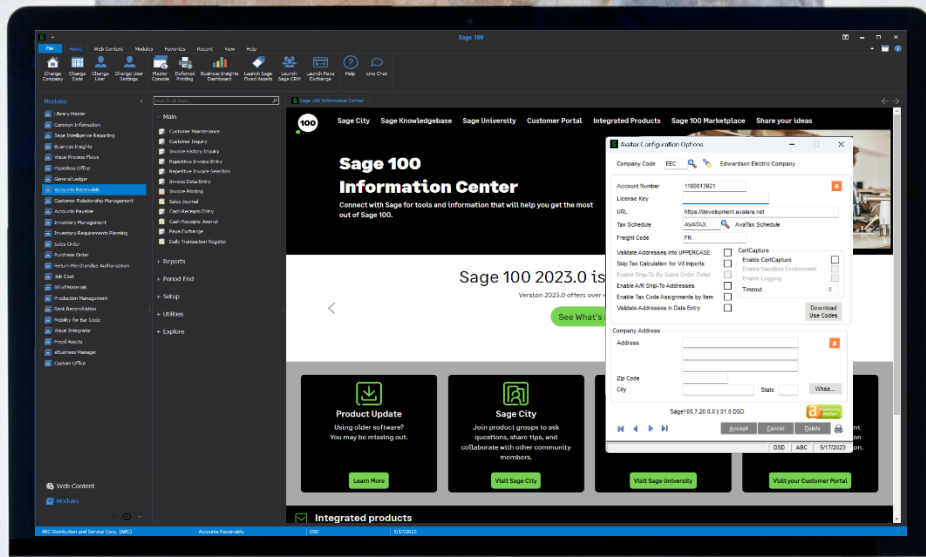


Sage



DSD BUSINESS SYSTEMS

SAGE 100 ENHANCEMENTS

LMAV

AVATAX CONNECTOR FOR SAGE 100

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AvaTax Connector for Sage 100 User Manual

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Section A: Introduction

This manual contains a description and instructions for this DSD product. Operating instructions are included for the features added by this product to Sage 100. For instructions on using Sage 100, refer to the appropriate Sage 100 manual, or call your Sage 100 reseller.

AvaTax Connector Features

Trying to keep up with all the demands of sales and use tax compliance can feel like a balancing act, especially given how frequently rates and rules change. Avalara's suite of automated solutions gives you a better way.

Avalara provides a suite of sales tax compliance solutions that helps thousands of companies save time and money, by working behind the scenes to calculate, collect, file, and remit taxes. In addition, as one of the few state-certified service providers for Streamlined Sales Tax (SST), Avalara can offer free sales tax services in nearly half of the U.S. for eligible businesses.

Avalara AvaTax:

- Delivers sales tax calculation as the transaction takes place, cross-checking thousands of rates, rules, and jurisdictional boundaries for more accurate results.
- Removes the time and hassle of researching tax rates and product taxability rules.
- Improves tax determination accuracy.
- Supports global tax compliance (VAT, GST)

Avalara Returns:

- A seamless end-to-end service that prepares and files your returns and handles remittance according to a filing calendar you can easily manage online.
- Manages monthly tax prep, filing, and payments.
- Handles responses to tax notices from tax authorities.
- Simplifies treasury management with a single ACH transfer to cover all sales tax liabilities.

Avalara CertCapture (Version 2021 and above):

- Collect, validate, and store all compliance documents in one central, secure repository for instant access and accountability.
- Automates the manual process of managing exempt sales.
- Provides an exemption only when a valid certificate is available.
- Integrates with ecommerce or POS checkout to capture certificates at point of purchase.

Section B: Getting Started



Important – Read this section prior to installing this enhancement.

Updated Modules

This enhancement modifies several Sage 100 modules. If you reinstall one of the Sage 100 modules listed in the following table, you must also reinstall this enhancement. **Enhancements from different Sage Tech Partners may not be designed to work together.**

Module	LMAV
Library Master	✓
Common Information	✓
Accounts Payable	✓
Accounts Receivable	✓
Purchase Order	✓
Sales Order	✓
Inventory Management	✓
Job Cost	✓

If you are upgrading Sage 100 with a Product Update, check the DSD website for compatibility before upgrading. A new version of the enhancement may be required.

If you are upgrading Sage 100 to a new version (e.g., 2021 to 2023), you must obtain the latest compatible release from the DSD website prior to installing and converting.

Ensure the compatibility of all enhancements with the version being upgraded to prior to starting the installation process. Work with your reseller to ensure that enhancements are compatible with each other and note the proper order in which they should be installed.

Installation

Back-up: Exit all Sage 100 sessions. Back-up existing Sage 100 data.

Check Levels: Sage 100 module levels must match those listed above.

Run Enhancement Setup Program: Save the executable installation program (sent to you or downloaded from our website) in a convenient location on the Sage 100 server. Launch the program from Windows Explorer or by selecting Start/Run, and then browse for the file in the location you saved it. Follow on-screen instructions.

Re-Start Sage 100: Sage 100 will be updated.

Update Security: After installation, you may not see the modules you installed on the Launcher menu. You will need to update all your security Roles to include access to the newly installed modules. Make sure your user has sufficient rights to modify Role Maintenance and add access to the new DSD enhancements to the appropriate Roles.



If this is your first DSD enhancement, make sure to add the DSD Enhancement Control Panel in the Library Master module to an appropriate Role.

Product Registration: Contact Avalara for product registration. All Registration/Unlocking occurs on the AvaTax Configuration menu item, and unlocking keys are provided by Avalara, not DSD.

DSD Enhancement Control Panel



AvaTax will display in the DSD Enhancement Control Panel, however **there is no DSD Unlocking Key for the AvaTax integration.** All Registration/Unlocking occurs on the AvaTax Configuration menu item, and unlocking keys are provided by Avalara, not DSD.

Uninstall Enhancement: If this option is available, then selecting this button will start the un-install process, removing the enhancement from the system. For more information see [Uninstall DSD Enhancements](#).

Section C: Setup

AvaTax Configuration Options

The AvaTax Configuration Options is accessible from the Library Master Setup Menu.

Company Setup

Company Code: Enter the Company Code to setup for AvaTax integration. An <F2> ALE Lookup is available to select a listing of ALL Company Codes in Sage 100. An <F3> ALE Search is available to list only those company codes setup for AvaTax.

Account Number: Enter the Account Number assigned by Avalara. Please contact Avalara to get this setting.

License Key: Enter the License Key assigned by Avalara. Please contact Avalara to get this setting.

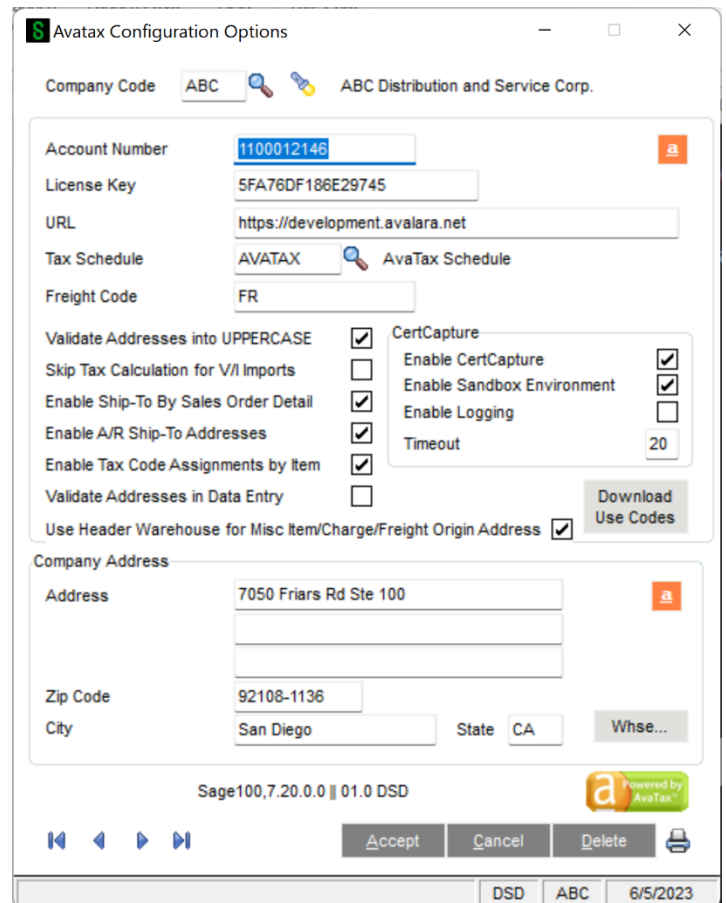
URL: Enter the URL assigned by Avalara. Enter <https://development.avalara.net> if you have an AvaTax development account or <https://avatax.avalara.net> if you have an AvaTax production account.

Tax Schedule: Enter the Tax Schedule to use for AvaTax tax calculations. The default is "AVATAX". DSD recommends that this default be used.

Freight Code: Enter the Freight Code to be used in the AvaTax Dashboard. This code will be used for taxable Freight Amounts on data entry documents.

Validate Addresses into UPPERCASE: Select this checkbox to have AvaTax Address Validation update the validated address in all UPPERCASE.

Skip Tax Calculation for V/I Imports: Select this checkbox to skip Tax Calculations when using Visual Integrator (V/I) importing into the A/R and S/O data entries. Since the AvaTax calculation



occurs on the creation of an order or invoice, and is done as a web service, if you are importing a large dataset, the import process could be slow. If you choose to skip the tax calculation, then you can use the standard Sage Sales Tax Calculation utility on the Sales Order / Utilities menu to batch update the sales tax.

Enable Ship-To by Sales Order Detail: Select this checkbox to enable Ship-To Address fields at the line level in Sales Order Entry and Invoice Date Entry. When enabled, AvaTax will use the line address as the Point of Destination, rather than the Header Ship-To Address.

Enable A/R Ship-To Addresses: Select this checkbox to enable the Ship-To Address button on the Main Tab in A/R Invoice Data Entry. When enabled, AvaTax will use the Ship-To address as the Point of Destination, rather than the Customer Address.

Enable Tax Code Assignments by Item: Select this checkbox to allow Tax Code assignments on items in Item Maintenance and Miscellaneous Item Maintenance. The Tax Code that is assigned to the Item Code will be used as the line-level Tax Class, in lieu of TX. These Tax Codes are custom-defined in the AvaTax dashboard for unique tax rules.

Validate Addresses in Data Entry: Select this checkbox to enable Company and Destination Address validations during Data Entry. **NOTE that this will increase the number of Address Validation calls to Avalara.**

Use Header Warehouse for Misc Item/Charge/Freight Origin Address: Select this checkbox to enable using the Sales Order / SO Invoice Header Warehouse as the Point of Origin address for Miscellaneous Items, Miscellaneous Charges, and Freight.

Company Address: Enter the Company Address information for the Company Code selected. Select the orange AvaTax button to the right of the Address to do an Address Validation.

Download Use Codes: Click this button to download Entity Use Codes from the Avalara site to Sage 100. Entity Use codes can be assigned at the line item level in data entry tasks in the S/O and A/R modules.

Enable CertCapture (Version 2021 and above): Select this checkbox option to enable CertCapture functionality for Avatax.

Enable Sandbox Environment: Select this checkbox option to enable CertCapture for a Sandbox environment. When enabled, the URL used for all API communications will be assigned to a Non-production environment. When not enabled, the URL used for all API communications will be assigned to the Production environment.

Enable Logging: Select this checkbox to enable the logging of CertCapture transactions to and from Sage 100 and CertCapture. Log file transaction will be written to a file saved in the MAS90\MAS_SYSTEM\LogFiles directory.

