



Avalara AvaTax for Microsoft Dynamics NAV

System Integration Document for Avalara AvaTax

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1.0. AvaTax Integration Points

The following tables provide the details on the integration points for Avalara AvaTax.

Note: This document supports NAV 2015, NAV 2016, NAV 2017, and NAV 2018.

1.1. Integration on Master Page

Sr. No.	Page ID	Page Name	Address Validation	Latitude/ Longitude	Use Tax Assessment
1.	1	Company Information	Yes	No	No
2.	21	Customer Card	Yes	Yes	No
3.	22	Customer List	Yes	Yes	No
4.	26	Vendor Card	Yes	No	Yes
5.	27	Vendor List	Yes	No	Yes
6.	300	Ship-to Address	Yes	Yes	No
7.	5050	Contact Card	Yes	No	No
8.	5703	Location Card	Yes	No	No
9.	5714	Responsibility Center Card	Yes	No	No

1.2. AvaTax Exemption on Master Page

Sr. No.	Page ID	Page Name	Add Customer to Exemption	Request Exemption Certificate(s)	Retrieve Certificate(s) Status	Retrieve Certificate(s)
1.	21	Customer Card	Yes	Yes	Yes	Yes
2.	22	Customer List	Yes	Yes	Yes	Yes

1.3. Integration on Transactions (Sales Module – Page)

Sr. No.	Page ID	Page Name	Address Validation	Latitude/ Longitude	Entity/ Use Code Mapping	Tax Override Date/ Amount
1.	41	Sales Quote	Yes	Yes	Yes	Yes
2.	42	Sales Order	Yes	Yes	Yes	Yes
3.	43	Sales Invoice	Yes	Yes	Yes	Yes
4.	44	Sales Credit Memo	Yes	Yes	Yes	Yes
5.	46	Sales Order Subform	No	No	Yes	Yes
6.	47	Sales Invoice Subform	No	No	Yes	Yes
7.	95	Sales Quote Subform	No	No	Yes	Yes
8.	96	Sales Cr. Memo Subform	No	No	Yes	Yes
9.	507	Blanket Sales Order	Yes	Yes	Yes	Yes
10.	6630	Sales Return Order	Yes	Yes	Yes	Yes
11.	6631	Sales Return Order Subform	No	No	Yes	Yes
12.	9300	Sales Quotes	Yes	Yes	Yes	No
13.	9301	Sales Invoice List	Yes	Yes	Yes	No
14.	9302	Sales Credit Memos	Yes	Yes	Yes	No
15.	9303	Blanket Sales Orders	Yes	Yes	Yes	No
16.	9304	Sales Return Order List	Yes	Yes	Yes	No
17.	9305	Sales Order List	Yes	Yes	Yes	No

1.4. Integration on NAV Actions (Sales Module - Page)

Sr. No.	Page ID	Page Name	Statistics	Release	Report/ Print/ Test Report	Send Approval
1.	41	Sales Quote	Yes	No	Yes	Yes
2.	42	Sales Order	Yes	Yes	Yes	Yes
3.	43	Sales Invoice	Yes	Yes	Yes	Yes
4.	44	Sales Credit Memo	Yes	Yes	Yes	Yes
5.	132	Posted Sales Invoice	Yes	No	No	No
6.	134	Posted Sales Credit Memo	Yes	No	No	No
7.	143	Posted Sales Invoices	Yes	No	No	No
8.	144	Posted Sales Credit Memos	Yes	No	No	No
9.	507	Blanket Sales Order	Yes	Yes	Yes	Yes
10.	6630	Sales Return Order	Yes	Yes	Yes	Yes
11.	9300	Sales Quotes	Yes	No	Yes	Yes
12.	9301	Sales Invoice List	Yes	Yes	Yes	Yes
13.	9302	Sales Credit Memos	Yes	No	Yes	Yes
14.	9303	Blanket Sales Orders	Yes	Yes	Yes	Yes
15.	9304	Sales Return Order List	Yes	Yes	Yes	Yes
16.	9305	Sales Order List	Yes	No	Yes	Yes
17.	10026	Sales Order Shipment	Yes	No	Yes	No
18.	10028	Sales Order Invoice	Yes	No	Yes	No

