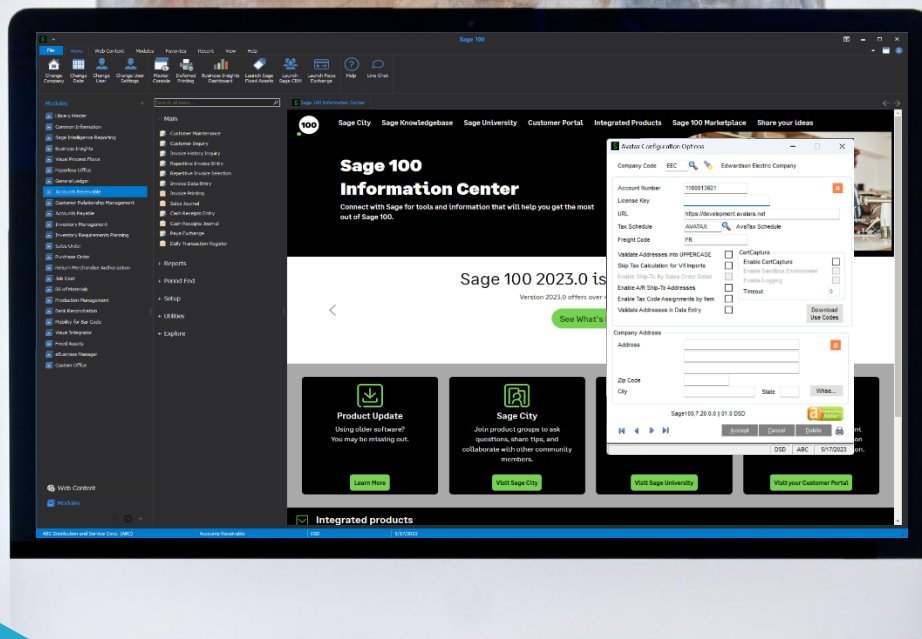


# Sage



**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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DSD Business Systems  
8787 Complex Drive  
Suite 400  
San Diego, CA 92123  
858-550-5900 8:00am to 5:00pm PST  
858-550-4900 Fax

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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 ECM (formally 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.

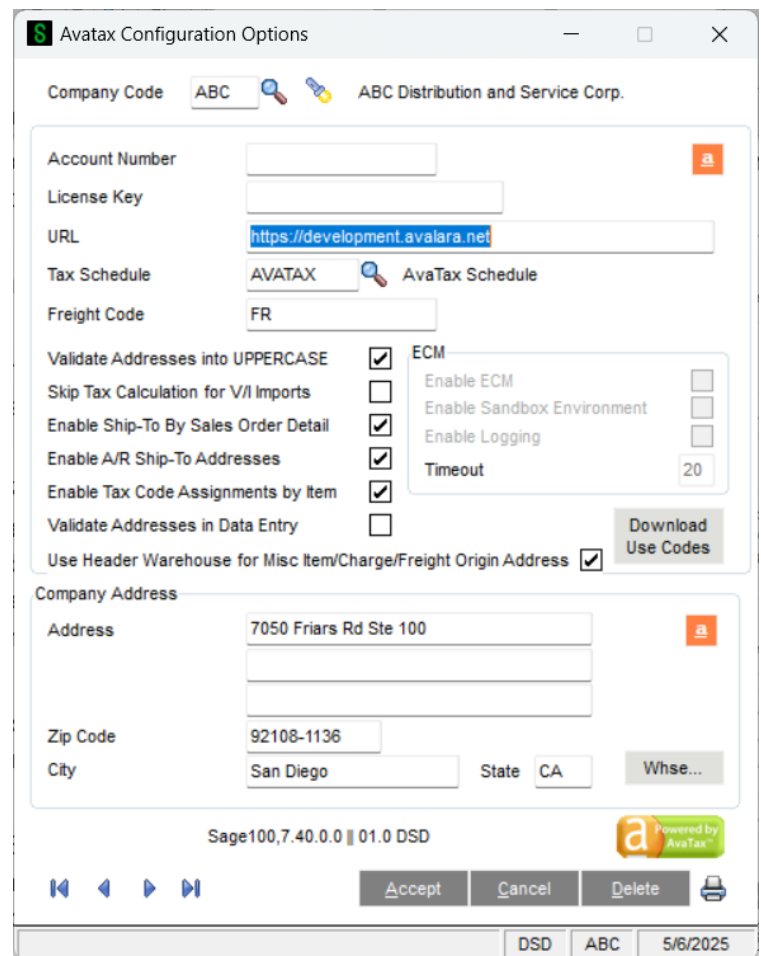
**License Key:** Enter the License Key assigned by Avalara. Please contact Avalara to get this setting.

