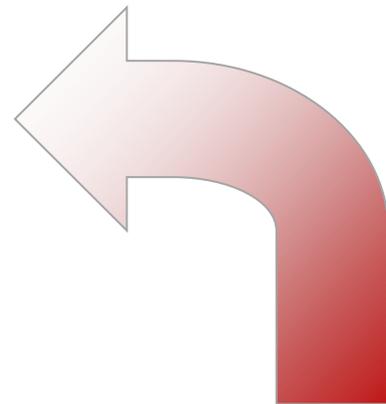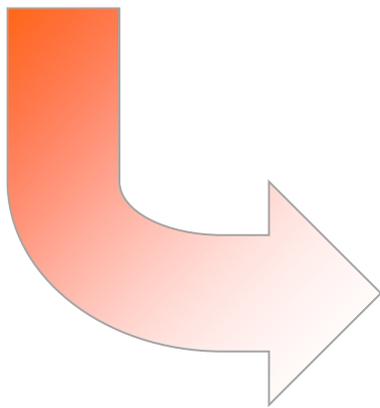# Faye Business Systems Group

Sugar – AvaTax Integration v1.x

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Compatibilities

This software is currently compatible with:

Avalara Avatax
Sugar v7.5.+

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Table of Contents

Overview

Sugar is the leading open source CRM software package in the world. Avalara AvaTax allows merchants to calculate tax, manage tax exemptions at the company, or item level, and includes tax calculations at a local, regional, and global level.

The FBSG **Sugar – Avatax Integration Application** allows you to accurately calculate taxes at a quote level from within Sugar CRM. Users are able to validate the billing and shipping addresses from within the quote. Sales tax can be calculated by clicking the "Calculate Tax" button and are always recalculated when saving a quote.

Key Benefits

- Ensure Sales tax calculation compliance with state, local, county entities
- Allows you to use your custom tax codes, and tax rules from Avalara
- One-click address validation from within a quotes

Configuration

Procedures – Configuration

** Note: You may have to log out and log back in order for the "Sugar – JIRA Integration Control Panel" to appear in the Admin screen (see below screen shot).

1. Navigate to the "Admin" screen, scroll to the bottom, and click on the *"Sugar – JIRA Integration Control Panel"*.

Procedures – Configuration (continued)

2. You will need to enter your *"Sugar-AvaTax License Key"*, *"AvaTax Account Number"*, *"AvaTax License"*. *"AvaTax Service URL"*, *"AvaTax Company Code"*, and then click *"Save"*
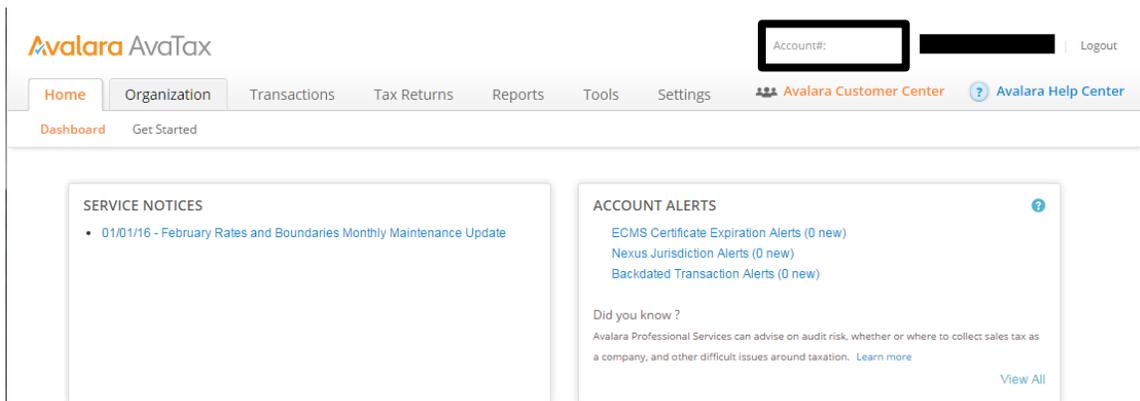

****Note: You must have the *"Enable AvaTax"* checkbox checked for the integration to work. Only uncheck this if you want or need to do testing on the Sugar Instance*

