



Avalara AvaTax for Microsoft Dynamics Great Plains

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.

1.1. Integration on System Windows

Sr. No.	Window Name	Path	Descriptions
1.	AvaTax Configuration	Microsoft Dynamics GP >> Tools >> Setup >> System >> Avalara AvaTax >> Configuration	<ul style="list-style-type: none"> This window is used to setup all the configuration setting which are used in AvaTax for further processing with Tax Calculation, Address Validation, and General Settings. The settings affect the Tax Calculation and Address Validation.
2.	AvaTax User Preferences	Microsoft Dynamics GP >> Tools >> Setup >> System >> Avalara AvaTax >> User Preferences	<ul style="list-style-type: none"> This window is used to setup user preferences for AvaTax. It is used to setup functionality of AvaTax based on the user Login.
3.	AvaTax Entity/ Use Codes	Microsoft Dynamics GP >> Tools >> Setup >> System >> Avalara AvaTax >> Entity/ Use Codes	<ul style="list-style-type: none"> This window is used to setup the Entity/Use Codes.
4.	AvaTax Shipping Codes	Microsoft Dynamics GP >> Tools >> Setup >> System >> Avalara AvaTax >> Shipping Codes	<ul style="list-style-type: none"> This window is used to setup Shipping Codes.
5.	AvaTax UnInstall	Microsoft Dynamics GP >> Tools >> Setup >> System >> Avalara AvaTax >> UnInstall	<ul style="list-style-type: none"> This window is used to UnInstall AvaTax from Microsoft Dynamics GP. It drops all Tables and Data related to AvaTax.
6.	AvaTax Setup Assistant	Microsoft Dynamics GP >> Tools >> Setup >> System >> Avalara AvaTax >> Setup Assistant	<ul style="list-style-type: none"> This window will guide you to complete the minimum configuration settings to calculate tax.
7.	AvaTax Reconciliation	Microsoft Dynamics GP >> Tools >> Utilities >> Avalara AvaTax >> Reconciliation	<ul style="list-style-type: none"> This window is used to check the mismatch of the documents available in the AvaTax and Microsoft Dynamics GP.
8.	AvaTax Export	Microsoft Dynamics GP >> Tools >> Utilities >> Avalara AvaTax >> Export	<ul style="list-style-type: none"> This window is used to Export Items or Item Class to excel files which afterwards can be imported into AvaTax Dashboard.
9.	AvaTax Tax Schedule Update	Microsoft Dynamics GP >> Tools >> Utilities >> Avalara AvaTax >> Update >> Tax Schedule Update	<ul style="list-style-type: none"> This window is used to update the Tax Schedule ID of Customer, Vendor, Item or Site record based on the selected Tax Schedule ID.
10.	AvaTax Tax Update Utility	Microsoft Dynamics GP >> Tools >> Utilities >> Avalara AvaTax >> Update >> SOP Tax Update Utility	<ul style="list-style-type: none"> This window is used to recalculate tax for the selected Document Type and Batch from the AvaTax Tax Updated Utility.
11.	Select Options	Microsoft Dynamics GP >>Tools >> Utilities >> Avalara AvaTax >> Update >> Address Validation Batch Utility	<ul style="list-style-type: none"> This window is used to perform address validation for the selected Customer/Vendor/Site Address.

Sr. No.	Window Name	Path	Descriptions
12.	AvaTax Use Tax Assessment Utility	Microsoft Dynamics GP >> Tools >> Utilities >> Avalara AvaTax >> Update >> Vendor Use Tax Assessment	<ul style="list-style-type: none"> This window is used to enable Use Tax Assessment for Vendors.
13.	Avalara AvaTax Validated Addresses	Inquiry >> Avalara AvaTax >> Validated Addresses	<ul style="list-style-type: none"> This window is used to view the Validated Addresses of the Customers/Vendors.
14.	Avalara AvaTax Reports	Reports >>Avalara AvaTax >> Reports	<ul style="list-style-type: none"> This window is used to print various reports available in AvaTax.

1.2. Integration on Masters

Sr. No.	Window Name	Address Validation	Latitude/ Longitude	Use Tax Assessment
1.	Company Setup	Yes	No	No
2.	Customer Maintenance	Yes	No	No
3.	Customer Address Maintenance	Yes	Yes	No
4.	Vendor Maintenance	Yes	No	Yes
5.	Vendor Address Maintenance	Yes	No	No
6.	Site Maintenance	Yes	No	No

1.3. Integration on Transactions (Sales Module - Windows)

Sr. No.	Window Name	Address Validation	Calculate Tax	Latitude/ Longitude	Entity/ Use Code Mapping	Tax Date Override	AvaTax Inquiry	AvaTax Invoice Message
1.	Sales Transaction Entry	No	Yes	No	No	No	Yes	Yes
2.	Sales Ship to Address Entry	Yes	No	No	No	No	No	No
3.	Sales Item Detail Entry	No	No	Yes	Yes	Yes	No	No
4.	Sales Batch Entry	No	Yes	No	No	No	No	No
5.	Sales Transfer Documents	No	Yes	No	No	No	No	No
6.	Invoice Entry	No	Yes	No	No	No	No	Yes
7.	Invoice Customer Detail Entry	Yes	No	No	No	No	No	No
8.	Invoice Ship to Address Entry	Yes	No	No	No	No	No	No

Sr. No.	Window Name	Address Validation	Calculate Tax	Latitude/ Longitude	Entity/ Use Code Mapping	Tax Date Override	AvaTax Inquiry	AvaTax Invoice Message
9.	Invoice Item Detail Entry	No	No	Yes	Yes	Yes	No	No
10.	Invoice Batch Entry	No	Yes	No	No	No	No	No
11.	Receivables Transaction Entry	No	No	No	No	No	No	No
12.	Receivables Batch Entry	No	No	No	No	No	No	No
13.	Sales Transaction Inquiry Zoom	No	No	No	No	No	Yes	No
14.	Invoice Inquiry	No	No	No	No	No	Yes	No

1.4. Integration on Transactions (Purchase Module - Windows)

Sr. No.	Window Name	Verify Use Tax (AvaTax)
1.	Receivings Transaction Entry	Yes
2.	Purchasing Batch Entry	Yes
3.	Purchasing Invoice Entry	Yes
4.	Payables Transaction Entry	Yes
5.	Payables Batch Entry	Yes