Time Out: Enter a time out number in seconds. The time out assigned will be used when communicating with CertCapture. If the system’s internet speed is limited, it is advisable to increase the number of seconds to account for this latency or timeouts may result. A default value of 20 seconds will be assigned, and a value less than that won’t be accepted.

Warehouse Code Setup

Select the **Whse...** button to the right of the Company address section to access **AvaTax Configuration Warehouse Code Maintenance**.

Warehouse Code: Enter the Warehouse Code to setup for AvaTax integration. An <F2> ALE Lookup is available to select a listing of ALL Warehouse Codes in Sage 100.

Warehouse Address: Enter the address for this Warehouse Code.

Select the orange AvaTax button to the right of the Warehouse Address to do an Address Validation.

This address will be used as the Point of Origin Address in Sales Order Entry and S/O Invoice Data Entry when doing tax calculations.

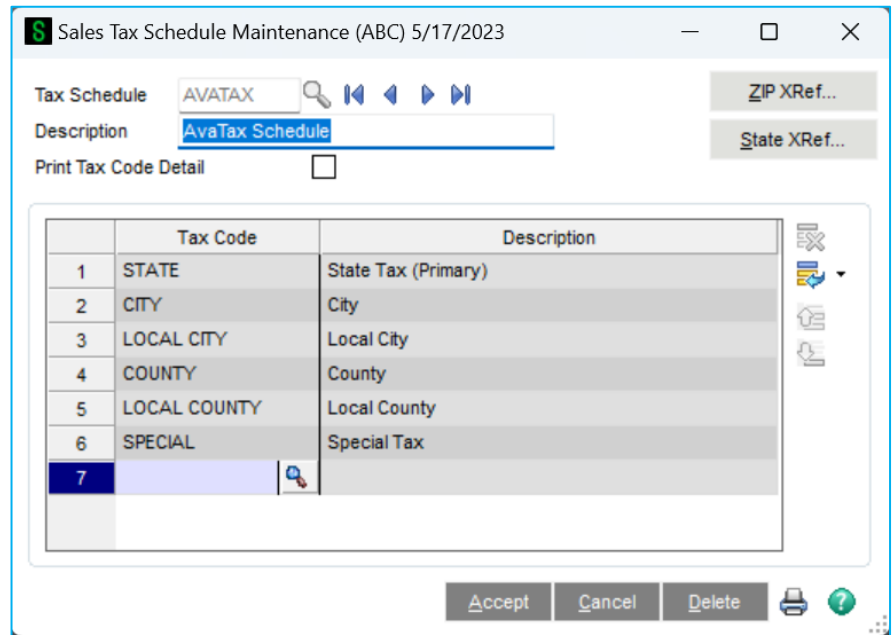
AvaTax Configuration Options Listing

Select the **Printer** button to print the print the Options Listing for the AvaTax Configuration.



AVATAX Tax Schedule

Once the AvaTax Configuration Options has been setup, a new **AVATAX** Tax Schedule is automatically created in Sales Tax Schedule Maintenance. The Sales Tax Codes are also created as STATE, CITY, LOCAL CITY, COUNTY, LOCAL COUNTY, and SPECIAL. NT, TF, and TX Tax Classes are assigned to each of these Tax Codes with no Tax Rates. The Tax Rates are calculated on-the-fly during the AvaTax Tax Calculation process.



AvaTax Configuration Tax Schedule Update

The AvaTax Configuration Tax Schedule Update is accessible from the Library Master Setup Menu.

Avatax Configuration Address Tax Schedule Update Log

ABC Distribution and Service Co

AVATAX CONFIGURATION ADDRESS TAX SCHEDULE UPDATE LOG

CUSTOMER NUMBER	SHIP-TO CODE	NAME	OLD TAX SCHEDULE	OLD TAX CODE	EXEMPTION NUMBER	EXCEPTION
01-ABF		American Business Futures	WI MILMIL	WI	584739586898975	
				WI MIL	584739586898975	
				WI MILMIL	584739586898975	
01-ABS	1	American Business Futures	WI MILMIL	WI	584739586898975	
				WI MIL	584739586898975	
				WI MILMIL	584739586898975	
01-ABS	2	American Business Futures	WI	WI		
	1	ABS - Sage cloud for invoices American Business Futures	NONTAX WI MILMIL	NONTAXABLE WI		
01-AVNET		American Business Futures	WI	WI		
	1	Avnet Processing Corp	WI	WI	12-267542	
	2	Avnet Processing Corp Irvine Warehouse	CA	CA	12-267542	

AvaTax Configuration Address Validation

The AvaTax Configuration Address Validation is accessible from the Library Master Setup Menu.

This utility allows existing addresses for Customers, Customer Ship-To Codes, Vendors, and Vendor Purchases to be batch-validated with the AvaTax Address Validation service.

Scan and Report: Select this option to only scan the Customer and/or Vendor range of records and report which customers/vendors will be changed to have the AVATAX-validated address.

Scan, Update, and Report: Select this option to scan the Customer and/or Vendor range of records, report which customers/vendors will be changed to have the AVATAX-validated address, and do the actual update of the Customer and Vendor records.

 **It is recommended that you complete a full backup of your company data prior to using this option.**

Avatax Configuration Address Validation

Scan and Report
 Scan, Fix, and Report

Customer Customer Ship To Addresses
 Vendor Addresses Vendor Purchase Addresses

All Starting Ending

Customer Number 00

Vendor Number 00-

Proceed Cancel

DSD ABC 5/17/2023

Customer: Select this option to scan/report/update the Customer records.

Customer Ship To Addresses: Select this option to scan/report/update the Customer Ship-To records.

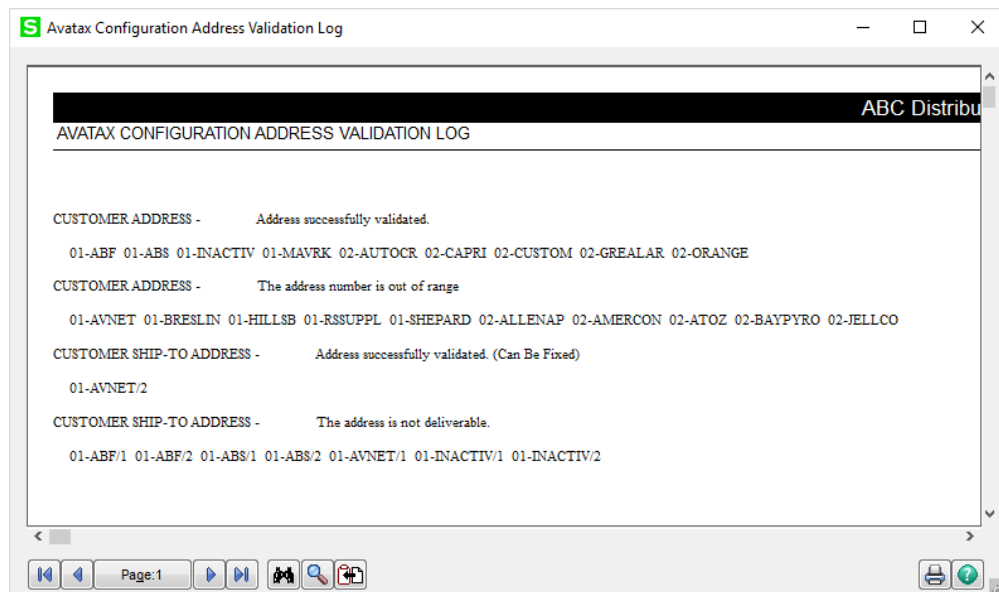
Vendor Addresses: Select this option to scan/report/update the Vendor records.

Vendor Purchase Addresses: Select this option to scan/report/update the Vendor Purchase Address records.

Customer selection range: Select the customer range to report/update.

Vendor selection range: Select the vendor range to report/update.

The **AvaTax Configuration Address Validation Log** will show the Customer, Customer Ship-To records, Vendor, and Vendor Purchase Address records selected, along with the address validation responses.



Section D: System Operations

Customer Maintenance

A new orange AvaTax Button has been added to the Customer Maintenance / Main Panel, to the right of the Address Line 2 field. Select this button to do an AvaTax Address Validation.


Customer Maintenance (ABC) 5/17/2023

Customer No. 01-ABF

Name American Business Futures

1. Main 2. Additional 3. Statistics 4. Summary 5. History 6. Invoices 7. Transactions 8. S/Os 9. CertCapture

Country USA United States Residential

Address 2131 N. 14th Street 

Suite 100

Accounting Department

ZIP/Postal Code 53205-1204

City Milwaukee State/Province WI

Telephone (414) 555-4787 Ext 219 Work

Fax

E-mail Address artie@sage.sample.com

URL Address www.abf.com

Terms Code 01 Net 30 Days

Primary Contact ARTE JOHN Artie Johnson

Ship Code UPS BLUE

Primary Ship To 2 American Business Futures

Credit Hold

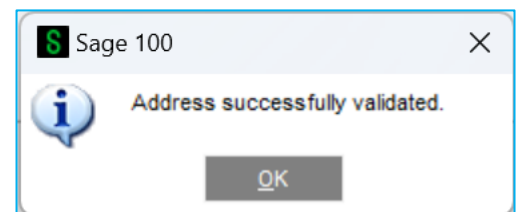
Credit Limit 120,000.00

Salesperson 0100 Jim Kentley Split Comm...

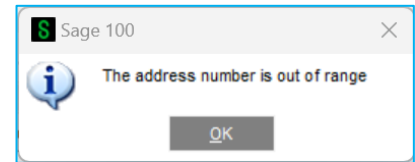
Tax Schedule WI MILMIL Milwaukee Exemptions...

Accept Cancel Delete

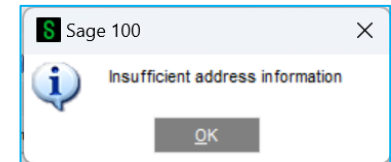
If the address can be properly validated, then the user will be prompted as follows, and the Customer Address will be updated to the Customer Maintenance Panel. The new address will only be saved to the Customer if the Accept button is selected in Customer Maintenance. If the Cancel Button is selected, then the original address will be saved. If the "Validate Addresses into UPPERCASE" checkbox in AvaTax Configuration Options has been selected, then the validated address will be updated in upper-case.



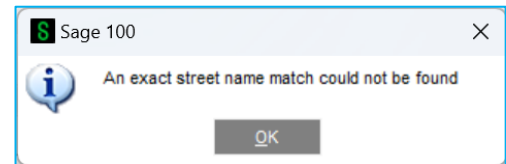
If the AvaTax Address Validation cannot validate the address due to a **street number not existing for the street name**, then the user will be prompted as follows, and the address will not be updated.



If the AvaTax Address Validation cannot validate the address due to **one or more address fields missing**, then the user will be prompted as follows, and the address will not be updated.



If the AvaTax Address Validation cannot validate the address due to **incorrect address, or the address does not exist**, then the user will be prompted as follows, and the address will not be updated.

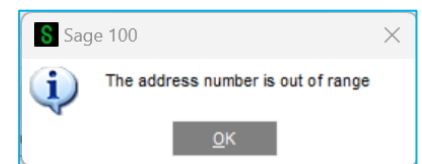


Customer Maintenance / Ship-To Address

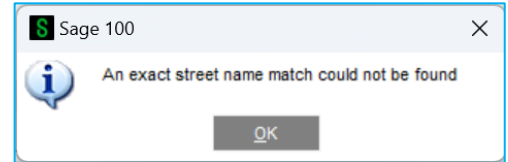
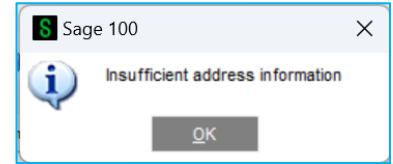
A new orange AvaTax Button has been added to the Customer Maintenance / Ship-To Address Panel, to the right of the Address Line 2 field. Select this button to do an AvaTax Address Validation.