**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 Data 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 ECM (Version 2021 and above):** Select this checkbox option to enable ECM (formally referred to as CertCapture) functionality for Avatax.

**Enable Sandbox Environment:** Select this checkbox option to enable ECM 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 ECM transactions to and from Sage 100 and ECM. 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 ECM. 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.

The screenshot shows the 'Avatax Configuration Warehouse Code Maintenance' window. It contains the following fields and controls:

- Company Code:** ABC
- Warehouse Code:** 000 (with a magnifying glass icon for lookup)
- Description:** CENTRAL WAREHOUSE
- Address:** 14711 Via Bettona Ste 100 (with an orange AvaTax button to the right)
- Zip Code:** 92127-3817
- City:** San Diego
- State:** CA
- Navigation:** A set of small arrows for navigating between records.
- Buttons:** Accept, Cancel, and Delete.
- Status Bar:** DSD, ABC, 5/17/2023

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.

Comp Code	Account Value	End User License Key	URL	Schedule
ABC	1100012146	5FA76DF186E29745	https://development.avalara.net	AVATAX
EEC	1100013921	586CBA56AD54310	https://development.avalara.net	AVATAX

## 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.

	Tax Code	Description
1	STATE	State Tax (Primary)
2	CITY	City
3	LOCAL CITY	Local City
4	COUNTY	County
5	LOCAL COUNTY	Local County
6	SPECIAL	Special Tax
7		

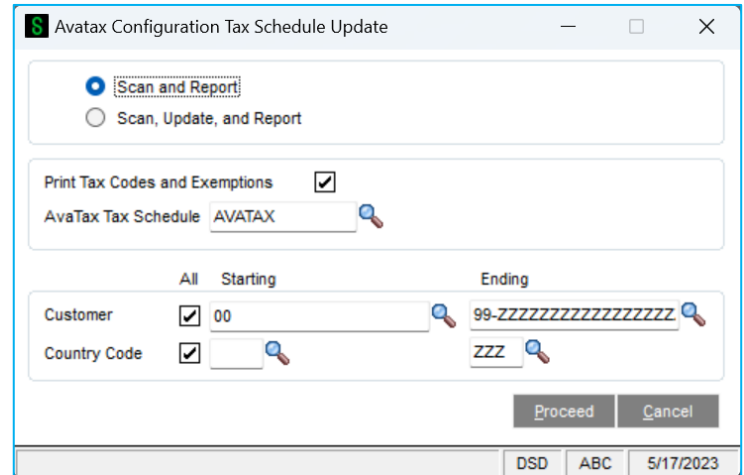
## AvaTax Configuration Tax Schedule Update

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

This utility allows existing Customer and Customer Ship-To Code Tax Schedules to be batch-updated with the “AVATAX” Tax Schedule.

**Scan and Report:** Select this option to only scan the Customer and Country Code range of records and report which customers will be changed to have the AVATAX Tax Schedule.

**Scan, Update, and Report:** Select this option to scan the Customer and Country Code range of records, report which customers will be changed to have the AVATAX Tax Schedule, and do the actual update of the Customer and Customer Ship-To records.




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

**Print Tax Codes and Exemptions:** Select this option to print the Tax Codes for the Tax Schedule that is currently assigned, including Exemptions assigned to each Tax Code.

**AvaTax Tax Schedule:** Enter the new Tax Schedule to replace the Tax Schedule that is currently assigned. The default is “AVATAX” Tax Schedule, and it is recommended that this default be used.