3. If you do not have your AvaTax information on hand you will need to retrieve it by going to the *"AvaTax Admin Console"* which can be done by clicking on the link in the *"Sugar – AvaTax Integration Setting"* page
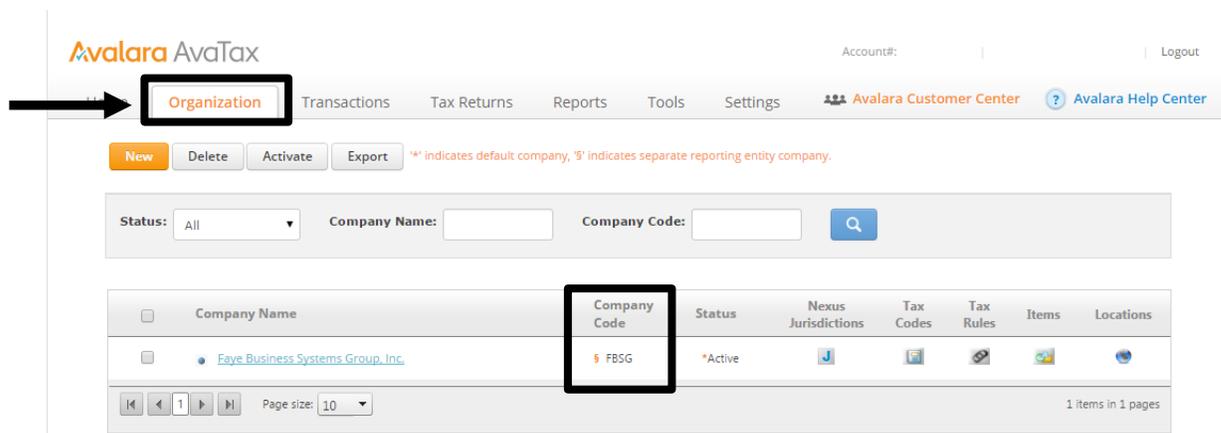

****Note: If you have your information you can skip to the Using the Integration section*

Procedures – Configuration (continued)

4. The "Sugar-AvaTax License Key" will be provided by FayeBSG upon purchase of the integration, as for the other values please follow the following steps to retrieve the information from AvaTax

5. The AvaTax account number is located in the upper right-hand corner near your user name
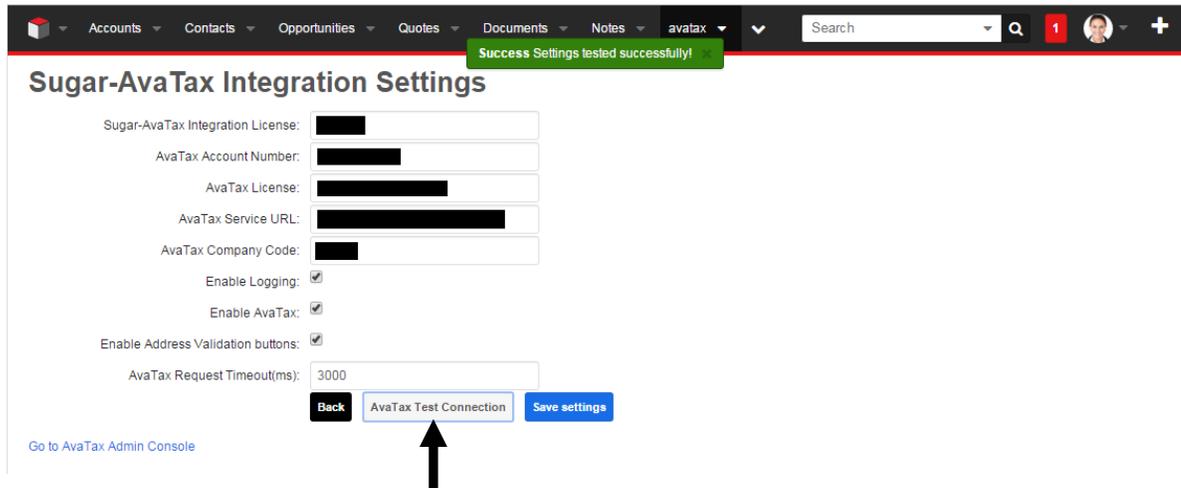

6. The AvaTax License will be provided to you by Avalara when you purchase a subscription to AvaTax

7. The AvaTax Service URL will be one of the following:
    *   Production/Live: https://avatax.avalara.net/
    *   Development/Sandbox: https://development.avalara.net