If the address can be properly validated, then the user will receive a message that the address has been successfully validated, and the Customer Ship-To Address will be updated to the Ship-To Address Panel. The new address will only be saved to the Ship-To Code if the Accept button is selected. If the Cancel Button is selected, then the original address will be saved. If the “Validate Addresses into UPPERCASE” checkbox in AvaTax Configuration Options has been selected, then the validated address will be updated in upper-case.

- If the AvaTax Address Validation cannot validate the address due to a **street number not existing for the street name**, then the user will be prompted as follows, and the address will not be updated.




- If the AvaTax Address Validation cannot validated the address due to **one or more address fields missing**, then the user will be prompted as follows, and the address will not be updated.
- If the AvaTax Address Validation cannot validated the address due to **incorrect address, or the address does not exist**, then the user will be prompted as follows, and the address will not be updated.



Customer Maintenance / CertCapture (Version 2021 & above)

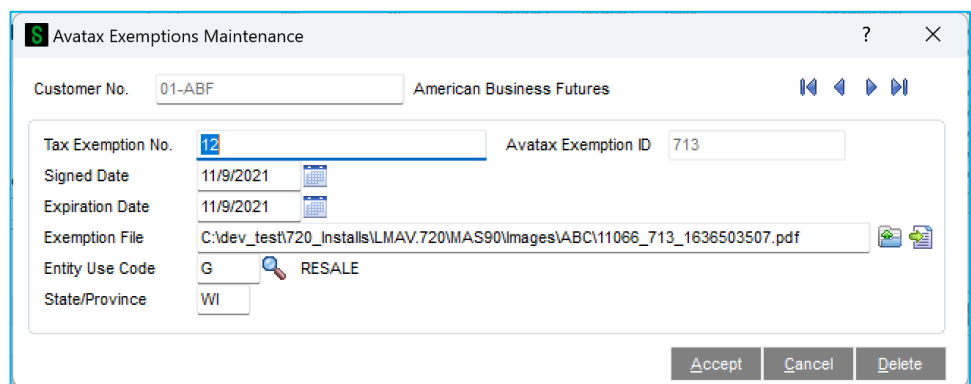
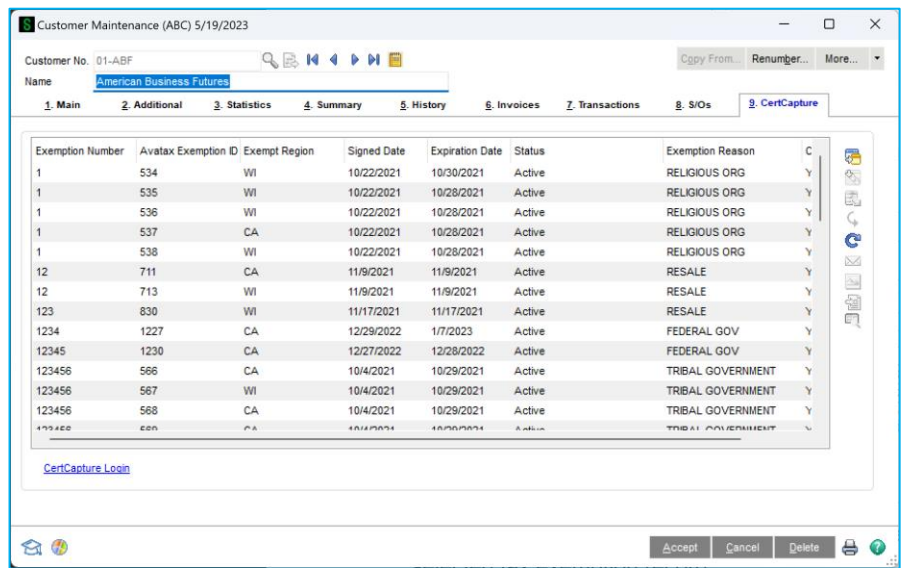
A new “CertCapture” tab has been added to the Customer Maintenance screen. The tab will provide access to view, maintain, and synchronize exemption certificate information between Sage 100 and CertCapture.

 **The CertCapture tab will be disabled if the Avatax Configuration Option is not enabled.**

Buttons have been added to the screen to allow the following tasks:

1. Add new tax exemptions for the customer.

- This task will invoke a dialog allowing the entry of new Tax Exemption records.
- Tax Exemptions created here are stored only in Sage.
- Exemptions can be uploaded to CertCapture using the “Upload Exemption” button task.



2. Drill down and maintain existing tax exemptions.

- This task will invoke the Avatax Exemption Maintenance dialog to allow modifications to the selected tax exemption record.

3. Upload Exemption to CertCapture

- Tax Exemptions created in Avatax Exemption Maintenance will be uploaded to CertCapture
- After a successful upload, an Avatax Exemption ID will be retrieved and saved with the exemption record in Sage.
- This ID can be used to reference certificates while in the CertCapture dashboard.

4. Revoke Exemption in CertCapture

- This task will change the Exemption Certificate status to “Inactive” in CertCapture

5. Refresh Exemptions

- This task will perform a bidirectional synchronization between Sage 100 and CertCapture exemption certificates.
 - Tax exemptions created in Sage will be uploaded to CertCapture
 - Tax exemptions created in the CertCapture dashboard will be download to Sage.

6. Request Exemption from Customer

- This task will execute a Request for Certificate to the active customer
- The email address assigned to the customer record will be used for this request.

7. Download Exemption Certificate Image from CertCapture (PDF)

- This task will perform a download of a certificate image assigned to an exemption in CertCapture.

8. Upload Exemption Certificate Image to CertCapture (PDF)

- This task will perform an upload to CertCapture of a certificate image assigned to an exemption in Sage.

9. View Exemption Certificate Image

- This task will invoke an associated certificate image for viewing

Additionally, a CertCapture Login hyperlink has been added to the screen to enable quick access to the web login page.

Sales Tax Calculation

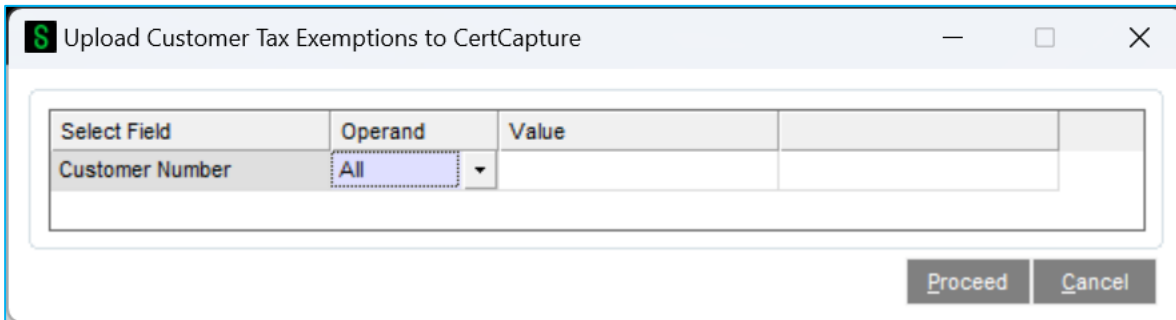
The Sage Sales Tax Calculation program for A/R and S/O has been modified for CertCapture as follows:

- If CertCapture is enabled in Sage, and a tax exemption certificate for the document’s Ship To Exposure Zone (Ship to State) exists in CertCapture, the exemption credentials assigned in CertCapture will determine the document’s tax exemption status and calculate sales tax accordingly.
- Tax Exemptions assigned to the document in Sage will be ignored.

Batch Exemption Upload Utility

The A/R Utilities Menu has been modified to include a new batch exemption upload utility:

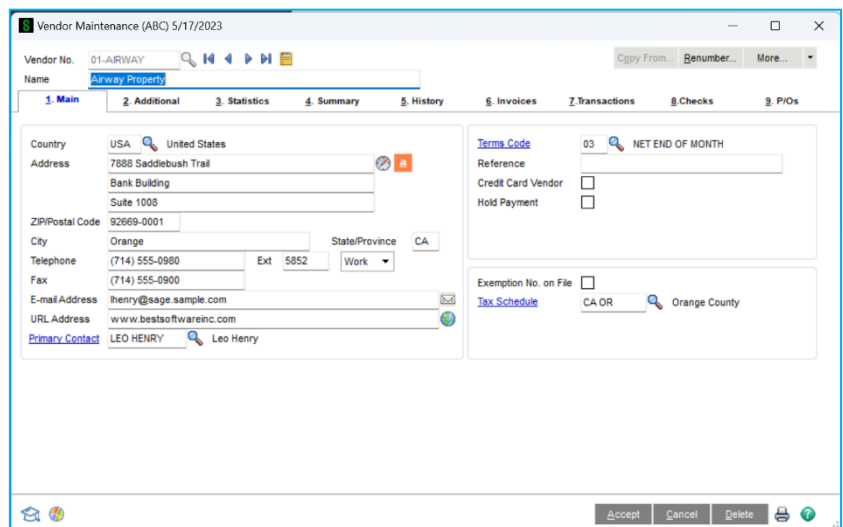
- “Upload Customer Tax Exemptions to CertCapture”
- This utility allows a batch update and synchronization of customers and their associated exemption certificates from Sage to CertCapture, and from CertCapture to Sage.



Vendor Maintenance

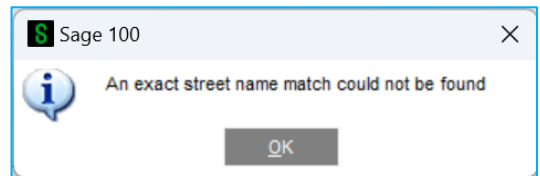
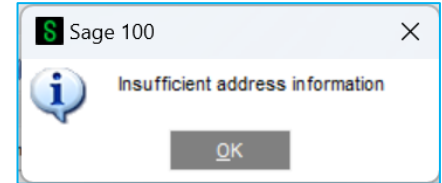
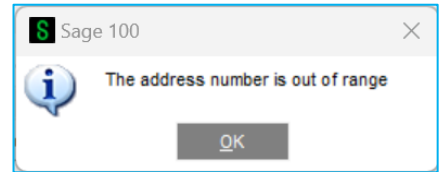
A new orange AvaTax Button has been added to the Vendor Maintenance / Main Panel, to the right of the Address Line 2 field. Select this button to do an AvaTax Address Validation.

If the address can be properly validated, then the user will receive a message that the address has been successfully validated, and the Vendor Address will be updated to the Vendor Maintenance Panel. The new address will only be saved to the Vendor if the Accept button is selected in Vendor Maintenance.



If the Cancel Button is selected, then the original address will be saved. If the “Validate Addresses into UPPERCASE” checkbox in AvaTax Configuration Options has been selected, then the validated address will be updated in upper-case.

