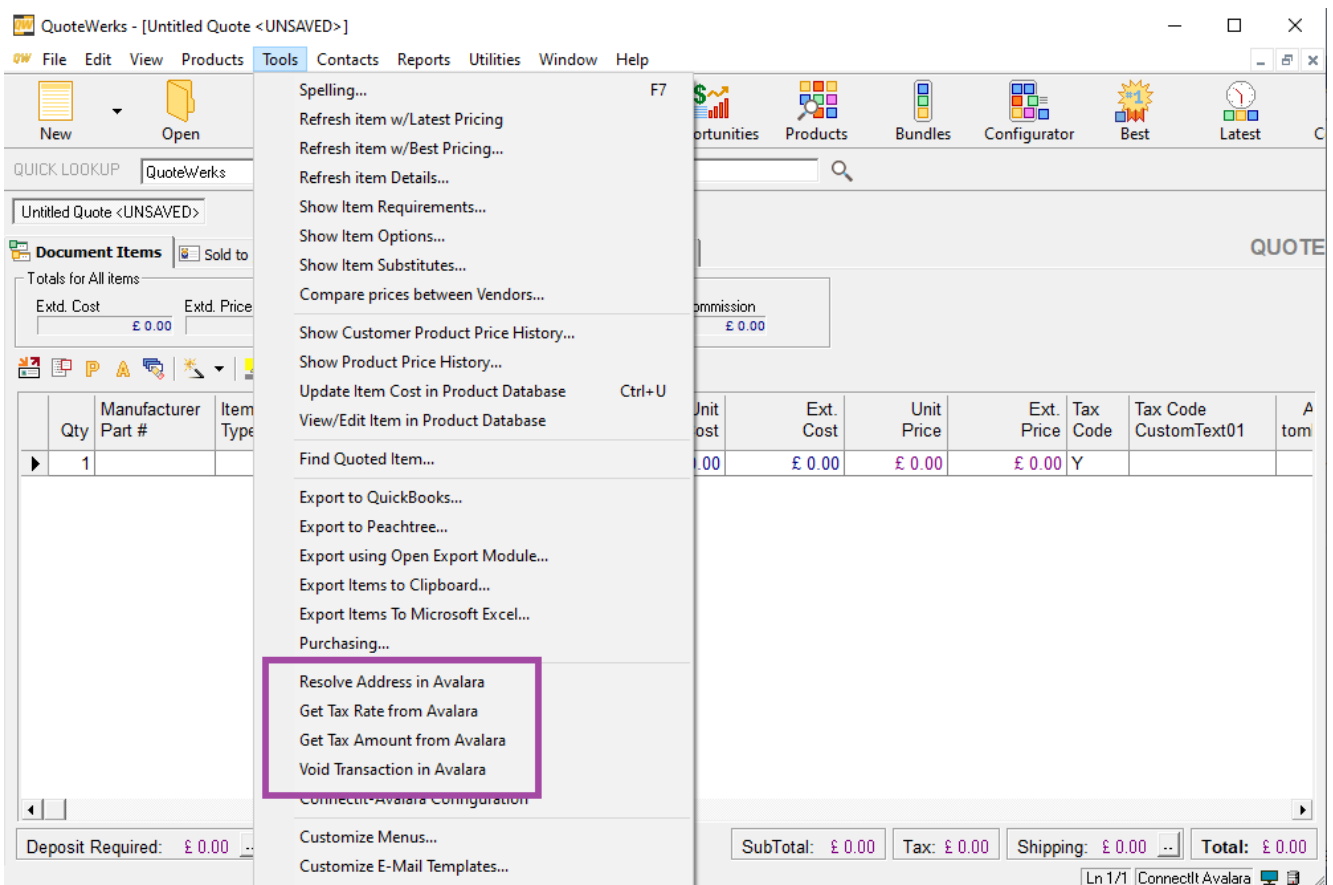


Step-by-Step Guide to Avalara Integrations

The **ConnectIt-Avalara** utility provides various utilities for QuoteWerks to ‘talk’ to Avalara AvaTax’s web services to check and update details on the current QuoteWerks document to ensure that they are accurate. These utilities may be run by clicking the appropriate custom option on the QuoteWerks Tools menu.



The screenshot shows the QuoteWerks application window with the 'Tools' menu open. The menu items are as follows:

- Spelling... F7
- Refresh item w/Latest Pricing
- Refresh item w/Best Pricing...
- Refresh item Details...
- Show Item Requirements...
- Show Item Options...
- Show Item Substitutes...
- Compare prices between Vendors...
- Show Customer Product Price History...
- Show Product Price History...
- Update Item Cost in Product Database Ctrl+U
- View/Edit Item in Product Database
- Find Quoted Item...
- Export to QuickBooks...
- Export to Peachtree...
- Export using Open Export Module...
- Export Items to Clipboard...
- Export Items To Microsoft Excel...
- Purchasing...
- Resolve Address in Avalara**
- Get Tax Rate from Avalara**
- Get Tax Amount from Avalara**
- Void Transaction in Avalara**
- ConnectIt-Avalara Configuration
- Customize Menus...
- Customize E-Mail Templates...