1.5. Integration on Transactions (Service Module - Page)

Sr. No.	Page ID	Page Name	Address Validation	Latitude/ Longitude	Entity/ Use Code Mapping	Tax Override Date/ Amount	Statistics	Report/ Print/ Test Report
1.	5900	Service Order	Yes	Yes	Yes	Yes	Yes	Yes
2.	5905	Service Lines	No	No	Yes	Yes	No	No
3.	5933	Service Invoice	Yes	Yes	Yes	Yes	Yes	Yes
4.	5934	Service Invoice Subform	No	No	Yes	Yes	No	No
5.	5935	Service Credit Memo	Yes	Yes	Yes	Yes	Yes	Yes
6.	5936	Service Credit Memo Subform	No	No	Yes	Yes	No	No
7.	5964	Service Quote	Yes	Yes	Yes	Yes	Yes	Yes
8.	5966	Service Quote Lines	No	No	Yes	Yes	No	No
9.	6050	Service Contract	Yes	No	No	No	Yes	Yes
10.	6053	Service Contract Quote	Yes	No	No	No	No	Yes
11.	9317	Service Quotes	Yes	Yes	Yes	No	Yes	Yes
12.	9318	Service Orders	Yes	Yes	Yes	No	Yes	Yes
13.	9319	Service Invoices	Yes	Yes	Yes	No	Yes	Yes
14.	9320	Service Credit Memos	Yes	Yes	Yes	Yes	Yes	Yes
15.	9320	Service Contracts	Yes	No	No	No	No	No

1.6. Integration on Transactions (Purchase Module - Page)

Sr. No.	Page ID	Page Name	Statistics
1.	50	Purchase Order	Yes
2.	51	Purchase Invoice	Yes
3.	9307	Purchase Order List	Yes
4.	9308	Purchase Invoices	Yes

2.0. AvaTax Integration Codeunit

2.1. Address Validation

The following process is used to perform the Avalara Address Validation in the custom page:

2.1.1. Approach A

If you want to use Avalara Address Validation in custom page under Action, then add the below-mentioned code to the action code.

Code:

```
Codeunit .run(14073355, Customer);
```

Note: The Codeunit is only applicable to the Master Pages like **Customer, Vendor, and Location**.

Avalara AvaTax also consists of Codeunit for Vendor and Location, like the Customer.

Sr. No.	Type	ID	Name
1.	Codeunit	14073355	AVA3rd AddressValid_Customer
2.	Codeunit	14073356	AVA3rd AddressValid_Vendor
3.	Codeunit	14073357	AVA3rd AddressValid_Location

2.1.2. Approach B

If you want to use Avalara Address Validation in custom page, then add the below publisher action under the Action, in the Page – Action Designer.