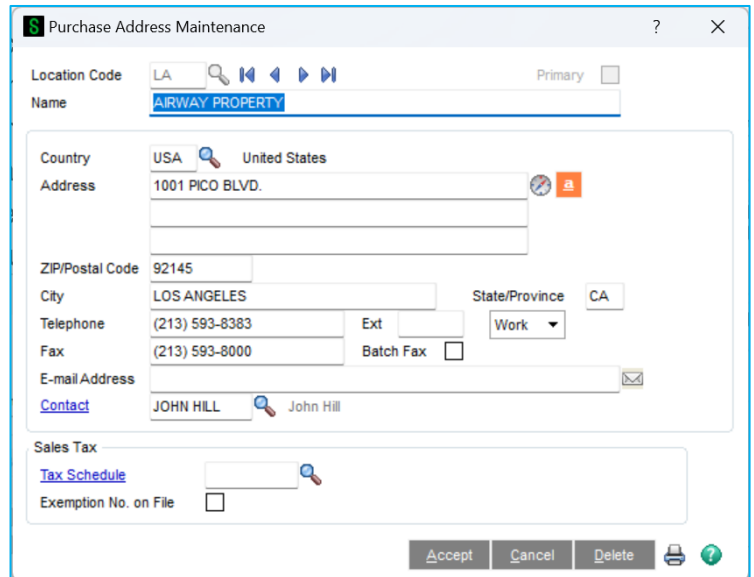
- If the AvaTax Address Validation cannot validate the address due to a **street number not existing for the street name**, then the user will be prompted as follows, and the address will not be updated.
- If the AvaTax Address Validation cannot validate the address due to **one or more address fields missing**, then the user will be prompted as follows, and the address will not be updated.
- If the AvaTax Address Validation cannot validate the address due to **incorrect address, or the address does not exist**, then the user will be prompted as follows, and the address will not be updated.



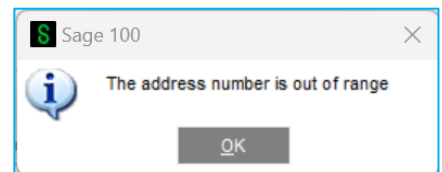
Vendor Maintenance / Purchase Address

A new orange AvaTax Button has been added to the Vendor Maintenance / Ship-To Address Panel, to the right of the Address Line 2 field. Select this button to do an AvaTax Address Validation.

If the address can be properly validated, then the user will receive a message that the address has been successfully validated, and the Vendor Purchase Address will be updated to the Purchase Address Panel. The new address will only be saved to the Location Code if the Accept button is selected. If the Cancel Button is selected, then the original address will be saved. If the “Validate Addresses into UPPERCASE” checkbox in AvaTax Configuration Options has been selected, then the validated address will be updated in upper-case.



- If the AvaTax Address Validation cannot validate the address due to a **street number not existing for the street name**, then the user will be prompted as follows, and the address will not be updated.



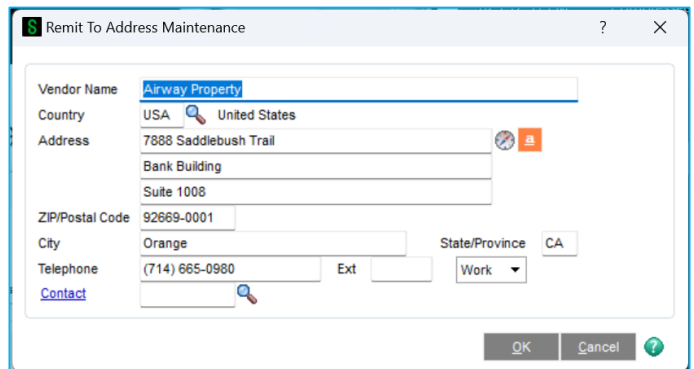
- If the AvaTax Address Validation cannot validate the address due to **one or more address fields missing**, then the user will be prompted as follows, and the address will not be updated.
- If the AvaTax Address Validation cannot validate the address due to **incorrect address, or the address does not exist**, then the user will be prompted as follows, and the address will not be updated.



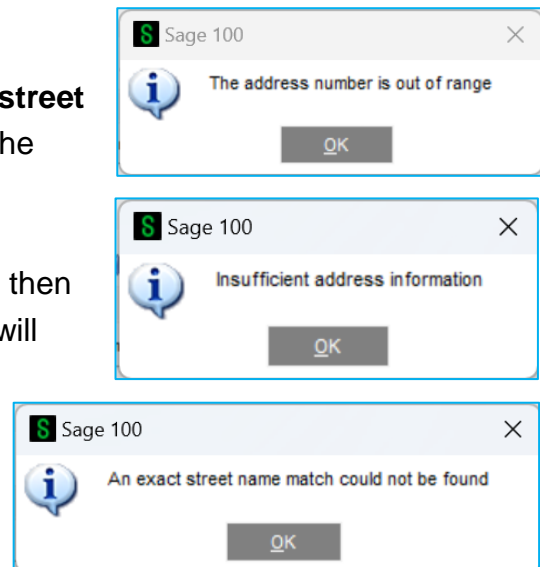
Vendor Maintenance / Remit To Address

A new orange AvaTax Button has been added to the Vendor Maintenance / Remit To Address Panel, to the right of the Address Line 2 field. Select this button to do an AvaTax Address Validation.

If the address can be properly validated, then the user will receive a message that the address has been successfully validated, and the Vendor Remit To Address will be updated to the Remit To Address Panel. The new address will only be saved to the Location Code if the Accept button is selected. If the Cancel Button is selected, then the original address will be saved. If the “Validate Addresses into UPPERCASE” checkbox in AvaTax Configuration Options has been selected, then the validated address will be updated in upper-case.



- If the AvaTax Address Validation cannot validate the address due to a **street number not existing for the street name**, then the user will be prompted as follows, and the address will not be updated.
- If the AvaTax Address Validation cannot validate the address due to **one or more address fields missing**, then the user will be prompted as follows, and the address will not be updated.
- If the AvaTax Address Validation cannot validate the address due to **incorrect address, or the address does not exist**, then the user will be prompted as follows, and the address will not be updated.



Product Line Maintenance

If the “Enable Tax Code Assignments by Item” checkbox has been selected in AvaTax Configuration Options, then a new ‘More’ button drop-down is available in I/M Product Line Maintenance called “Avatax Tax Code”. When you select this option, the AvaTax Tax Code is displayed.

Tax Code: Enter the Tax Code to be used as the line-level Tax Class in data entries, in lieu of TX. These Tax Codes are custom-defined in the AvaTax dashboard for unique.

I/M Item Maintenance

If the “Enable Tax Code Assignments by Item” checkbox has been selected in AvaTax Configuration Options, then a new ‘More’ button drop-down is available in Item Maintenance called “Avatax Tax Code”. When you select this option, the AvaTax Tax Code is displayed.

Tax Code: Enter the Tax Code to be used as the line-level Tax Class in data entries, in lieu of TX. These Tax Codes are custom-defined in the AvaTax dashboard for unique tax rules.

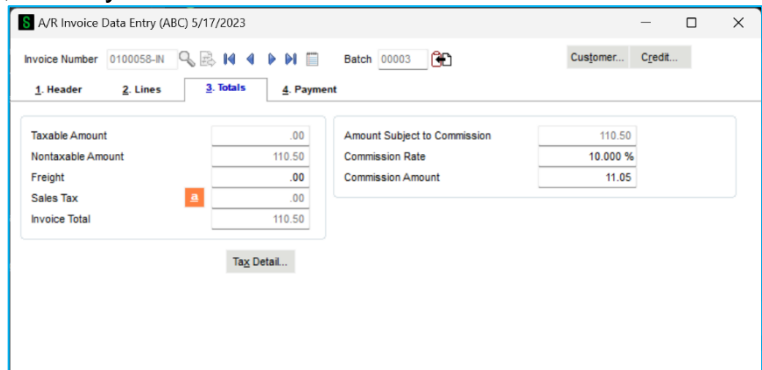
Miscellaneous Item Maintenance

If the “Enable Tax Code Assignments by Item” checkbox has been selected in AvaTax Configuration Options, then a new ‘More’ button drop-down is available in Miscellaneous Item Maintenance called “Avatax Tax Code”. When you select this option, the AvaTax Tax Code is displayed.

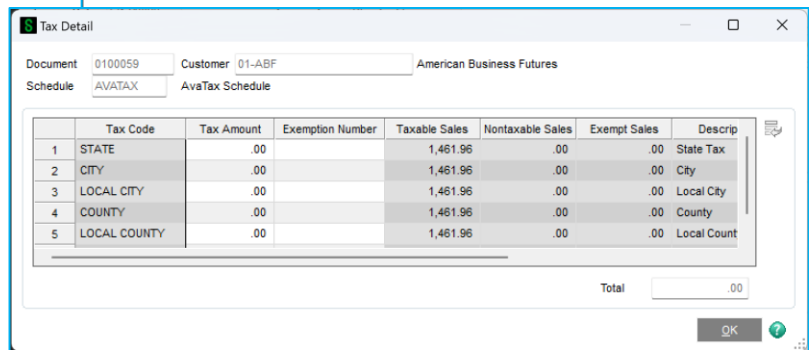
Tax Code: Enter the Tax Code to be used as the line-level Tax Class in data entries, in lieu of TX. These Tax Codes are custom-defined in the AvaTax dashboard for unique tax rules.

A/R Invoice Data Entry

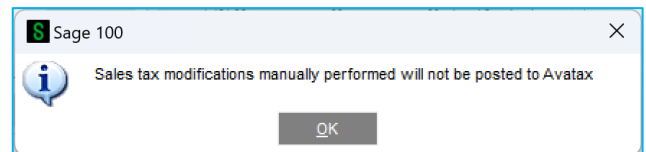
Once the AvaTax Configuration is properly setup, and the AVATAX Tax Schedule has been assigned to a Customer, the **A/R Invoice Data Entry** will be enabled for AvaTax Tax Calculation. When the Sage 100 program calculates Invoice Totals, usually when the user selects the Totals Tab after line entry, the AvaTax Tax Calculation will occur. The Customers address will be used as the Point of Destination, and the Company Address, setup in AvaTax Configuration, will be used as the Point of Origin. After the AvaTax Tax Calculation has been processed, the user can select the Tax Detail Button on the Totals Tab to review the tax calculated for the AvaTax Tax Codes.




If the user changes the Tax Amounts on the Tax Detail Panel, the changes will NOT be updated to the AvaTax Dashboard, and the user will be prompted:

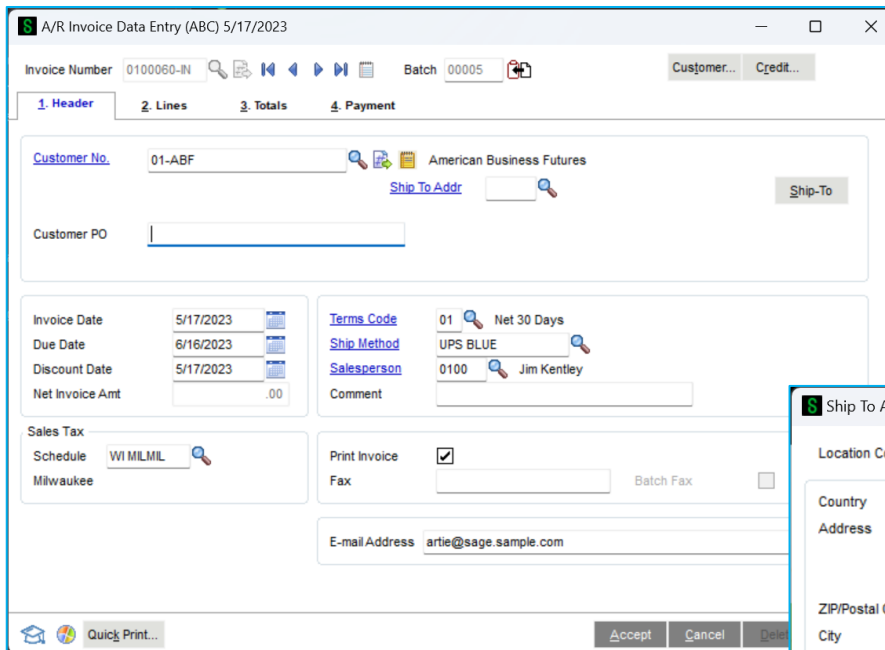


A new orange AvaTax Button has been added to the A/R Invoice Data Entry Totals Panel, to the left of the Sales Tax field. Select this button to do an AvaTax Tax Calculation.