8. To retrieve the AvaTax company code click on the Organization tab and select the company code from the list view of companies

Procedures – Configuration (continued)

9. After entering all of these values click on the *"AvaTax Test Connection"* button to confirm that the settings are correct and valid

If the settings are correct you will receive a "Success" response, then click the "Save Settings" button

**Note: Please note that you will need to set up at least one Shipping Origin Address for the integration to work. This is covered in the next section: Using the Integration
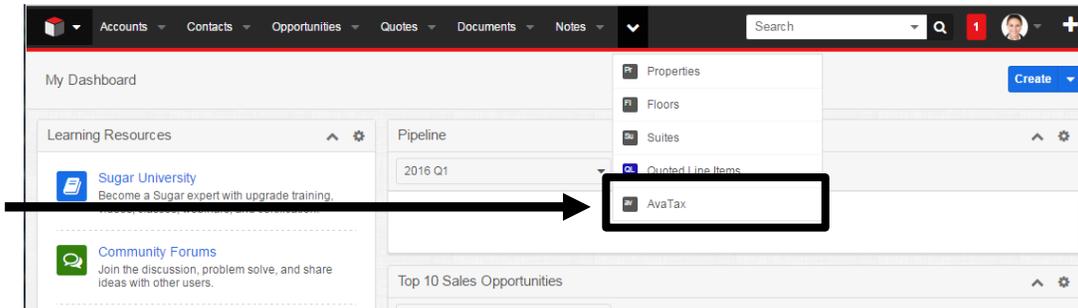
Using the Integration

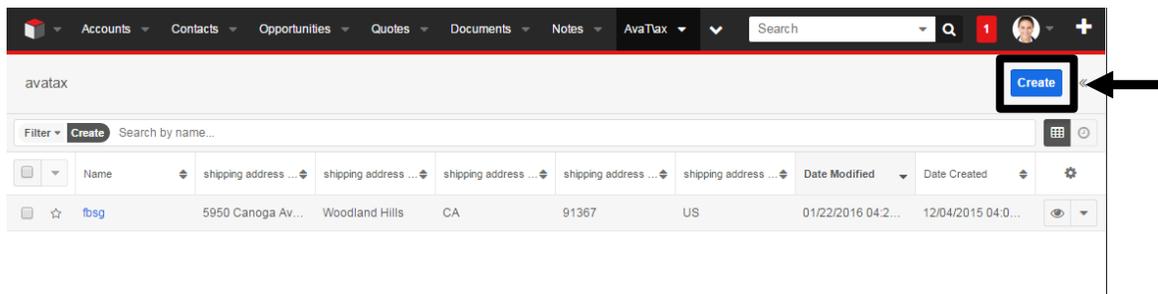<u>Using the Integration</u>

Adding a Shipping Origin Address

1. First you will need to set at least one *"Shipping Origin Address"* in the AvaTax module
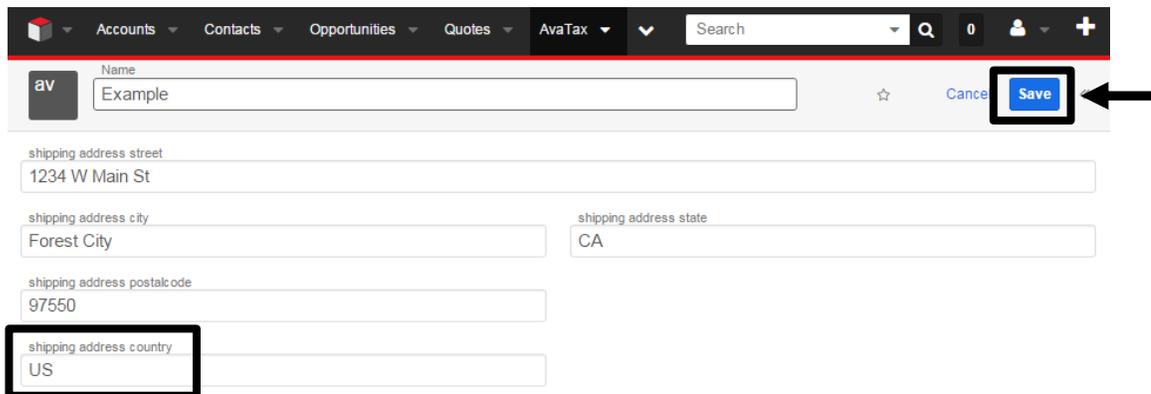