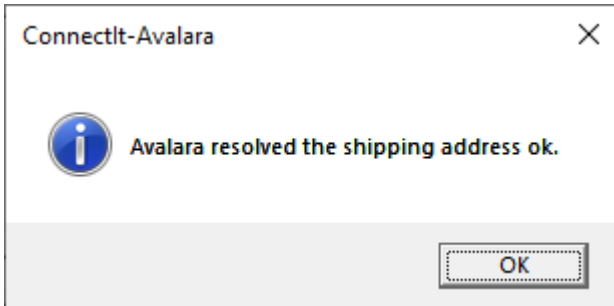
The background shows a quote document with a table of items. The table has columns: Qty, Manufacturer Part #, Item Type, Unit Cost, Ext. Cost, Unit Price, Ext. Price, Tax Code, Tax Code CustomText01, and Amount. The first row shows Qty: 1, Manufacturer Part #: [blank], Item Type: [blank], Unit Cost: £ 0.00, Ext. Cost: £ 0.00, Unit Price: £ 0.00, Ext. Price: £ 0.00, Tax Code: Y, Tax Code CustomText01: [blank], and Amount: [blank].

At the bottom of the window, there are summary fields: SubTotal: £ 0.00, Tax: £ 0.00, Shipping: £ 0.00, and Total: £ 0.00. The status bar at the bottom right indicates 'Ln 1/1 | ConnectIt Avalara'.

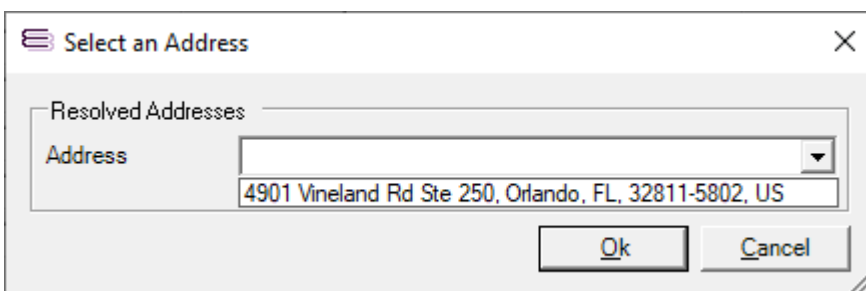
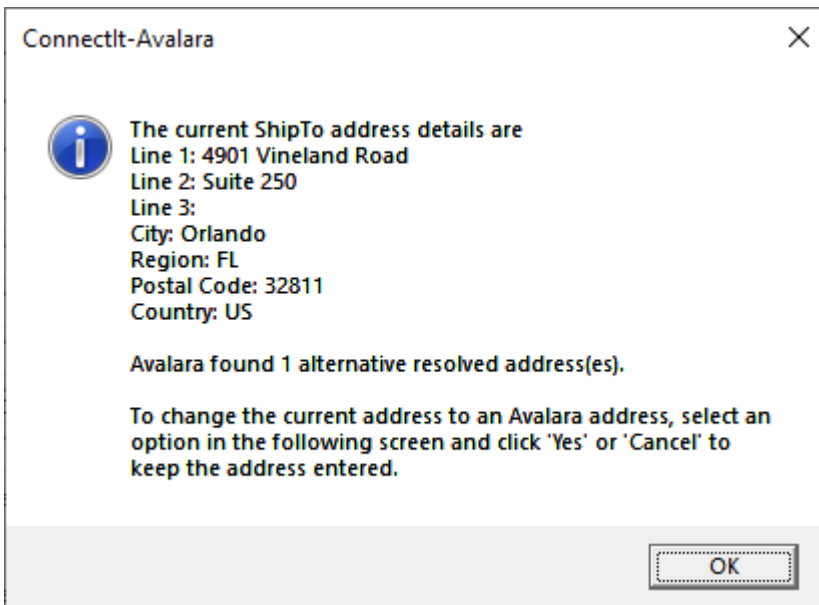


Resolve Address in Avalara

The Resolve Address utility will read the ShipTo address details from the current QuoteWerks document and check it against Avalara AvaTax's database. If the addresses match, then this is confirmed with the User.

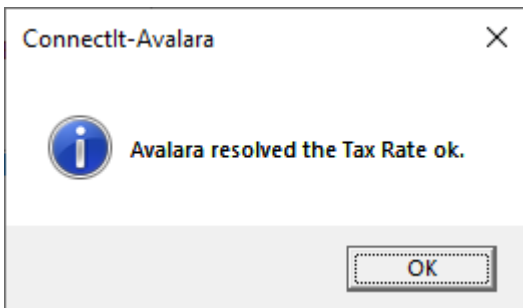


If the addresses do not match, then the User will be offered the option to update the QuoteWerks document address with the details from Avalara.

