



Communications Onboarding Playbook

Implementation Department

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1. Tax Calculation/Implementation

The following process documents the work flow for Implementation Analysts after a sale is completed.

1.1 Purchase Complete

The customer has purchased one of Avalara Communications products.

1.1.1 Set up Communications environment and credentials for customer

1. The sales person sends **Set-up Questionnaire** to customer.
2. The sales person sends **Compliance Onboarding** and **Power of Attorney Setup** forms.
3. **(Internal task)** The Solutions Engineer completes the **New Contract Setup** form (for new customers) or **Billing and Contract Change** form (for existing customers who require changes).
4. Solution engineering notifies Accounting, QA, Support and Implementation regarding product purchase and whether the customer's API will be SOAP or REST. The products selected by the customer will include one or a combination of the following items:
 - AFC – tax engine
 - PRO – API
 - AFC Standard – batch import (FTP)
 - AFC View – look up tool
 - Returns
 - GEO – address scrub (address validation, census, and the like)
 - Rate and logic modifier (RLM)
 - The Bundler
5. IT or Support Specialist sets up customer environment in the Production and UA environments.
6. IT or Support Specialist provisions user logins for Production and UA environments.
 - Customer accesses API documentation at developer.avalara.com
 - Customer receives Swagger link

1.1.2 Set up welcome call

1. Implementation consultant schedules a welcome call and invites the support engineer, and sales person.
2. Answer questions from the customer, confirm the timeline for the Go Live date, and determine if there are roadblocks to setting up the API.
3. Determine key contacts for the project: project manager, developer, finance, and tax person, for example.
4. Schedule follow-up call if necessary.
5. Customer should start developing their API (integration) with [Avalara](https://avalara.com)

1.2 Define transactions

After the environment has been set up, the customer's catalog must be mapped to Transaction/Service pairs in AvaTax for Communications.

Note: Use the mapping documents located in U:\Shared\EAE\Communications Playbook\Implementation\afc_saaspro_docs

1.2.1 Discuss exemptions and rate overrides

1. The Go-Live Consultant provides the customer with the appropriate user documentation and the customer handles the following tasks:
 - a. Defines tax exemptions and exclusions and sends to Avalara
 - b. Determines rate overrides (extra cost for the customer).(*Note: Engineering must handle bundle rates. Avalara personnel can only assist with mapping; no tax advice provided.)
2. Implementation consultant verifies the customer is passing any customer exemptions through the API.
3. Request special tax rates that should be overridden from the customer.
(*Note: This can be performed by Avalara for an additional fee.)
4. Verify that bundle rates have been clearly defined for the API.
(*Note: The customer uses Avalara user documentation to identify and document bundles, Transaction/Service pairs with bundles and the % needed for creating the bundle file.)

1.3 Configure and test

After discussing exemptions, exclusions, overrides, and bundle rates, the customer needs to configure the API and perform tests.

1. Create a series of test transactions that will verify that Transaction/Service rates, exemptions, overrides, and bundle rates have been appropriately applied and calculating as expected.
2. Answer questions as the customer performs configuration and integration.
3. Troubleshoot any issues that might arise during the end-to-end testing by reviewing files and API requests created by the customer.

1.4 Execute Rollout

The customer is ready to go live with the Avalara for Communications API.

1. Assist the customer in the go live process and using the production environment.
2. Request that the customer sends notification that the system is working in production mode and verify a list of contacts from their company that Avalara can reach out to when necessary.
3. Review processes and best practices after Go Live is complete.
4. Transition customer information to our support organization.
5. Walk customer through close-out activities and inform them of contact information for Support and Account Manager.

1.5 Returns Onboarding

The customer has gone live with the Avalara tax engine and is ready to begin filing returns.

1. Onboarding analyst sends “Onboarding Document” to customer in order to gather information about the company and return details.
 - a. If client is not already filing returns, we will request data to determine where the client is currently collecting and what tax types are coming through the data.
 - b. If client is already filing returns, we will request previously filed returns, a tax filing calendar, and login credentials, which are all housed in the “Onboarding Document.”
 - c. Once Onboarding Document has been received, provide contacts to the operational analyst to set up compliance portal access.

2. After receiving all necessary onboarding documents, the onboarding analyst will schedule the following:
 - a. “Welcome Call” to inform the client of the compliance cycle, funding request, the compliance portal, and general return preparation process.
 - b. At this point, we will determine whether a sales order is necessary if client is asking Avalara to complete registrations on their behalf.
 - c. Onboarding analyst will determine a tentative go-live date based on the welcome call, potential registrations, and the progression of documents received.

3. If client is requiring Avalara to complete their jurisdictional registrations, then we will prepare their registrations via PDF for client approval.
 - a. Client will receive a summary document which will include the return, notes, fees, and filing method. If registration requires payment, the registration is sent to client to remit and mail.
 - b. Schedule calls as necessary depending if client has any questions about the summary document
 - c. Final registrations are sent to the onboarding analyst to prepare by either mail or online. Onboarding analyst will note when registration was put in the mail or filed online. Onboarding analyst will then reach out to client to determine date of submission of registrations they were responsible for so that it is noted in the summary document. Onboarding analyst monitors registration summary document and waits for certificates from client.
 - d. Permits are sent from client and saved in “Business Licenses” folder under the client’s Master Folder.
 - e. Onboarding analyst creates login credentials and provides them to the online filing team, so they are ready to be filed when the client officially goes live.

4. Using the Onboarding Document, the onboarding analyst will provide any online filing credentials to the online team
 - a. The onboarding analyst will coordinate a block of time between the e-filer and the client so that the e-filer can test the login credentials. This is to ensure the client provides authentication codes timely, as they expire after a certain amount of time.

- b. The e-filer will provide the onboarding analyst notes on any issues they encountered with the provided login credentials.
 - c. Schedule calls if necessary with the client to go through any login issues.
5. After receiving all documentation and registrations from the client, the onboarding analyst will set up the returns in EZFile and create a Returns List.
 - a. The Returns List is set up by internal due date and jurisdiction.
 - b. Filing frequencies and filing method are color coded:
 - Blue = annual, red=quarterly, black=monthly
 - Gray highlight = online
 - d. The Returns List will be reviewed by onboarding analysts and the transition team.
 - e. Once reviewed, the Returns List is sent to the client for final approval.
6. After client has been set up in EZFile and login credentials have been verified, the onboarding analyst is ready to transition the client to a tax analyst
 - a. A transition document has been created to note the return count, assigned e-filer, and any client quirks. This is also saved in the client's Master Folder
 - b. An introductory call is set up between the client, the tax analyst, and the direct manager
 - c. Once a month, a call occurs between the funding team and the onboarding team to ensure all POAs have been received so the funding team can perform a pre-note
 - d. The funding team assists the onboarding analysts with creating an estimated funding request
 - e. Schedule additional calls if necessary
 - f. If there are 25 returns or less on the client's Returns List, the onboarding analyst will process the first month of returns