2. Once inside the AvaTax module click on the *Create* button to add a Shipping Origin Address

**Note: This address is used in part to calculate the tax value

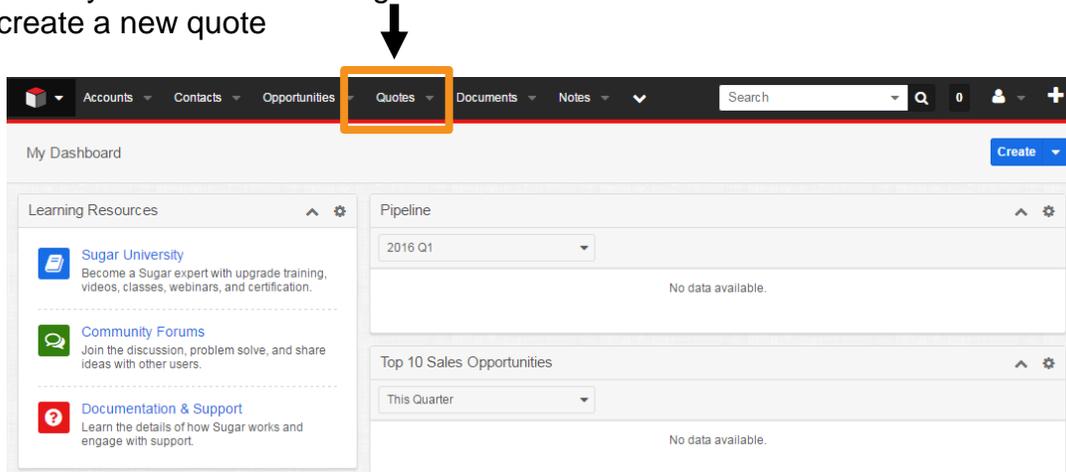3. Fill out all the fields and then click the *"Save"* button

*****NOTE:** *You have to use ISO 3166-1 Alpha 2 Country codes for all addresses*
<u>https://www.iso.org/obp/ui/#search/code</u> *(accessed 01/29/2016)*
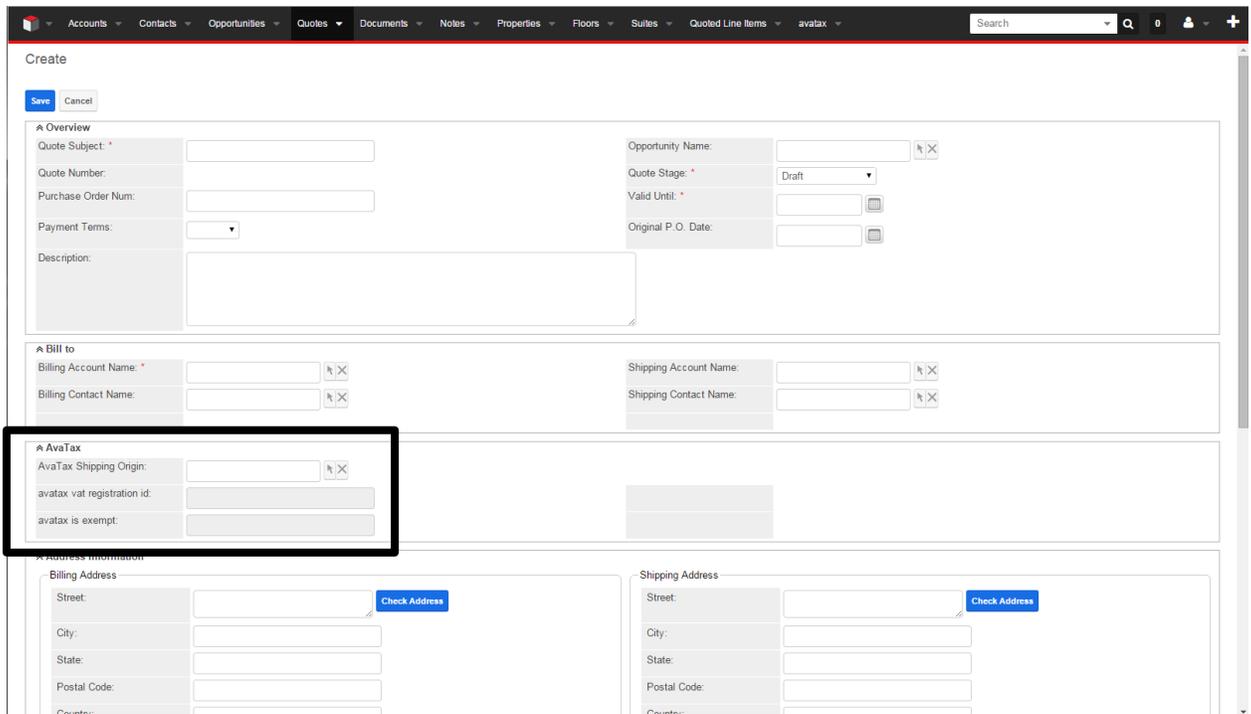***Note: You can create multiple Shipping Origin Addresses*