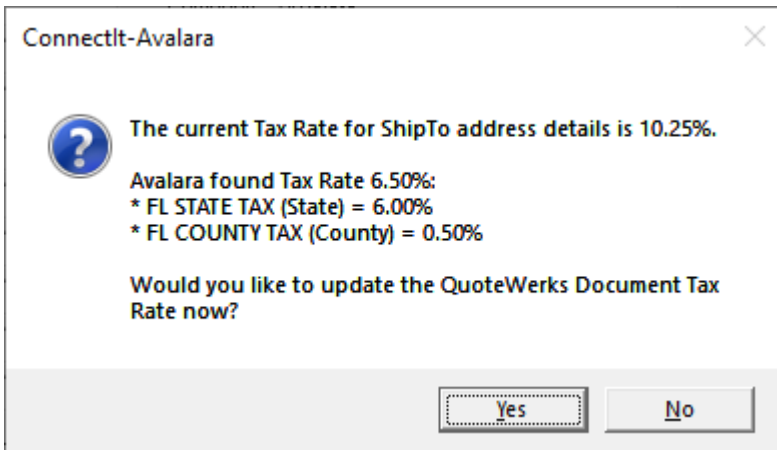


Get Tax Rate from Avalara

The Get Tax Rate utility will read the ShipTo address details and Tax Rate set from the current QuoteWerks document and check them against Avalara AvaTax's database. If the Tax Rate matches, then this is confirmed with the User.



If the Tax Rate does not match, then the User will be offered the option to update the QuoteWerks document Tax Rate with the rate from Avalara.



Get Tax Amount from Avalara

The Get Tax Amount utility will read the ShipTo address and Line Item details from the current QuoteWerks document and send them to Avalara AvaTax's taxation calculation engine. On successful completion, the utility will write the top line total tax amount calculated, a summary of how the total tax amount was calculated plus any message to fields in the current document's header field; it will also write the individual line item tax amount calculated along with details of the calculation for that line item to the document item fields.

Example summary of how the total tax amount was calculated:



Example of the line item calculation details:

AvaTax Tax tomNumber01	AvaTax Summary CustomText02
86.31	Tax Code: PB0010516; Taxable Amount: £1,327.82; Tax Calculated: £86.31
23.38	Tax Code: PB0010203; Taxable Amount: £359.67; Tax Calculated: £23.38
22.48	Tax Code: PB0010106; Taxable Amount: £345.87; Tax Calculated: £22.48
10.88	Tax Code: PB0010204; Taxable Amount: £167.27; Tax Calculated: £10.88

The **ConnectIt-Avalara Configuration** offers several settings for retrieving a Customer Code. The prioritisation of these options in how they are applied when the details are sent to the Avalara AvaTax calculation are as follows:

1. The value read from the Document Headers Customer Code field (See **ConnectIt Configuration -> QuoteWerks tab -> Tables tab -> Document Headers tab.**)
2. If the **ConnectIt Configuration -> Avalara tab -> Configuration tab -> Tax Calculation Configuration Settings section -> Customer Code from Name** option is ticked, then the value read from the Document Headers Customer Name field is used to match it to a Customer in Avalara (See **ConnectIt Configuration -> QuoteWerks tab -> Tables tab -> Document Headers tab.**)

NOTE: the match on the Customer Name is a complete, full text match on the entire field value.

3. The value read from the Document Headers Customer Default Code setting.

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.

Furthermore, with a valid Customer Code entered, if you have Avalara ECM (formerly CertCapture) then the calculation will factor any tax exemption certificates linked to the Customer into the tax calculation.



The **ConnectIt-Avalara Configuration** offers several settings for applying Tax Codes to Line Items. The prioritisation of these options in how they are applied to the QuoteWerks Document Line Items when they are sent to the Avalara AvaTax calculation are as follows:

1. If the Product Code from the QuoteWerks Document Line Item matches an Item Code in your Avalara AvaTax database, then the Tax Code assigned in Avalara is used. (See **ConnectIt Configuration -> QuoteWerks tab -> Tables tab -> Document Items tab**.)
2. The value read from the Document Items Tax Code field. (See **ConnectIt Configuration -> QuoteWerks tab -> Tables tab -> Document Items tab**.)
3. The value found by using the ConnectIt Tax Code Mappings – matching the value read from the Document Items Tax Code Mapping field on the QuoteWerks Document to one of the settings in the ConnectIt Tax Code Mappings. (See **ConnectIt Configuration -> QuoteWerks tab -> Tables tab -> Document Items tab** and **ConnectIt Configuration -> ConnectIt tab -> Tax Code Mappings tab**.)
4. The value set in the **ConnectIt Configuration -> Avalara tab -> Configuration tab -> Default Tax Code setting**.
5. In the absence of a Tax Code being found from the above, then Avalara will apply its own default value to the Line Item.



Void Transaction in Avalara

The Void Transaction utility will change the Status of the Transaction created during the Get Tax Amount process from the current QuoteWerks document to Voided. If the Transaction is successfully voided, then this is confirmed with the User.

