

# Avalara AvaTax for EPMS

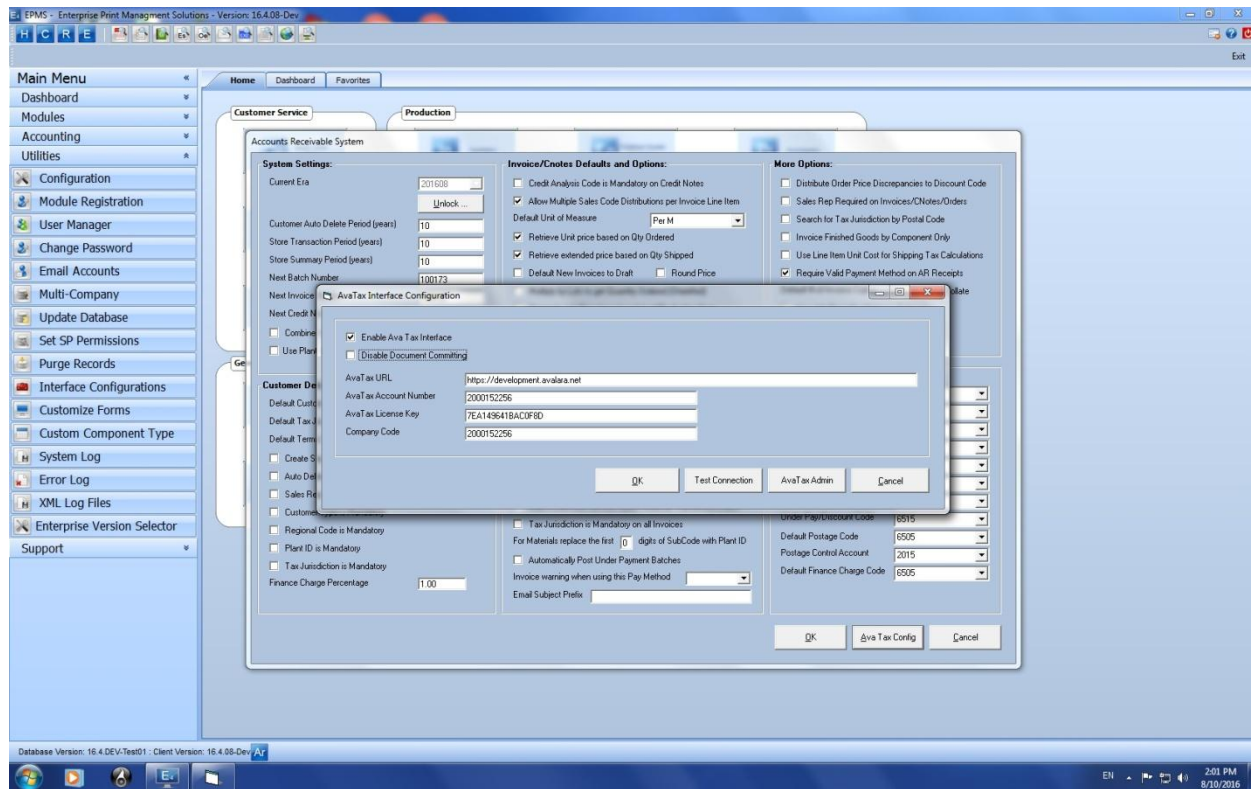
## Configuration/User Guide

Avalara AvaTax is a cloud based solution automating transaction tax calculations and the tax filing process. Avalara provides real-time tax calculation using tax content from more than 12,000 US taxing jurisdictions and over 200 countries, insuring your transaction tax is calculated based on the most current tax rules.

## Connect to AvaTax

After installing the AvaTax integration you will need to configure the integration. See screen below for example:

1. Go to Accounts Receivable > System screen.
2. Click the AvaTax Config button from the Accounts Receivable System screen.
3. Enter your AvaTax Credentials:
  - AvaTax URL: URL to connect to the Development or Production AvaTax services
  - Account Number: Provided during your AvaTax account activation process.
  - AvaTax License Key: Provided during your AvaTax account activation process.
  - CompanyCode: Company profile identifier in the AvaTax Admin Console.
  - Enable AvaTax: Check this checkbox to turn on the tax calculations.
  - Disable Document Committing: Only check this off if you don't want to use AvaTax for record keeping. Document Committing is on by default and will cause transactions to be posted and committed to the AvaTax Admin Console. With this turned off then AvaTax will only be used for Tax calculations but no record keeping.
4. Click the Test Connection button to verify that the connection to AvaTax is working.
5. You can click the AvaTax Admin button to launch your AvaTax Admin Console.



Above is a sample AvaTax configuration screen.

## Assigning Tax Exempt status to a Customer.

Simply go into Customer Maintenance either through Accounts Receivable or through Shop Standards and edit a Customer. Got to the Miscellaneous tab and fill out the Tax ID Number field. This will get sent to AvaTax for every transaction for that customer and will cause them to be treated as tax exempt.

## Assigning an AvaTax Product Tax Code to an Invoice line Item through the Tax Jurisdiction table:

This feature will allow you to assign different Avalara tax codes to line items on an invoice. It will also allow you to setup Freight/Handling and Postage Avalara codes.

Go to File Maintenance from the EPMS Main Menu. Go to File > Tax Jurisdictions. Edit the Tax Jurisdiction. You will see three fields.

1. AvaTax Code: Is for non Freight/Handling/Postage line items.
2. AvaTax Freight Code: Is for Freight and Handling line items.
3. AvaTax Postage Code: Is for Postage line items.

Make sure to fill out all three fields for each Tax Jurisdiction that you will use. Otherwise the system will defa