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

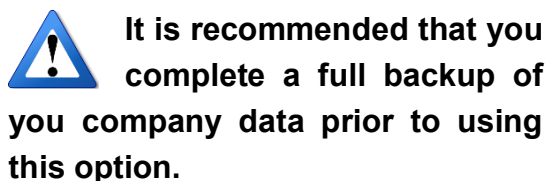
**Country Code selection range:** Select the country code range to report/update.

The **AvaTax Configuration Address Tax Schedule Update Log** will show the Customer and Customer Ship-To records selected, along with the Old Tax Schedule and associated Tax Codes and Exemption Numbers. If the **Scan, Update, and Report** option was selected, then the utility will automatically replace the Tax Schedule with the new AvaTax Tax Schedule, and any associated Exemption Number will be moved to all AvaTax Tax Codes IF the Exemption Number was the same for all Tax Codes on the Old Tax Schedule. If an Exception occurs, it will be show on the Log File, and the record will NOT be update with the new Tax Schedule. An Exception is triggered when the Exception Numbers are not the same for each Tax Code on the Old Tax Schedule.

## AvaTax Configuration Address Validation

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, 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.

Page | 14

**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.

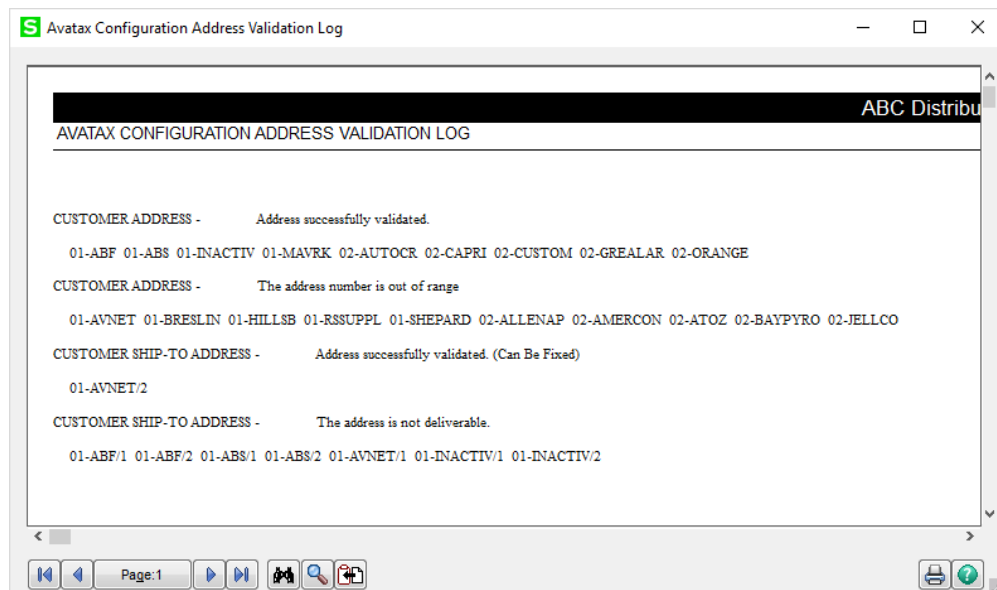
**Vendor Addresses:** Select this option to scan/report/update the Vendor records.

**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.



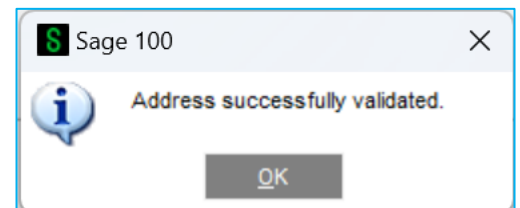


## Section D: System Operations

### Customer Maintenance

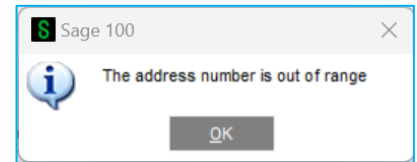
A new orange AvaTax Button has been added to the Customer Maintenance / Main Panel, to the right of the Address Line 2 field. Select this button to do an AvaTax Address Validation.

