

## **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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### **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".

	alerts and actions					
Product and Quotes						
lanage the product catal	log, along with the related in	formation (	on manufacturers and	shipping pro	viders.	
Product Catalog	Enter items in the product ca	talog	Manufacturers	Set up	the list of manuf	acturers
Product Categories	Update the list of product cat	egories	Shipping Providers	Set up method	the list of availal Is	ble shipment
Product Types	Configure the list of product	ypes	% Tax Rates	Config for quo	ire the list of ava tes	ailable tax rat
laintain a list of releases reated within the Bug Tra	for your product. Active rele acker module.	ases are o	lisplayed in the Releas	ses drop-dow	n menus in bug	j records
and Releases	Manage releases and version	15		Time Deried	Farrante Dav	
Releases Forecast configure admin setting for Vorksheet Columns, and Forecasts	Manage releases and version or the Forecasts module. Th Scenarios.	e Forecas	ts Settings will include	Time Period	Forecasts Rar	nges,
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Releases Forecast Configure admin setting for Vorksheet Columns, and Forecasts Contracts Define contract types for types for selection. Contract Types Sugar - AvaTax Integritication of the second secon	Manage releases and version or the Forecasts module. Th Scenarios. Configure Forecasts Module the Contracts module. When Manage contract types ration	e Forecas	ts Settings will include ate a contract, the Typ	Time Period	Forecasts Rar	iges,





#### 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"

👕 – Accounts – Contacts – Oppor	ortunities - Quotes - avatax - V Search - Q 1 🔬 - +
Sugar-AvaTax Integra	ation Settings
Sugar-AvaTax Integration License:	
AvaTax Account Number:	
AvaTax License:	
AvaTax Service URL:	https://development.avalara.net
AvaTax Company Code:	
Enable Logging:	
Enable AvaTax:	
Enable Address Validation buttons:	
AvaTax Request Timeout(ms):	3000
	Back AvaTax Test Connection Save settings
Go to AvaTax Admin Console	

\*\*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

Avalara AvaTax	
Log in * User Name: * Password: Forgot password?	Exemption certificates: Are you at risk?         Make audits less painful and less expensive with Avalara CertCapture         In other words, leave your company with more, and auditors with less!
Log in New Users: Retrieve your user name and password from your email account or contact your organization's administrator for further instructions.	Avalara's Alesia Pinney Honored with 2016 Outstanding Chief Legal Officer Award

\*\*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: <u>https://avatax.avalara.net/</u>
  - Development/Sandbox: <u>https://development.avalara.net</u>

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

Organization Transactions Tax Returns R	eports Too	ls Settin	gs 424 Ava	lara Custo	mer Cente	er 🥐	Avalara Hel
New Delete Activate Export <sup>144</sup> indicates default company	y, '\$' indicates separa	ate reporting enti	ity company.				
Status: All   Company Name:	Company Cod	e:	٩				
		-					
Company Name	Company Code	Status	Nexus Jurisdictions	Tax Codes	Tax Rules	Items	Locations
Faye Business Systems Group, Inc.	§ FBSG	*Active	J	<b>F</b>	P	<b>1</b>	۲





#### 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

👕 🔻 Accounts 👻 Contacts 👻 Opp	ortunities  Quotes  Documents  Notes  avatax  Success Settings tested successfully
Sugar-AvaTax Integr	ation Settings
Sugar-AvaTax Integration License:	
AvaTax Account Number:	
AvaTax License:	
AvaTax Service URL:	
AvaTax Company Code:	
Enable Logging:	8
Enable AvaTax:	8
Enable Address Validation buttons:	
AvaTax Request Timeout(ms):	3000
Go to AvaTax Admin Console	Back AvaTax Test Connection Save settings

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: <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

Accounts Contacts Opportunities	Quotes   Documents  Notes	Search	- Q 1 @)-
My Dashboard		Properties	Create
		Floors	
Learning Resources 🔥 🌾	Pipeline	Suites	^
Sugar University	2016 Q1	Quoted Line Items	
Become a Sugar expert with upgrade training,	$\rightarrow$	AvaTax	
Community Forums			
Join the discussion, problem solve, and share	Top 10 Salas Opportunitios		

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

•	Accounts 🤝	Contact	s – Opportunit	ies – Quotes –	Documents 👻	Notes <del>√</del> AvaT\ax	▼ V Sear	:h	- Q 1	2	- +
avatax									[	Crea	te 🔍
Filter •	Create Search by	/ name									
-	Name	🗢 sh	hipping address	shipping address 🜩	shipping address	shipping address 🗢	shipping address♦	Date Modified 👻	Date Created	¢	¢
	fbsg	59	950 Canoga Av	Woodland Hills	CA	91367	US	01/22/2016 04:2	12/04/2015 04:	D	۰ -

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

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

👕 👻 Accounts 👻 Contacts 👻 Opportunities 👻 Quotes 👻	waTax 👻 🖌 Search	•	Q 0	<b>4</b> - <b>+</b>
av Example		습	Cance	Save "
shipping address street				
1234 W Main St				
shipping address city	shipping address state			
Forest City	CA			
shipping address postalcode				
97550				
shipping address country				
US				

\*\***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





#### **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

👕 👻 Accounts 👻 Contacts 👻	Opportunities	Quotes 🔻 Documents 👻 Notes 👻 🖌 Search	- Q 0 ≗ - +
My Dashboard			Create 🔫
Learning Resources	^ ¢	Pipeline	^ ¢
Sugar University		2016 Q1 -	
Become a Sugar expert with upgr videos, classes, webinars, and ce	ade training, rtification.	No data available.	
Community Forums			
ideas with other users.	e, and snare	Top 10 Sales Opportunities	^ ¢
Documentation & Support		This Quarter 👻	
Learn the details of how Sugar wo engage with support.	orks and	No data available.	