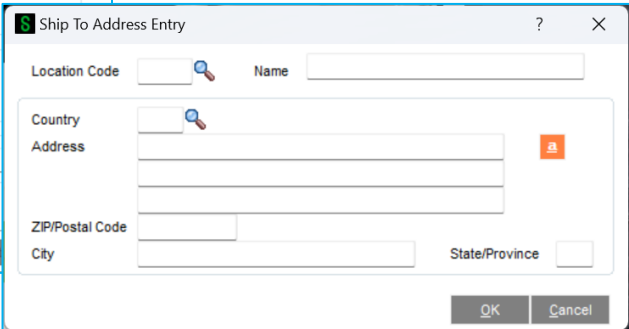
 **Note that AvaTax Tax calculation automatically occurs when any lines or total amounts change, so selecting this button is only required if the invoice tax is needed to be recalculated based on changes to AvaTax Configuration Options.**

If you selected the “Enable A/R Ship To Addresses” feature in AvaTax Configuration Options, a new Ship-To Address field and Ship-To Button will be enabled on the Header Tab in A/R Invoice Data Entry.



Select the Ship-To Code button to access the Ship to Address information.

When this feature is enabled, the Invoice Ship-To Address will be used instead of the Customer Address for the Point of Destination in the AvaTax Tax

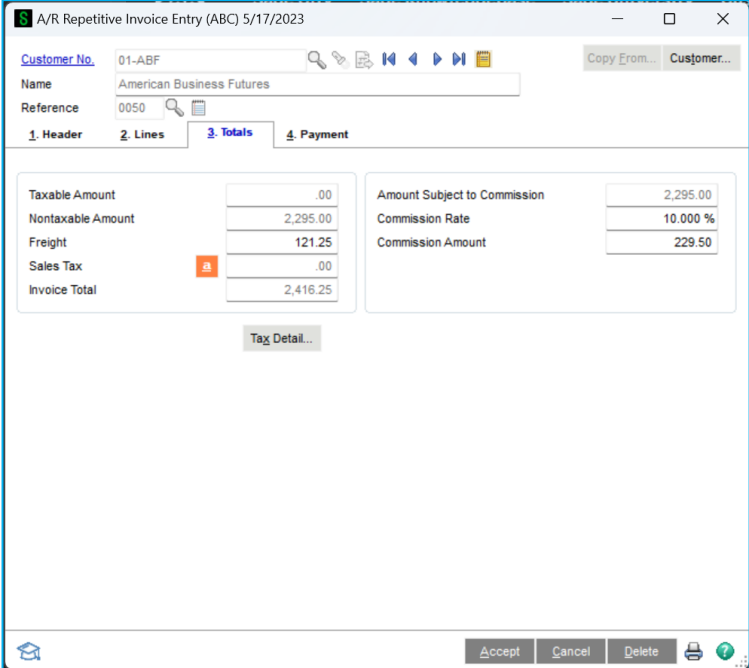


Calculation.

Entity Use Codes: Use Codes can be assigned by Invoice Detail line. Existing Entity Use Codes created in the Avatax Dashboard are available when using the field lookup.

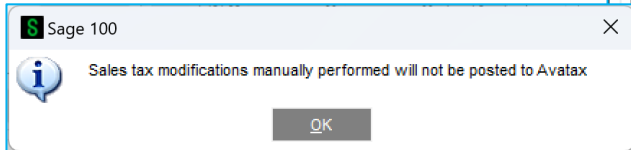
A/R Repetitive Invoice Entry

Once the AvaTax Configuration is properly setup, and the AVATAX Tax Schedule has been assigned to a Customer, the **A/R Repetitive Invoice Entry** will be enabled for AvaTax Tax Calculation. When the Sage 100 program calculates Repetitive Invoice Totals, usually when the user selects the Totals Tab after line entry, the AvaTax Tax Calculation will occur. The Customers address will be used as the Point of Destination, and the Company Address, setup in AvaTax Configuration, will be used as the Point of Origin. After the AvaTax Tax Calculation has been processed, the user can select the Tax Detail Button on the Totals Tab to review the tax calculated for the AvaTax Tax Codes.



If the user changes the Tax Amounts on the Tax Detail Panel, the changes will NOT be updated to the AvaTax Dashboard, and the user will be prompted:

	Tax Code	Tax Amount	Exemption Number	Taxable Sales	Nontaxable Sales	Exempt Sales	Descrip
1	STATE	.00		1,461.96	.00	.00	State Tax
2	CITY	.00		1,461.96	.00	.00	City
3	LOCAL CITY	.00		1,461.96	.00	.00	Local City
4	COUNTY	.00		1,461.96	.00	.00	County
5	LOCAL COUNTY	.00		1,461.96	.00	.00	Local Count
Total							.00



A new orange AvaTax Button has been added to the A/R Repetitive Invoice Entry Totals Panel, to the left of the Sales Tax field. Select this button to do an AvaTax Tax Calculation.



Note that the AvaTax Tax calculation automatically occurs when any lines or total amounts change, so selecting this button is only required if the Repetitive Invoice tax is needed to be recalculated based on changes to AvaTax Configuration Options.

If the “Enable A/R Ship To Addresses” feature in AvaTax Configuration Options is selected, a new

Ship-To Address field and **Ship-To** button will be enabled in on the Header Tab in A/R Repetitive Invoice Data Entry.

Select the **Ship-To** button to access the Ship to Address information.

When this feature is enabled, the Repetitive Invoice Ship-To Address will be used instead of the Customer Address for the Point of Destination in the AvaTax Tax Calculation.

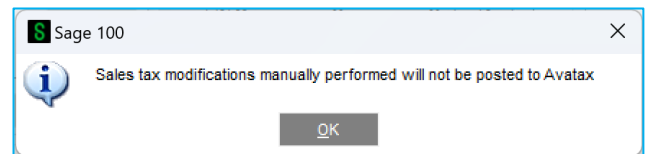
Entity Use Codes: Use Codes can be assigned by Repetitive Invoice Detail line. Existing Entity Use Codes created in the Avatax Dashboard are available when using the field lookup.

S/O Sales Order Entry

Once the AvaTax Configuration is properly setup, and the AVATAX Tax Schedule has been assigned to a Customer and Customer Ship-To, the **S/O Sales Order Entry** will be enabled for AvaTax Tax Calculation. When the Sage 100 program calculates Sales Order Totals, usually when the user selects the Totals Tab after line entry, the AvaTax Tax Calculation will occur. The Order Ship-To address will be used as the Point of Destination, and the line's Warehouse Address, setup in AvaTax Configuration, will be used as the Point of Origin. After the AvaTax Tax Calculation has been processed, the user can select the Tax Detail Button on the Totals Tab to review the tax calculated for the AvaTax Tax Codes.

	Tax Code	Tax Amount	Exemption Number	Taxable Sales	Nontaxable Sales	Exempt Sales	Descrip
1	STATE	.00		1,461.96	.00	.00	State Tax
2	CITY	.00		1,461.96	.00	.00	City
3	LOCAL CITY	.00		1,461.96	.00	.00	Local City
4	COUNTY	.00		1,461.96	.00	.00	County
5	LOCAL COUNTY	.00		1,461.96	.00	.00	Local Count
Total							.00

If the user changes the Tax Amounts on the Tax Detail Panel, the changes will NOT be updated to the AvaTax Dashboard, and the user will be prompted:



A new orange AvaTax Button has been added to the S/O Sales Order Entry Address Panel, to the right of the Zip Code field. Select this button to do an AvaTax Address Validation on the Ship-To Address.

Order Number: 0000181 | Customer: 01-ABF American Business Futures

1. Header | 2. Address | 3. Lines | 4. Totals | 5. Payment

Customer No. 01-ABF American Business Futures

Bill To Address

Name: American Business Futures
 Country: USA United States
 Address: 2131 N. 14th Street Suite 100 Accounting Department
 ZIP/Postal Code: 53205-1204
 City: Milwaukee State/Province: WI

Ship To Address

2 Residential Address
 Name: American Business Futures
 Country: USA United States
 Address: Racine Warehouse 5411 Kendrick Place
 ZIP/Postal Code: 53120
 City: Racine State/Province: WI

Buttons: Print Order, Print Pckg, Recalc Price, Accept, Cancel, Delete

A new orange AvaTax Button has been added to the S/O Sales Order Entry Totals Panel, to the right of the Order Total Tax field. Select this button to do an AvaTax Tax Calculation.



Note that the AvaTax Tax calculation automatically occurs when any lines or total amounts change, so selecting this button is only required if the invoice tax is needed to be recalculated based on changes to AvaTax Configuration Options.

Sales Order Entry (ABC) 5/17/2023

Order Number: 0000181

Order Date: 5/17/2023 | Order Type: Standard Order

Customer No.: 01-ABF | American Business Futures | Salesperson: 0100

Amount Subject to Discount	1,506.60	Deposit Payment Type	NONE
Discount Rate	5.000%	Check Number	
Discount Amount	75.33	Deposit Amount	.00
Taxable Amount	.00	Commission Rate	10.000%
Non-Taxable Amount	1,431.27	Sales Tax Amount	.00 A
Ship Zone		Order Total	1,431.27
Ship Weight	00000		
Freight Amount	.00		

Buttons: Print Order..., Print Pick..., Recalc Price, Accept, Cancel, Delete

Ship-To by Sales Order Detail: If the **Ship-To by Sales Order Detail** checkbox in AvaTax Configuration Options is selected, the Ship-To Code can be entered in the Secondary Grid on the Sales Order Entry Lines Tab, as well as editing the address. The AvaTax Tax Calculation will use this address as the Point of Origin for that line item. If a Ship-To Address Code is NOT selected at the line level, the header Ship-To Address will be used.

Entity Use Codes: Use Codes can be assigned by Sales Order Detail line. Existing Entity Use Codes created in the Avatax Dashboard are available when using the field lookup.

Sales Order Entry (ABC) 5/17/2023

Order Number: 0000181

Item Code	Ordered	Back Ordered	Unit Price	Extension	Comment
1 1001-HON-H254LH	12.00	.00	125.550	1,506.60	
2	.00	.00	.000	.00	

Ship To Code: []

Ship To Name: []

Ship To Addr 1: []

Ship To Addr 2: []

Ship To Addr 3: []

Ship To City: []

Ship To State: []

Ship To Zip Code: []

Ship To Country: []

Entity Use Code: []

Total Amount: 1,506.60

Buttons: Print Order..., Print Pick..., Recalc Price, Accept, Cancel, Delete

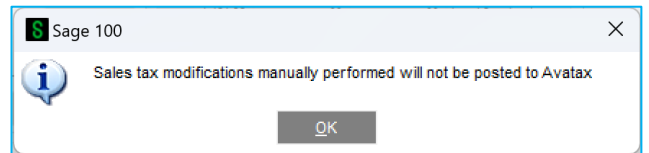
S/O Invoice Data Entry

Once the AvaTax Configuration is properly setup, and the AVATAX Tax Schedule has been assigned to a Customer and Customer Ship-To, the **S/O Invoice Data Entry** will be enabled for AvaTax Tax Calculation. When the Sage 100 program calculates Invoice Totals, usually when the user selects

the Totals Tab after line entry, the AvaTax Tax Calculation will occur. The Invoice Ship-To address will be used as the Point of Destination, and the line's Warehouse Address, setup in AvaTax Configuration, will be used as the Point of Origin. After the AvaTax Tax Calculation has been processed, the user can select the Tax Detail Button on the Totals Tab to review the tax calculated for the AvaTax Tax Codes.