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.

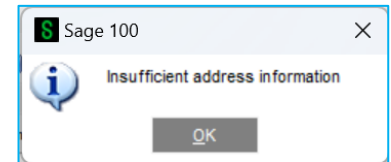




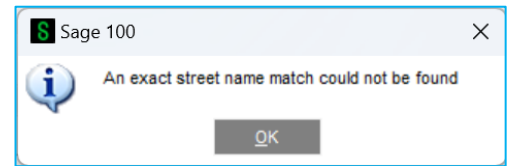
If the AvaTax Address Validation cannot validate the address due to a **street number not existing for the street name**, then the user will be prompted as follows, and the address will not be updated.



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.



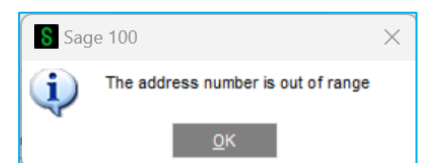
## Customer Maintenance / Ship-To Address

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.

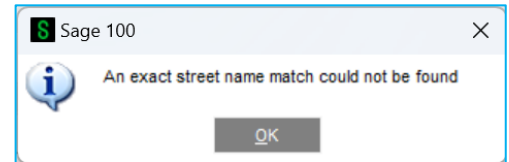
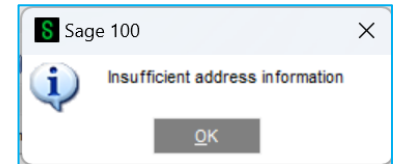
If the address can be properly validated, then the user will receive a message that the address has been successfully validated, and the Customer Ship-To Address will be updated to the Ship-To Address Panel. The new address will only be saved to the Ship-To Code if the Accept button is selected. If the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

 A screenshot of the "Customer Ship-To Address Maintenance" window. It contains various fields for address information: Location Code (1), Name (American Business Futures), Country (USA), Address (Distribution Warehouse, 3121 W. 24th Street), ZIP/Postal Code (53146), City (Milwaukee), State/Province (WI), Telephone ((414) 555-4311), Fax, E-mail Address, Contact (ARTE JOHN), Warehouse (0100), Salesperson (Jim Kentley), Ship Via (UPS BLUE), Entity Use Code, and Sales Tax (WI MILMIL). There is an orange AvaTax button next to the address line 2 field. At the bottom, there are buttons for Accept, Cancel, and Delete.

- If the AvaTax Address Validation cannot validated 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 / ECM Version 2021 & above)

A new "ECM" 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 ECM.