Using the Integration

Calculate Tax on a Sugar Quotes

1. First you will need to navigate to the Quotes module and either Edit and existing quote or create a new quote

2. You will notice that there is an additional section called *"AvaTax"* where you will need to select an origin address that was created in the Adding a Shipping Origin Address section

Using the Integration – Calculate Tax (continued)

3. You MUST select a AvaTax Shipping Origin address for the integration to work

4. The other two field will be calculated when the Quote is saved

Using the Integration – Calculate Tax (continued)

5. The Sugar – AvaTax Integration also incorporates an address validation feature that will validate either the billing or shipping address to ensure that the address actually exists. To do this click on the *"Check Address"* button next to either the billing or shipping address

If the address is not valid according to Avalara then you will receive and error

A valid email will get a success response

**NOTE: *You have to use ISO 3166-1 Alpha 2 Country codes for all addresses* https://www.iso.org/obp/ui/#search/code *(accessed 01/29/2016)*

Using the Integration – Calculate Tax (continued)

6. The tax is always calculated when the quote is saved. If you want to calculate the tax before the quote is saved then you can click on the *"Calculate Tax"* button in the *Grand Total* section

NOTE: There will be a charge for every calculate tax operation from AvaTax

7. The calculated tax will be based off the types of products, the destination address, origin address, AvaTax settings on the billing account, and any special rules or setting that are set in your AvaTax account.

<u>Using the Integration</u>

Setting Account specific AvaTax Settings

1. There are two AvaTax fields that are optional depending on the Account. These fields can affect the tax calculated and will need to be set accordingly.
These fields are *"AvaTax VAT Registration ID"* and *"AvaTax Exempt?"* these fields are located in the *AvaTax* section on the Account record.

2. The *"AvaTax VAT Registration ID"* should be provided to you by either the Company or Individual that the Sugar account is for. VAT stands for *"Value Added Tax"* and used Europe and other countries around the world. It is an alternative sales tax system and in general companies in countries that use VAT will have a Registration ID.
You can validate a European VAT Registration ID by visiting:
http://ec.europa.eu/taxation_customs/vies/vatRequest.html (accessed 01/29/2016)

Using the Integration – Account Settings (continued)

3. The *"AvaTax Exempt?"* field is used exclusively in the US and Canada. There are three options to select from with the default value being *"No"*. The other two options are *"Yes, use Customer Usage Type"* (preferred) and *"Yes, use Exemption Number"*

    The Customer Usage Type method will populate a dropdown with all of the possible options (e.g. *State Government (United States)*)
    Each possibility will have listed next to it the country it applies to, in some cases the same type will apply to both.

AvaTax

AvaTax VAT Registration ID
FR123400567892

AvaTax Exempt? (US/Canada)
Yes, use Customer Usage Type

AvaTax Customer Usage Type
State government (United States)   ✕ ▾

    *** Note*: The Customer Usage Type is the preferred method as it is the easiest way to explain a tax exemption during an audit*

    The Exemption Number method will populate a text box where you can enter in an Exemption Number. This number can be any number, but it recommended that the number be unique to each client

AvaTax

AvaTax VAT Registration ID
FR123400567892

AvaTax Exempt? (US/Canada)
Yes, use Exemption Number

AvaTax Exemption Number
5162738

    ***WARNING:** Using the Exemption Number method does not provide any information to explain an exemption during an audit. These values MUST be manually managed by the end user*

Technical Notes

Technical Notes

System requirements:

cURL enabled on web server
Sugar v7.5+ Professional, Enterprise or Ultimate Edition
Active Avalara AvaTax subscription