	Tax Code	Tax Amount	Exemption Number	Taxable Sales	Nontaxable Sales	Exempt Sales	Descrip
1	STATE	.00		1,461.96	.00	.00	State Tax
2	CITY	.00		1,461.96	.00	.00	City
3	LOCAL CITY	.00		1,461.96	.00	.00	Local City
4	COUNTY	.00		1,461.96	.00	.00	County
5	LOCAL COUNTY	.00		1,461.96	.00	.00	Local Count
Total							.00

If the user changes the Tax Amounts on the Tax Detail Panel, the changes will NOT be updated to the AvaTax Dashboard, and the user will be prompted:



A new orange AvaTax Button has been added to the S/O Invoice Data Entry Address Panel, to the right of the Zip Code field. Select this button to do an AvaTax Address Validation on the Ship-To Address.

Invoice No. 0100058 | Customer: American Business Futures

1. Header | 2. Address | 3. Lines | 4. Totals | 5. Payment

Customer No. 01-ABF | American Business Futures | Copy Ship To

Bill To Address


Name: American Business Futures
 Country: USA | United States
 Address: 2131 N. 14th Street | Suite 100 | Accounting Department
 ZIP/Postal Code: 53205-1204
 City: Milwaukee | State/Province: WI

Ship To Address

Ship To: 2
 Name: American Business Futures
 Country: USA | United States
 Address: Racine Warehouse | 5411 Kendrick Place
 ZIP/Postal Code: 53120
 City: Racine | State/Province: WI

Buttons: Quick Print... | Accept | Cancel | Delete

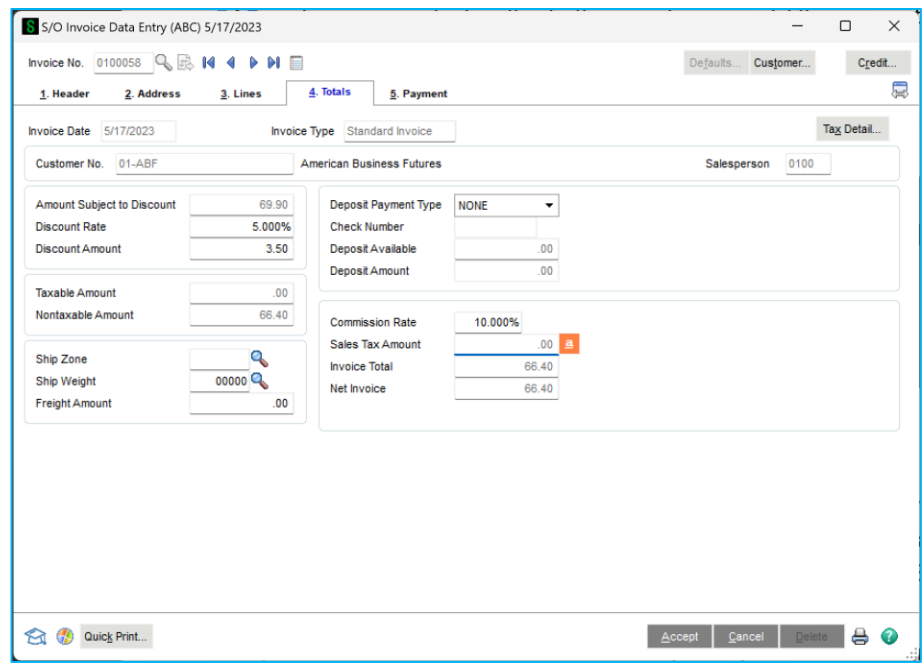
A new orange AvaTax Button has been added to the S/O Invoice Data Entry Totals Panel, to the right of the Order Total Tax field. Select this button to do an AvaTax Tax Calculation.

 Note that the AvaTax Tax calculation automatically occurs when any lines or total amounts change, so selecting this button is only required if the invoice tax is needed to be recalculated based on changes to AvaTax Configuration Options.

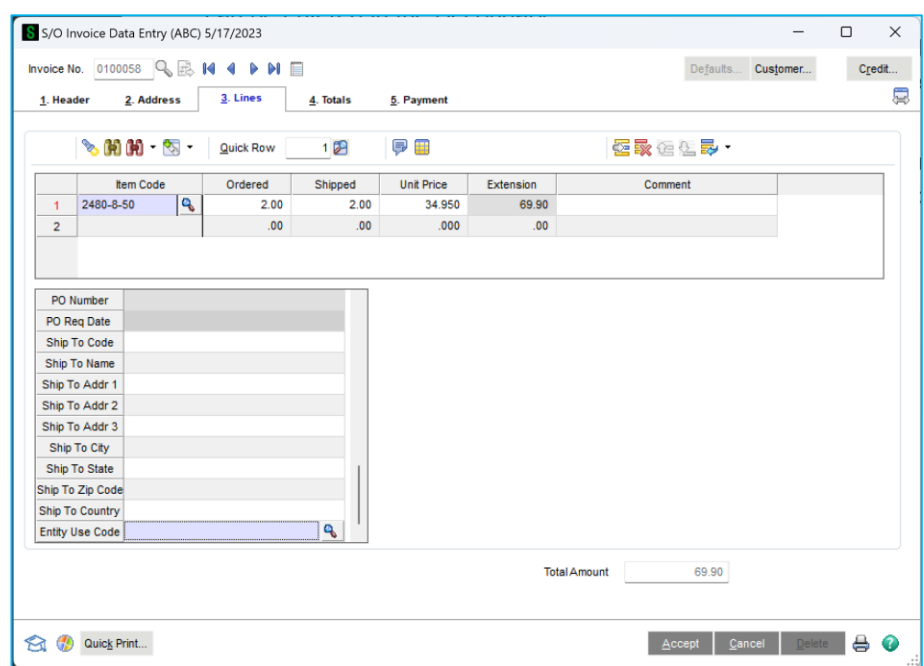
Ship-To by Sales Order Detail:

If the **Ship-To by Sales Order Detail** checkbox in AvaTax Configuration Options was selected, then a Ship-To Code can be entered in the Secondary Grid on the S/O Invoice Data Entry Lines Tab, as well as editing the address. The AvaTax Tax Calculation will use this address as the Point of Origin for that line item. If a Ship-To Address Code is NOT selected at the line level, the header Ship-To Address will be used.

Entity Use Codes: Use Codes can be assigned by Invoice Detail line. Existing Entity Use Codes created in the Avatax Dashboard are available when using the field lookup.



The screenshot shows the 'Totals' tab of the S/O Invoice Data Entry window. The 'Sales Tax Amount' field is highlighted with an orange button, indicating the AvaTax calculation function. Other fields include Invoice No. 0100058, Invoice Date 5/17/2023, Customer No. 01-ABF, and various tax and discount amounts.



The screenshot shows the 'Lines' tab of the S/O Invoice Data Entry window. It features a table with columns for Item Code, Ordered, Shipped, Unit Price, Extension, and Comment. Below the table is a field lookup for 'Entity Use Code' with a search icon.

Item Code	Ordered	Shipped	Unit Price	Extension	Comment
1 2480-8-50	2.00	2.00	34.950	69.90	
2	.00	.00	.000	.00	

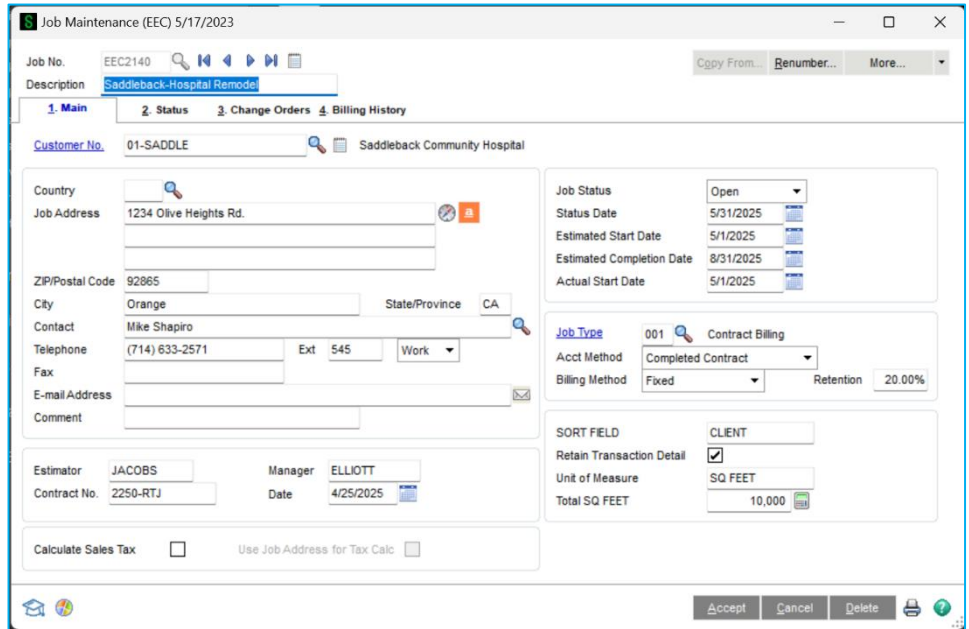
Job Cost Job Maintenance

A new orange AvaTax Button has been added to the Job Maintenance / Main Panel, to the right of the Address Line 2 field. Select this button to do an AvaTax Address Validation.

Two new fields have also been added at the bottom of the Main Tab:

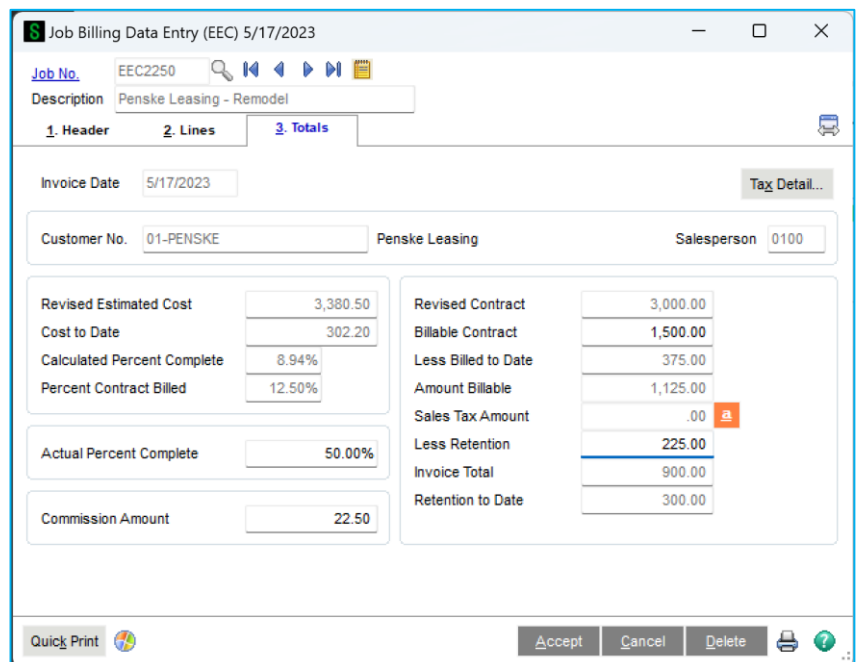
Calculate Sales Tax: Select this checkbox to enable AvaTax Tax Calculation in Job Billing Data Entry.