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

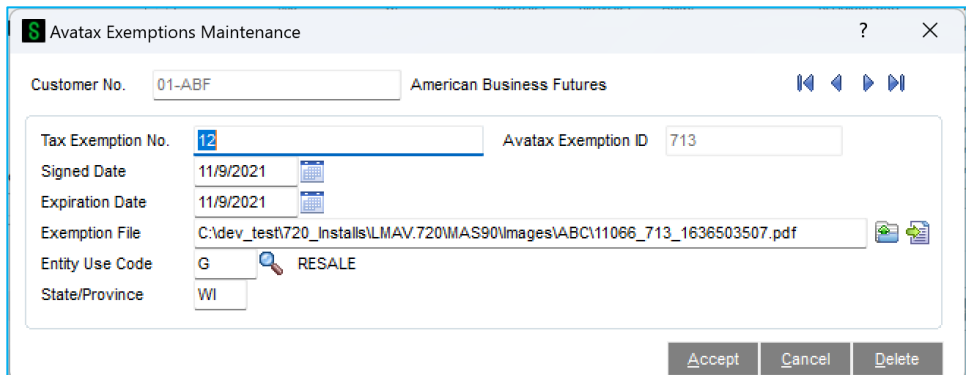
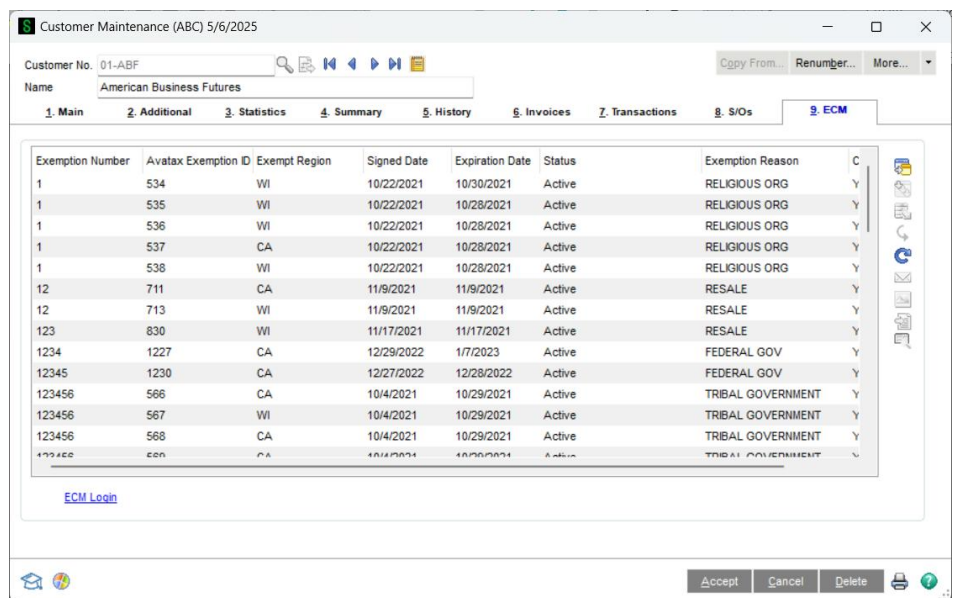
Buttons have been added to the screen to allow the following tasks:

### 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 ECM 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 ECM

- Tax Exemptions created in Avatax Exemption Maintenance will be uploaded to ECM
- 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 ECM dashboard.

### 4. Revoke Exemption in ECM

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

### 5. Refresh Exemptions

- This task will perform a bidirectional synchronization between Sage 100 and ECM exemption certificates.
  - Tax exemptions created in Sage will be uploaded to ECM
  - Tax exemptions created in the ECM 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 ECM (PDF)

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

### 8. Upload Exemption Certificate Image to ECM (PDF)

- This task will perform an upload to ECM 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 ECM 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 ECM 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 ECM, the exemption credentials assigned in ECM 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 ECM”
- This utility allows a batch update of customers and their associated exemption certificates from Sage 100 to ECM. (there is no download from ECM to Sage 100 with this utility).

Select Field	Operand	Value
Customer Number	All	

Proceed Cancel

## 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**

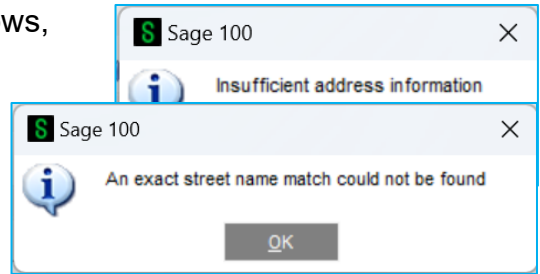
Sage 100

The address number is out of range

OK

**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.

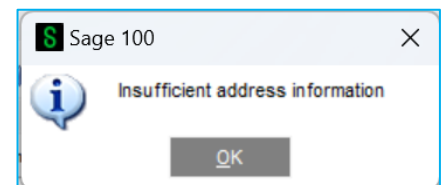
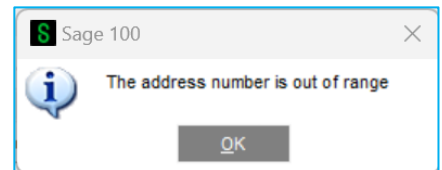


## Vendor Maintenance / Purchase Address

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.

