



Avalara AvaTax for Microsoft Dynamics GP

Technical document for Avalara AvaTax

Version 01

Applies to all versions of Avalara AvaTax for Dynamics GP

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AvaTax Integration Points

Avalara AvaTax has been implemented in following area which help you to understand the customized area for AvaTax integrations.

Integrations on System Windows:

Window Name	Path	Overview
AvaTax Configuration	Microsoft Dynamics GP >> Tools >> Setup >> System >>Avalara AvaTax >> Configuration	This window is used to setup all configurations setting which are used in AvaTax for further processing with Tax calculation and Address validations and General Settings, these settings will affect tax calculation and Address validations
AvaTax User Preferences	Microsoft Dynamics GP >> Tools >> Setup >> System >>Avalara AvaTax >> User Preferences	This window is used to setup user preferences for AvaTax, used to setup functionality of AvaTax based on user logged in (Same as GP User preferences window)
AvaTax Entity Use Code	Microsoft Dynamics GP >> Tools >> Setup >> System >>Avalara AvaTax >> Entity Use Code	This window is used to setup Entity use code (These use Codes are used inside Customer Entity use code mapping)
AvaTax Shipping Codes	Microsoft Dynamics GP >> Tools >> Setup >> System >>Avalara AvaTax >> Shipping Codes	This window is used to setup Shipping codes.
AvaTax Uninstall	Microsoft Dynamics GP >> Tools >> Setup >> System >>Avalara AvaTax >> Uninstall	This window is used to Uninstall AvaTax from Dynamics GP (This will drop all tables and Data related to AvaTax)
AvaTax Setup Assistant	Microsoft Dynamics GP >> Tools >> Setup >> System >>Avalara AvaTax >> Setup Assistant	This window will guide you to complete the minimum configuration settings to calculate tax
AvaTax Reconciliation	Microsoft Dynamics GP >>Tools >> Utilities >>Avalara AvaTax >> Reconciliation	This window is used to Reconcile process to check mismatch documents in AvaTax and Dynamics GP
AvaTax Export	Microsoft Dynamics GP >>Tools >> Utilities >>Avalara AvaTax >> Export	This window is used to Export Items or Item Class to Excel files which afterwards can be imported into AvaTax Dashboard.
AvaTax Tax Schedule Update	Microsoft Dynamics GP >>Tools >> Utilities >>Avalara AvaTax >>Update>> Tax Schedule Update	This window is used to Update Tax schedule ID Customer, Vendor, Item or Site record based on selection Tax schedule ID.
AvaTax Tax Update utility	Microsoft Dynamics GP >>Tools >> Utilities >>Avalara AvaTax >>Update>> SOP Tax Update utility	This window is used to recalculate Tax for the documents inside selected batch for the document type selected on the window.
Select Options	Microsoft Dynamics GP >>Tools >> Utilities >>Avalara AvaTax >>Update>> Address validation Batch utility	This window is used to do address validations for the selected Customer/Vendor/Site Address
AvaTax Use Tax Assessment Utility	Microsoft Dynamics GP >>Tools >> Utilities >>Avalara AvaTax >>Update>>Vendor Use Tax Assessment	This window is used to Enable Use Tax assessment for Vendors
Avalara AvaTax Validated Addresses	Inquiry>>Avalara AvaTax>>Validated Addresses	This window is used to see validated Addresses for Customers/Vendors
Avalara AvaTax Reports	Reports>>Avalara AvaTax>>Reports	This window is used to print various reports available in AvaTax.

Integrations on Masters:

Window Name	Address Validation	Latitude / Longitude	Use Tax Assessment
Company Setup	Yes		
Customer Maintenance	Yes		
Customer Address Maintenance	Yes	Yes	
Vendor Maintenance	Yes		Yes
Vendor Address Maintenance	Yes		
Site Maintenance	Yes		

Integrations on Transactions (Sales Module - Windows):

Window Name	Address validation	Calculate Tax	Latitude / Longitude	Entity/ Use Code Mapping	Tax Date Override	AvaTax Inquiry	AvaTax Invoice Message	Tax Adjustment
Sales Transaction Entry		Yes				Yes	Yes	
Sales Ship to Address Entry	Yes							
Sales Item Detail Entry			Yes	Yes	Yes			
Sales Batch Entry		Yes						
Sales Transfer Documents		Yes						
Invoice Entry		Yes					Yes	
Invoice Customer Detail Entry	Yes							
Invoice Ship to Address Entry	Yes							
Invoice Item Detail Entry			Yes	Yes	Yes			
Invoice Batch Entry		Yes						
Receivables Transaction Entry		Yes	Yes	Yes	Yes		Yes	Yes
Receivables Batch Entry		Yes						
Sales Transaction Inquiry Zoom						Yes		
Invoice Inquiry						Yes		

Integrations on Transactions (Purchase Module - Windows):

Window Name	Verify Use Tax
Receiving's Transaction Entry	Yes
Purchasing Batch Entry	Yes
Purchasing Invoice Entry	Yes
Payables Transaction Entry	Yes
Payables Batch Entry	Yes