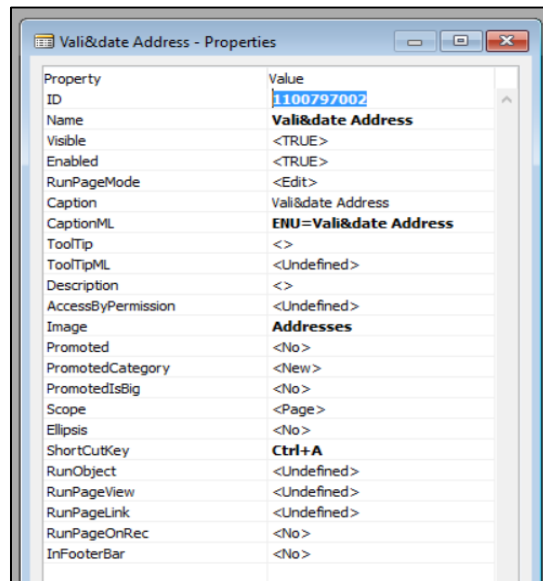
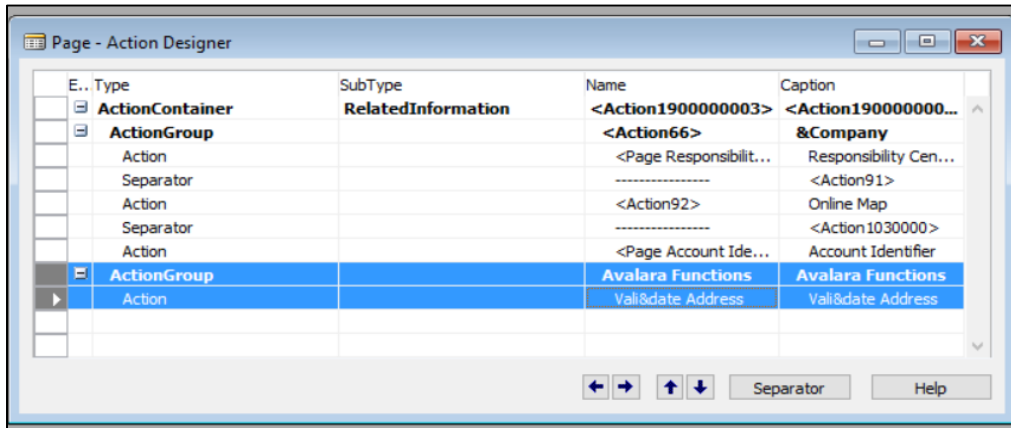
Avalara AvaTax uses the same Action in the Subscriber function from the custom page or custom Codeunit.

The Approach B can only be used for the custom page which consists of the following Source Tables:

Sr. No.	Source Table
1.	Customer
2.	Ship-to Address
3.	Vendor
4.	Company Information
5.	Responsibility Center
6.	Contact

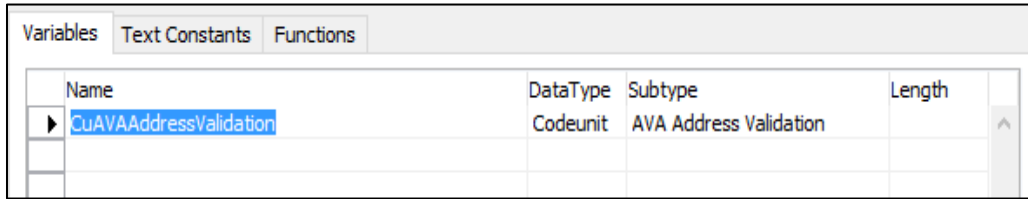
Step to create Publisher

- a) Create Action in a Page – Action Designer, to use the Avalara Address Validation.

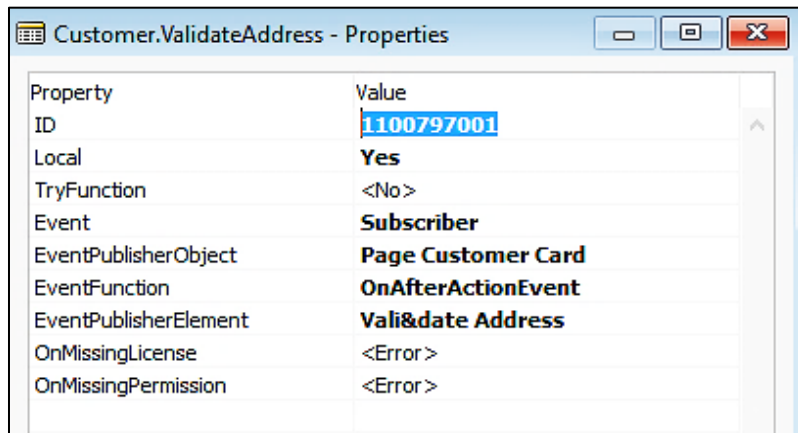
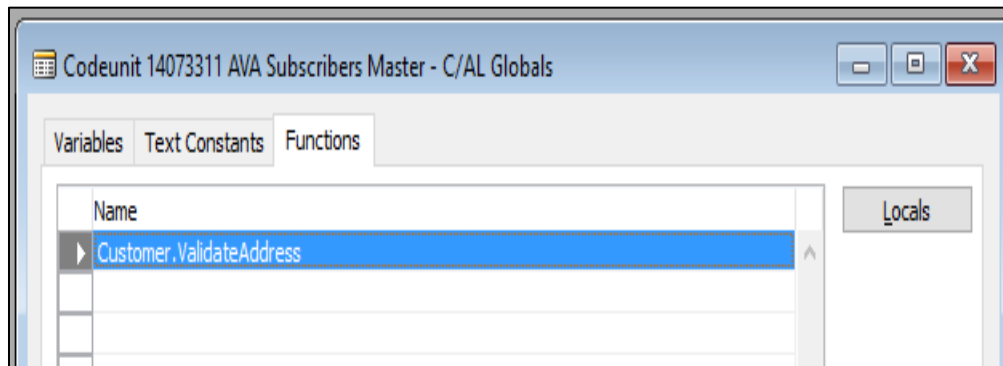