Use Job Address for Tax Calc: Select this checkbox to allow the Job Address to be used as the Point of Destination for AvaTax Tax Calculation in Job Billing Data Entry. Clear this checkbox to use the Customer Address instead.

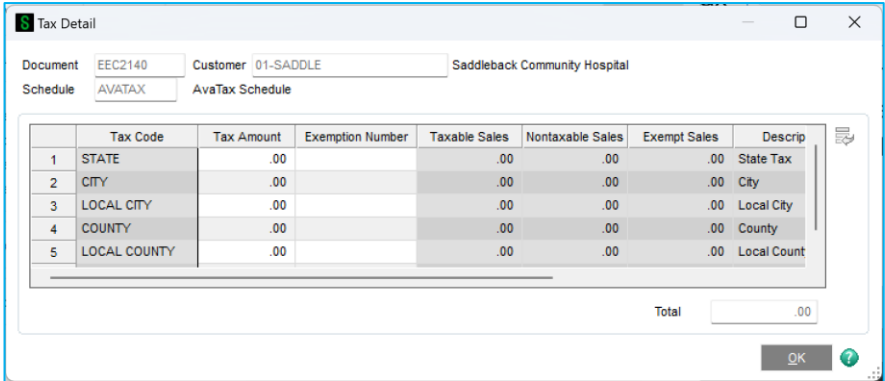


Job Cost Billing Data Entry

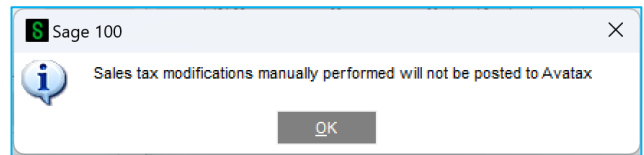
Once the AvaTax Configuration is properly setup, and the AVATAX Tax Schedule has been assigned to a Customer and/or Job, the **Job Cost Billing Data Entry** will be enabled for AvaTax Tax Calculation. When the Sage 100 program calculates Invoice Totals, usually when the user selects the Totals Tab after line entry, the AvaTax Tax Calculation will occur. The Customer or Job Address will be used as the Point of Destination, and the Company Address, setup in AvaTax Configuration, will be used as



the Point of Origin. After the AvaTax Tax Calculation has been processed, the user can select the Tax Detail Button on the Totals Tab to review the tax calculated for the AvaTax Tax Codes.



If the user changes the Tax Amounts on the Tax Detail Panel, the changes will NOT be updated to the AvaTax Dashboard, and the user will be prompted:



A new orange AvaTax Button has been added to the Job Billing Data Totals Panel, to the right of the Sales Tax Amount field. Select this button to do an AvaTax Tax Calculation.



Note that the AvaTax Tax calculation automatically occurs when any lines or total amounts change, so selecting this button is only required if the invoice tax is needed to be recalculated based on changes to AvaTax Configuration Options.

Custom Office features:

- **Tables:** Sales Order Header, SO Invoice Header
- **Field Name:** UDF_AvataxTaxRate, Numeric

This UDF enables the capture and storage of the total Avatax Tax Rate as calculated for all tax jurisdictions during S/O Sales Order and Invoice Data Entry.

- **Table:** AR Customer
- **Field Name:** UDF_AVA_CUST_TYPE, String

This UDF allows the assignment by customer, the Customer Usage Type, or Entity Use Code.

This UDF value is derived from the customer record during data entry and passed to the Avatax tax service to allow for special exemptions.

Section E: Troubleshooting

Refer to the following instructions to address common issues encountered using AvaTax.

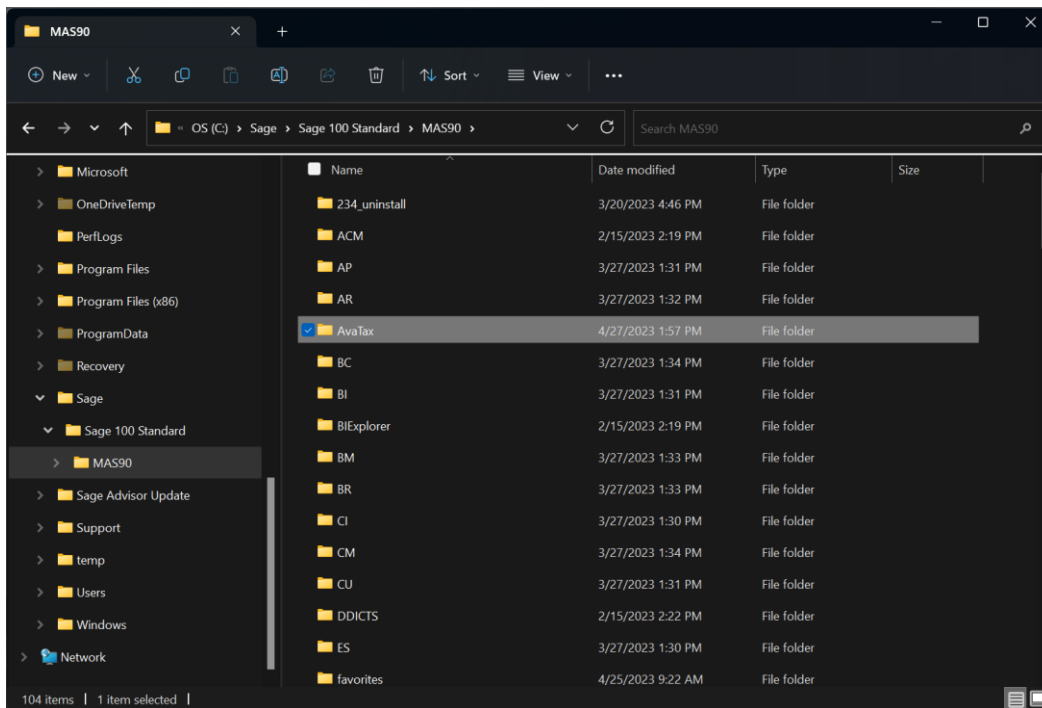
Avalara Knowledge Center

See the following page on the Avalara website for more information on how to troubleshoot issues.

[Avalara Knowledge Center](#)

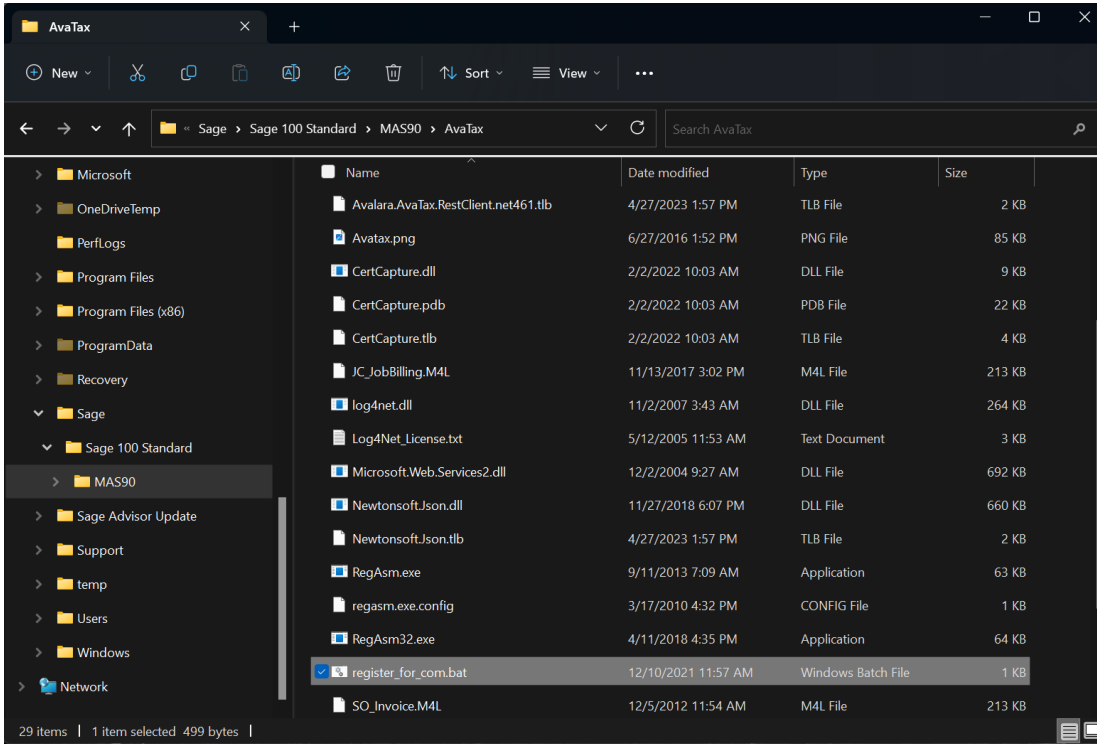
Register the Avalara DLLs

This step isn't necessary for Sage 100 Client/Server architecture (formerly Advanced or Premium versions). AvaTax runs on the Server and is configured during installation. For Sage 100 Standard versions, the AvaTax DLLs need to be manually registered on each workstation. To manually register the file, locate and copy the AvaTax folder from the MAS90 directory to the local workstation.



1. Locate and copy the **AvaTax** folder in the Sage 100 folder.
2. Copy the folder to the root-level of the drive on each workstation.

- Open the **AvaTax** folder on each workstation, and then double-click **register_for_com.bat** file.



- Note: This must be run with full Window's Administrator rights.

Section F: Data Dictionary Changes

Accounts Receivable Module

AR_InvoiceDetail

- AVA234_EntityUseCode

AR_InvoiceHeader

- ShipToCode
- ShipToName
- ShipToAddress1
- ShipToAddress2
- ShipToAddress3
- ShipToCity
- ShipToState
- ShipToZipCode
- ShipToCountryCode

AR_InvoiceHistoryDetail

- AVA234_ShipToCode
- AVA234_ShipToName
- AVA234_ShipToAddress1
- AVA234_ShipToAddress2
- AVA234_ShipToAddress3
- AVA234_ShipToCity
- AVA234_ShipToState
- AVA234_ShipToZipCode
- AVA234_ShipToCountryCode
- AVA234_EntityUseCode

AR_InvoiceWrk

- ShipToCode
- ShipToName
- ShipToAddress1
- ShipToAddress2
- ShipToAddress3
- ShipToCity
- ShipToState
- ShipToZipCode
- ShipToCountryCode

AR_RepetitiveInvoiceDetail

- AVA234_EntityUseCode

AR_RepetitiveInvoiceHeader

- ShipToCode
- ShipToName
- ShipToAddress1
- ShipToAddress2
- ShipToAddress3
- ShipToCity
- ShipToState
- ShipToZipCode
- ShipToCountryCode

AR_RepetitiveInvoiceListingWrk

- ShipToCode
- ShipToName
- ShipToAddress1
- ShipToAddress2
- ShipToAddress3
- ShipToCity
- ShipToState
- ShipToZipCode
- ShipToCountryCode

AR_ShipToAddress (new file)