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 <u>Adding a Shipping Origin Address</u> section

👕 🗝 Accounts 👻 Contacts 👻 Opport	tunities – Quotes – Documents – Notes – Pre	operties – Floors – Suites – Quoted Line Items – ava	atax - Search	<u>- a</u> • ≛ - +
Create				í
Save				
Quote Subject: *		Opportunity Name:	$\kappa \times$	
Quote Number:		Quote Stage: * Draft		
Purchase Order Num:		Valid Until: *		
Payment Terms:		Original P.O. Date:		
Description:				
Description.				
* Bill to				
Billing Account Name: *	$\star \times$	Shipping Account Name:	$ k  \times$	
Billing Contact Name:		Shipping Contact Name:		
AvaTax				
Avariax omposing origin.	× >			
avatax vat registration id:				
avatax is exempt:				
-Billing Address		Shipping Address		
Street:	Check Address	Street:	Check Address	
	10			
City:		City:		
State:		State:		
Postal Code:		Postal Code:		
Country:		Country:		





#### Using the Integration - Calculate Tax (continued)

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

Search avatax       Name	Assigned to	FBSG VPM Connector	3
		Admin Administrator Chris Olliver Jim Brennan Max Jensen	• •
My Favorites			
Search Clear			

#### avatax List

					<u></u> (1	- 2 of 2) ))
Name 😄	shipping address street ⇔	shipping address city	shipping address state ≑	shipping address postalcode ⊜	shipping address country ⊜	Date Modified ⇔
Example	1234 W Main St	Forest City	CA	97550	US	01/29/2016 09:15am
fbsg	5950 Canoga Ave. Suite 615	Woodland Hills	CA	91367	US	01/22/2016 04:22pm
					<u></u> (1	- 2 of 2) 🔊 🔊

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

Billing Account Name: *	Slender Broadband Inc	$ \mathbf{k} $ ×	Shipping Account Name:	Slender Broadband Inc	
Dining Contact Name.	Tennie Houpt	X	Shipping Contact Name:		$\kappa \times$
Avalax					
AvaTax Shipping Origin:	Example	$\kappa \times$			
avatax vat registration id:	1234				
avatax is exempt:	No				





#### 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

Billing Address			Shipping Address		
Street:	9 IBM Path	Check Address	Street:	9 IBM Path	Check Address
City:	San Mateo		City:	San Mateo	
State:	CA		State:	CA	
Postal Code:	78841		Postal Code:	78841	
Country:	USA		Country:	USA	
			Copy address from left:	✓	

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

Billing Address	
Street:	9 IBM Path Check Address
	Error Validating Address! An exact street name match could not be found - An exact street name match could not be found and phonetically matching the street name resulted in either no matches or matches to more than one street name.
City:	San Mateo
State:	CA
Postal Code:	98841
Country:	US

#### A valid email will get a success response

Billing Address		
Street:	1 Franklin Pkwy # 910	Address
	Address Validated Sucessfully!	
City:	San Mateo	
State:	CA	
Postal Code:	98841	
Country:	US	

**\*\*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)





#### 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

Grand Total	
Subtotal:	0.00
Discount:	0.00
Discounted Subtotal:	0.00
Tax:	0.00
	Calculate Tax
	(avatax also recalculates tax when the quote is saved)
Shipping:	0.00
Total:	0.00

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.

Group Name:	E Group	Group Stage:	Draft	•							
Quantity	Quoted Line Item		Mft Num	Tax Class	AvaTax (can ove	Tax Code erwrite Tax Class)	Cost		List	Unit Price	Total Discount
II 10	TK 1000 Desktop	N.	XYZ789012345	Taxable				600.00	900.0	900.00	0 <sup>i</sup>
Add Row Add	I Comment			Sub	total:	9,00	0.00				
				Disc	ount:		0.00				
				Disc Sub	ounted total:	9,00	0.00				
				Tax:		78	7.50				
						AvaTax enabl	ed				
				Ship	ping:		0.00				
Delete Group				Tota	l:	9,00	0.00				
Grand Total											
Subtotal:	g	0,000.00									
Discount		0.00									
Discounted Su	ubtotal: 9	00.00									
Tax:		787.50									
	(avatax also recalcul when the quote is sa	lates tax ved)									
Shipping:		0.00									
Total:	g	0.000,00									





#### 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.

T Accounts - Contacts - Opportunities - Quotes -	✓ Search	• Q 0 ▲ - +
Ac Slender Broadband Inc ☆ Follow		Edit 💌 «
Business Card		^ î
Website http://www.veganim.co.uk Member of Assigned to Sally Bronsen	Industry Finance Type Customer Office Phone (543) 974-2489	
AvaTax AvaTax VAT Registration ID FR123400567892 AvaTax Exempt? (US/Canada) No		^

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: <u>http://ec.europa.eu/taxation\_customs/vies/vatRequest.html</u> (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)	х 👻

\*\* **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