Steps to create Subscriber

- a) After the Action is created, use the Publisher/ Subscriber Model to add the code.
- b) Go to the custom Codeunit and add a new Global variable.



- c) Create new function and set the properties.



- d) Add the code as,

```

LOCAL [EventSubscriber] Customer.ValidateAddress(VAR Rec : Record Customer)
CuAVAAAddressValidation.AvaMasterAddrValidateClass(Rec);
    
```

2.2. Calculate Tax for Transaction: Sales

- If you want to calculate tax through custom action or function call, use the Avalara exposed Codeunit directly.
- Use the below CODEUNIT and pass the respective Sales Header.
- The tax is calculated and updated to the same Sales Header and the respective Sales Line table.

Code:

```
CODEUNIT.RUN(14073350,SalesHeader);
```

2.3. Update Transaction Lines with Tax: Sales

- If you want to retrieve “Sales Line - Amount Including VAT” through any custom action or function call, use the Avalara exposed Codeunit directly. This updates tax to the “Amount Including VAT” field.
- Use the below CODEUNIT and pass the respective Sales Line.
- The Amount with tax is populated from the Avalara table.

Code:

```
CODEUNIT.RUN(14073351,SalesLine);
```

2.4. See AvaTax Statistics Page on Transaction: Sales

- If you want to view and calculate the tax through custom action or function call, use the Avalara exposed Codeunit directly.
- Use the below CODEUNIT and pass the respective Sales Header.
- The tax is calculated and updated to the same Sales Header and the respective Sales Line table.

Code:

```
CODEUNIT.RUN(14073358,SalesHeader);
```

2.5. Calculate Tax for Transaction: Service

- If you want to calculate tax through custom action or function call, use the Avalara exposed Codeunit directly.
- Use the below Codeunit and pass the respective Service Header.
- The tax is calculated and updated to the same Service Header and the respective Service Line table.

Code:

```
CODEUNIT.RUN(14073352,ServiceHeader);
```

2.6. Update Transaction Lines with Tax: Service

- If you want to retrieve “Service Line - Amount Incl. VAT” through any custom action or function call, use the Avalara exposed Codeunit directly. This updates the tax to the “Amount Including VAT” field.
- Use the below CODEUNIT and pass the respective Service Line.
- The Amount with tax is populated from the Avalara table.

Code:

```
CODEUNIT.RUN(14073353,ServiceLine);
```

2.7. See AvaTax Statistics Page on Transaction: Service

- If you want to view and calculate the tax through custom action or function call, use the Avalara exposed Codeunit directly.
- Use the below CODEUNIT and pass the respective Sales Header.
- The tax is calculated and updated to the same Sales Header and the respective Sales Line table.

Code:

```
CODEUNIT.RUN(14073359,SalesHeader);
```