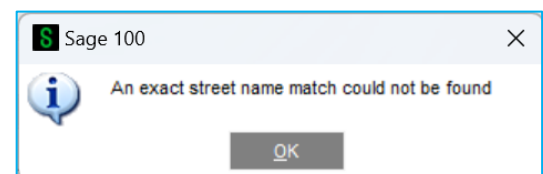
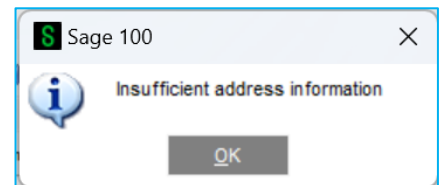
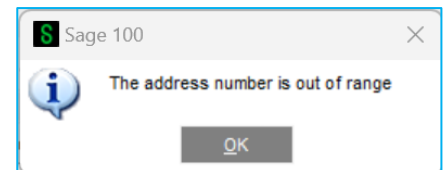


## Vendor Maintenance / Remit To Address

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.

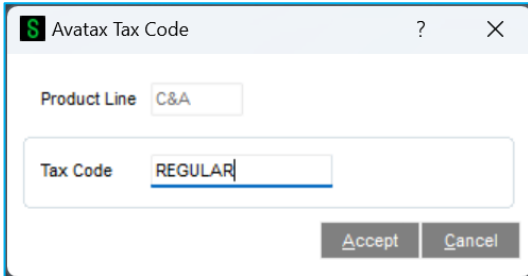
- If the AvaTax Address Validation cannot validate the address due to a **street number not existing for the street name**, then the user will be prompted as follows, and the address will not be updated.
- If the AvaTax Address Validation cannot validate the address due to **one or more address fields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

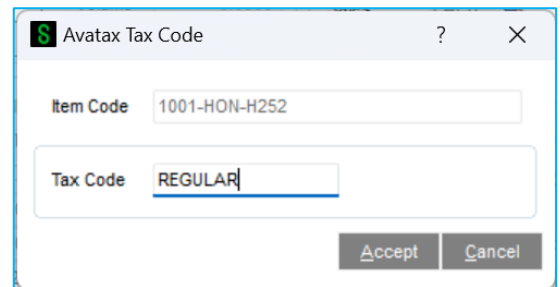


**Tax Code:** Enter the Tax Code to be used as the line-level Tax Class in data entries, in lieu of TX. These Tax Codes are custom-defined in the AvaTax dashboard for unique.

## 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.

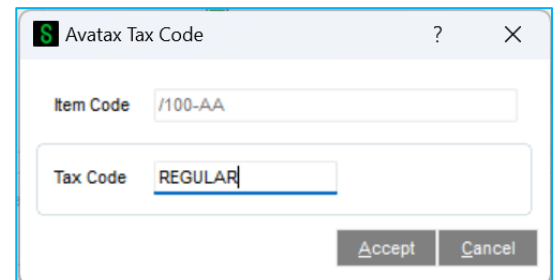
**Tax Code:** Enter the Tax Code to be used as the line-level Tax Class in data entries, in lieu of TX. These Tax Codes are custom-defined in the AvaTax dashboard for unique tax rules.



## 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.

A/R Invoice Data Entry (ABC) 5/17/2023

Invoice Number: 0100058-84 Batch: 00003 Customer: Credit...

1. Header 2. Lines 3. Totals 4. Payment

Taxable Amount	.00	Amount Subject to Commission	110.50
Nontaxable Amount	110.50	Commission Rate	10.000 %
Freight	.00	Commission Amount	11.05
Sales Tax	.00		
Invoice Total	110.50		

Tax Detail...