- ARDivisionNo
- CustomerNo
- ShipToCode
- ShipToName
- ShipToAddress1
- ShipToAddress2
- ShipToAddress3
- ShipToCity
- ShipToState
- ShipToZipCode
- ShipToCountryCode
- TelephoneNo
- TelephoneExt
- FaxNo
- BatchFax
- BatchEmail
- EmailAddress
- ContactCode
- SalespersonDivisionNo
- SalespersonNo
- ShipVia
- WarehouseCode
- TaxSchedule

- ResidentialAddress
- AVA234_EntityUseCode

AR_ShipToAddressListingWrk (new file)

- SortField
- ARDivisionNo
- CustomerNo
- ARDivisionNo
- CustomerNo
- ShipToCode
- ShipToName
- ShipToAddress1
- ShipToAddress2
- ShipToAddress3
- ShipToCity
- ShipToState
- ShipToZipCode
- ShipToCountryCode
- TelephoneNo
- TelephoneExt
- FaxNo
- BatchFax
- BatchEmail
- EmailAddress
- ContactCode
- SalespersonDivisionNo
- SalespersonNo
- ShipVia
- WarehouseCode
- TaxSchedule
- ResidentialAddress
- CRMAddressID
- CRMAddress1
- PrimaryShipTo
- AVA234_EntityUseCode

AR234_AVA_UseCode (new file)

- AVA234_EntityUseCode

Common Information Module

CI_Item

- TaxCode_234

CI_MiscellaneousItemListingWrk

- TaxCode_234

Inventory Management Module

IM_ItemListingWithSalesHistWrk

- TaxCode_234

IM_ItemListingWrk

- TaxCode_234

IM_ProductLine

- TaxCode_234

IM_ProductLineListingWrk

- TaxCode_234

Job Cost Module

JC_Job

- AVA234_UseJobAddressForTaxCalc

Sales Order Module

SO_InvoiceDetail

- AVA234_ShipToCode
- AVA234_ShipToName
- AVA234_ShipToAddress1
- AVA234_ShipToAddress2
- AVA234_ShipToAddress3
- AVA234_ShipToCity
- AVA234_ShipToState
- AVA234_ShipToZipCode
- AVA234_ShipToCountryCode
- AVA234_EntityUseCode

SO_ShipToAddress

- AVA234_EntityUseCode

SO_ShipToAddressListingWrk

- AVA234_EntityUseCode

SO_SalesOrderDetail

- AVA234_ShipToCode
- AVA234_ShipToName
- AVA234_ShipToAddress1
- AVA234_ShipToAddress2
- AVA234_ShipToAddress3
- AVA234_ShipToCity
- AVA234_ShipToState
- AVA234_ShipToZipCode
- AVA234_ShipToCountryCode
- AVA234_EntityUseCode

Section G: Release Notes

The following is a list of corrections and selected enhancements that have been added to AvaTax Connector to Sage 100.

April 20, 2021

- The AvaTax Connector has been updated to support CertCapture.
- Avatax Configuration Options has been modified to include multiple options to support CertCapture.
- A Customer Batch Update utility has been added to the Utilities menu in A/R. This utility will update all selected customer records to the CertCapture database.
- Customer Maintenance has been updated to maintain and display CertCapture records.

December 9, 2019

- Avatax Configuration Options has been modified to include a new option: Validate Addresses in Data Entry. This option enables address validations to occur during data entry if the checkbox is selected.
- Functionality has been added to allow a user created Sales Order Header UDF to capture and store the total Avatax Tax Rate as calculated for all jurisdictions. This is particularly useful for Starship integrations.

August 27, 2019

Sales Order

- Sales Tax calculation error message trapping has been improved for Sales Order Entry, Invoice Entry, and the Sales Journal process.
- Entity Use Codes can now be assigned at the document line level
- Ship-To Address Maintenance has been modified to allow default Entity Use Code assignments.
- Sales Order and Invoice Entry have been modified to include a warning when a document's tax detail is modified
- The Ship-To Address document Line Detail file dictionary field names have been renamed to eliminate potential errors during BOI access.

Accounts Receivable

- Sale Tax calculation error message trapping has been improved for Invoice Entry, and the Sales Journal process.

- Entity Use Codes can now be assigned at the document line level
- Ship-To Address Maintenance has been modified to allow default Entity Use Code assignments.
- Invoice “Adjustments” can now be performed in Invoice Data Entry
- Invoice Entry has been modified to include a warning when a document’s tax detail is modified

Inventory Management

- Tax Code Assignments can now be defined by Item Code and/or Product Line

Job Cost

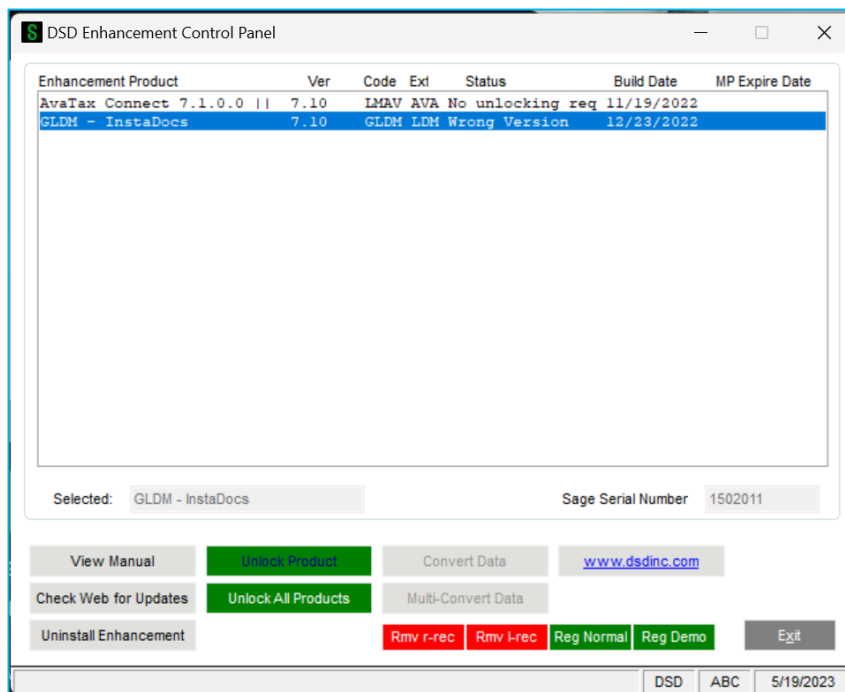
- Job Addresses can now be used for sales tax calculations as performed in Job Billing Entry.
- Job Address validations can now be performed in Job Maintenance

General

- Address/Location validation changes:
- Three-character Country Codes are now permitted. Two-character Country codes are no longer required by AvaTax but can still be used as needed.

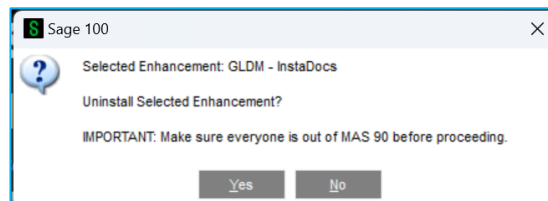
Section H: Uninstall DSD Enhancements

A DSD Enhancements Uninstall Utility has been provided for the purposes of removing DSD Enhancements from your Sage 100 System. This utility may be accessed from the **DSD Enhancement Control Panel** menu option on the **Library Master / Utilities** menu.



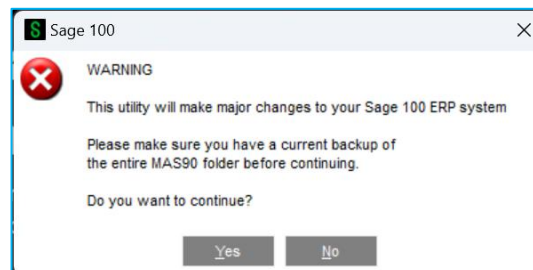
When accessing the **DSD Enhancement Control**, select the enhancement that you wish to Uninstall, and then select the **Uninstall Enhancement** button. The following message box will appear:

- Select **No** to exit the Uninstall Process.
- Select **Yes** to continue with the Uninstall Process.



The following message box will appear, to remind you that a complete backup of your entire Sage 100 system should be completed prior to uninstalling a DSD product.

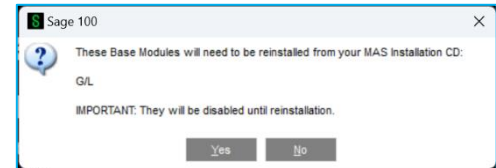
- Select **No** to exit the Uninstall Process.
- Select **Yes** to continue with the Uninstall Process.



After the Uninstall of the DSD Enhancement, you MUST reinstall certain standard Sage 100 modules, followed by reinstallation of Product Updates and Hot Fixes, if applicable.

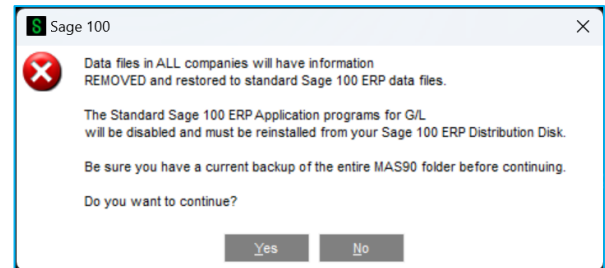
A message box will appear, and will display which of those specific Sage 100 modules you must reinstall afterwards.

- Select **No** to exit the Uninstall Process.
- Select **Yes** to continue with the Uninstall Process.

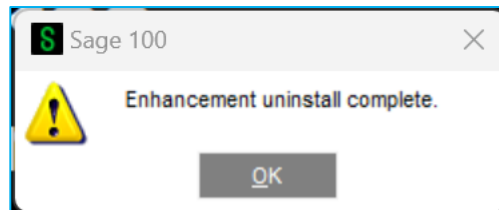


The following message box will appear, displaying the final warning message.

- Select **No** to exit the Uninstall Process.
- Select **Yes** to continue with the Uninstall Process. At this point, the DSD Enhancement will be removed from the Sage 100 system.



After completion of the Uninstall, the following message box will appear. Select OK to continue.



Now that the Uninstall process is completed, you must:

- Reinstall the applicable standard Sage 100 modules
- Reinstall the latest Sage 100 Service Pack/Updates, if applicable.
- Reinstall any other DSD Enhancements or Developer products that are affected from the reinstallation of the standard Sage 100 module(s).

Section I: Resources and Support

Web Resources

DSD web site: <http://www.dsdinc.com>

Avalara Website: <http://www.avalara.com>

The Enhancement page contains:

- Current Release Schedule
- Purchasing Information
- Installation Instructions
- Product Support
- Enhancement Links

LMAV AvaTax Connector:

<https://www.dsdinc.com/enhancements/marketplace/products/lmav-avatax-connector-for-sage-100>

The product web page contains:

- Product Description
- Web Links
- Current Product Version Table
- Product Installation File Download
- Product Manual in .pdf Format

Support

Please contact Avalara for all support related to this AvaTax Connector to Sage 100. Avalara's partner support number is **877-826-4383**.




Since 1984, DSD Business Systems has been providing clients with professional business consulting services and business software solutions across the globe. Specialties include Sage Intacct, Acumatica Cloud ERP, Sage 100, Sage 300, Sage 500, Sage CRM, Sage HRMS and more.

DSD Business Systems has been a Sage Development Partner, commonly referred to as a “Master Developer”, for over 30 years. DSD currently has over 500 Enhancements to Sage 100 and has created thousands of custom solutions for end-users around the world. We have had the privilege of working with hundreds of Sage consultants, resellers, and end-users to produce powerful custom solutions

Contact DSD Enhancements

 enhancements@dsdinc.com

 [Enhancements Marketplace](#)

 **800-627-9032**