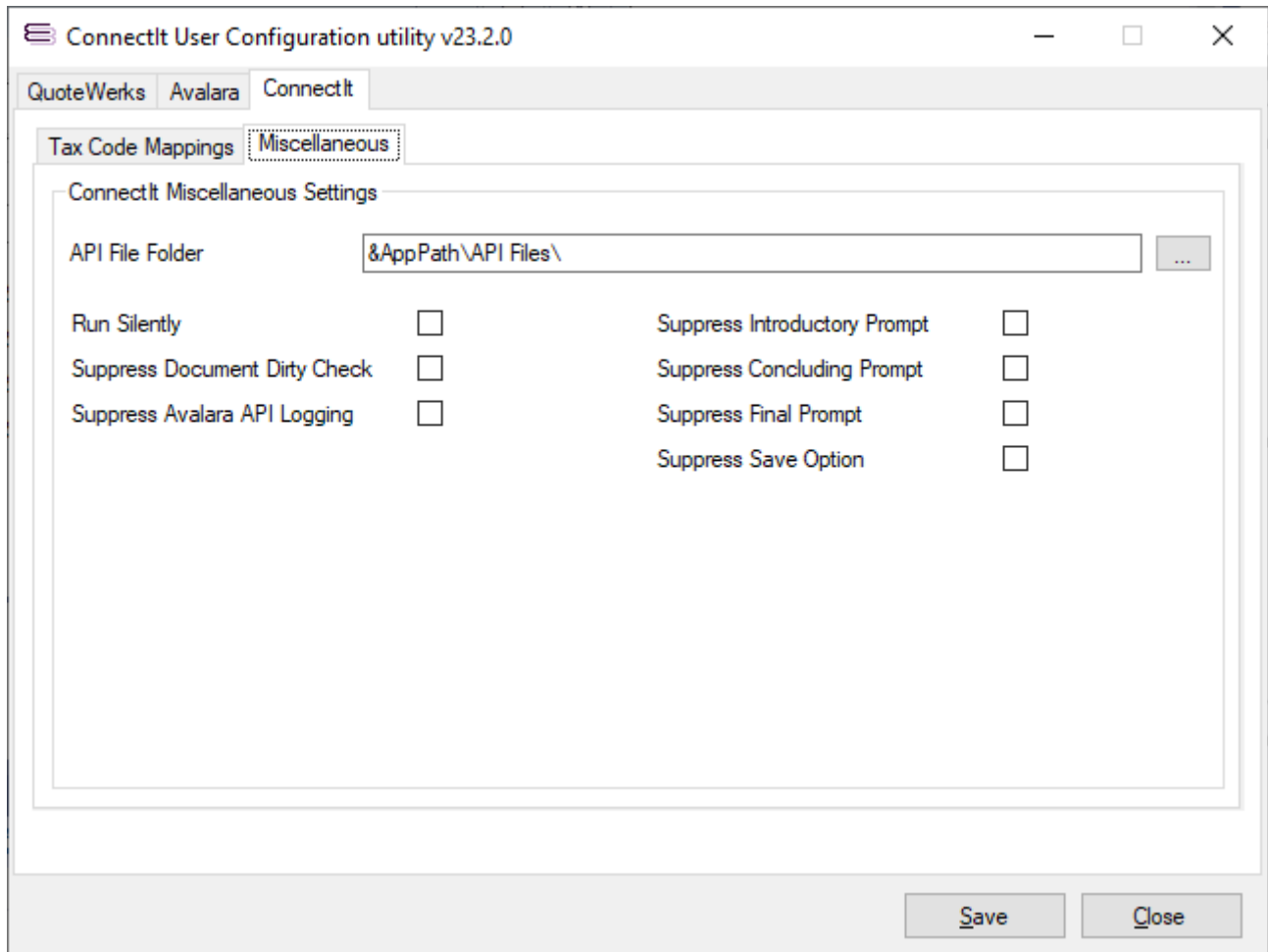
1. **API File Folder** is the path to a folder where the integration processes will save out files containing details of the QuoteWerks and Avalara AvaTax communications. These files may be useful to support when querying Avalara AvaTax Tax calculations.

NOTE: this supports the use of the &AppPath macro which is a reference to the folder where ConnectIt was installed.

2. Ticking **Run Silent** means that **ConnectIt** will run without prompting the QuoteWerks User of any interaction with the Avalara AvaTax web services; even if they fail to execute correctly.

NOTE: the Run Silent function overrides setting any of the "Suppress…" options.

3. Ticking **Suppress Document Dirty Check** means that the User will not be prompted if the document is unsaved or has changed since it was last saved.

4. Ticking **Suppress Avalara API Logging** means that **ConnectIt-Avalara** will not save copies of the request and response API files that it sends / receives when communicating with the Avalara AvaTax API. This can be useful to prevent the **API File Folder** from using disk space – the files are only very small, but can mount up over time.

5. Ticking **Suppress Introductory Prompt** means that the User will not be prompted with a "you are about to…", "would you like to continue" type message.

6. Ticking **Suppress Concluding Prompt** means that the User will not be prompted with a "these details have been updated" type message.

7. Ticking **Suppress Final Prompt** means that the User will not be prompted with a "the process completed ok" type message.

8. Ticking **Suppress Save Option** means that the User will not be asked if they would like to save the changes when they have been made to a document by the **ConnectIt-Avalara** process that has just been run.