Avalara Integration/Configuration

Summary

This article provides a summary on how to integrate/configure Avalara in MachPanel.

Applies To

This article applies to MachPanel build v6.0.38.

Avalara Integration/Configuration

The Avalara Integration fetches either the default company\client configuration present in Avalara, or the other manually configured Tax Jurisdictions from Avalara to calculate taxes for customers created in MachPanel for their invoices and stores tax calculations.

Settings that need to be configured in Avalara account:

- Company Settings (These settings are done in Avalara AvaTax account by company itself.)

    1. Default company supported. (If we don't mention any company it will by default go to default company for both buyer/seller.)
    2. Tax jurisdictions need to be configured.

Settings that need to be configured for Avalara in MachPanel:

Navigate to following path: ***Home > System Configuration > Billing Configuration > Taxation > Tax Zones***

- Configure Tax Zones
    o Use Built-In Taxation.
- Use Avalara for Taxation: If Avalara for Taxation is selected, it will show

Avalara form.
- Avalara API inputs:

1. Account ID
2. License Key
3. URL = https://rest.avatax.com
4. Select Locale

Save Options for related Company (Provider or the reseller being configured). For a new reseller created, by default MachPanel Taxation will be ON.

Transactions handling:

- When creating new Customer/Reseller following new fields will be shown under "Personal Info" section by checking **Is Taxable:**

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1. CompanyTaxId/Vat Number (Required)
2. Tax exemption Id (Optional)

- Handled in:

  a. PCC

  b. RCC

  c. CCC

  d. STORE

  e. API

      i. Added new API call "UpdateCustomerTaxId(TaxOrVATId, ExemptionId)

      ii. Existing API for create customer or reseller is not edited

- CompanyTaxId/Vat Number and Tax Exemption Id view/edit added in:

  i. PCC

  ii. RCC

  iii. CCC

- In Offline order in PCC/CCC, Store, API handled tax using Avalara if enabled.

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- Tax will be calculated using Avalara SaleOrder, display tax amount (no percentage etc. to display, just display total tax amount with currency like USD 10.00).

MachPanel Knowledgebase

https://kb.machsol.com/Knowledgebase/55593/Avalara-IntegrationConfiguration