Tax Detail

Document: 0100059 Customer: 01-ABF American Business Futures

Schedule: AVATAX AvaTax Schedule

	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

OK

Sage 100

Sales tax modifications manually performed will not be posted to Avatax

OK



**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.



A/R Invoice Data Entry (ABC) 5/17/2023

Invoice Number: 0100060-IN Batch: 00005 Customer: 01-ABF

Customer No: 01-ABF American Business Futures

Customer PO:

Invoice Date: 5/17/2023 Due Date: 6/16/2023 Discount Date: 5/17/2023 Net Invoice Amt: .00

Terms Code: 01 Net 30 Days Ship Method: UPS BLUE Salesperson: 0100 Jim Kentley

Sales Tax Schedule: WI MILMIL Milwaukee

Print Invoice: ☒ Fax: ☐ Batch Fax: ☐

E-mail Address: artie@sage.sample.com

Buttons: Quick Print... Accept Cancel Delete

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

Ship To Address Entry

Location Code: Name:

Country: Address:

ZIP/Postal Code: City: State/Province:

Buttons: OK Cancel

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.

A/R Repetitive Invoice Entry (ABC) 5/17/2023

Customer No: 01-ABF Name: American Business Futures Reference: 0050

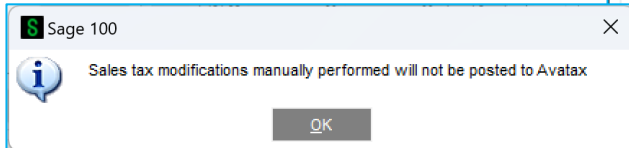
Buttons: Copy From... Customer...

Totals Tab:

Taxable Amount	.00	Amount Subject to Commission	2,295.00
Nontaxable Amount	2,295.00	Commission Rate	10.000 %
Freight	121.25	Commission Amount	229.50
Sales Tax	.00		
Invoice Total	2,416.25		

Buttons: Tax Detail... Accept Cancel Delete

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 Detail**

Document: 0100059 Customer: 01-ABF American Business Futures  
Schedule: AVATAX AvaTax Schedule

	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
				<b>Total</b>			.00

OK

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.

**A/R Repetitive Invoice Entry (ABC) 5/17/2023**

Customer No: 01-ABF American Business Futures  
Reference: 0050

1. Header 2. Lines 3. Totals 4. Payment

Customer PO: [Field]

Select Cycle: 31  
Start Billing: 1/31/2025  
Stop Billing: [Field]  
Net Invoice: 2,295.00

Terms Code: 01 Net 30 Days  
Ship Method: UPS BLUE  
Salesperson: 0100 Jim Kentley  
Comment: Monthly supply order

Sales Tax: Schedule WI Wisconsin  
Last Billed: 5/31/2025 Times Billed: 5  
Print Invoice: [checked]

Ship-To Address: [Field] **Ship-To**

Accept Cancel Delete

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.

**Ship To Address Entry**

Location Code: [Field] Name: [Field]

Country: [Field]  
Address: [Field]  
ZIP/Postal Code: [Field] State/Province: [Field]

City: [Field]

OK Cancel

**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.

The Tax Detail window displays the following information:

- Document: 0100059, Customer: 01-ABF, American Business Futures
- Schedule: AVATAX, AvaTax Schedule

	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:

Sage 100 message box: Sales tax modifications manually performed will not be posted to Avatax. OK

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.

The Sales Order Entry window shows the following details:

- Order Number: 0000181
- Customer No.: 01-ABF, American Business Futures
- Bill To Address: American Business Futures, 2131 N. 14th Street, Suite 100, Accounting Department, ZIP 53205-1204, City Milwaukee, State/Province WI.
- Ship To Address: 2 Residential Address, American Business Futures, 5411 Kendrick Place, ZIP 53120, City Racine, State/Province WI.

Buttons at the bottom: Print Order, Print Pick, 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  
Discount Rate: 5.000%  
Discount Amount: 75.33

Deposit Payment Type: NONE  
Check Number:  
Deposit Amount: .00

Taxable Amount: .00  
Non-Taxable Amount: 1,431.27

Commission Rate: 10.000%  
Sales Tax Amount: .00  
Order Total: 1,431.27

Ship Zone:  
Ship Weight: 00000  
Freight Amount: .00

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

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

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

	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

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:

**Sage 100**

Sales tax modifications manually performed will not be posted to Avatax

OK

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.

**S/O Invoice Data Entry (ABC) 5/17/2023**

Invoice No. 0100058

Customer No. 01-ABF American Business Futures

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

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

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.



## 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.

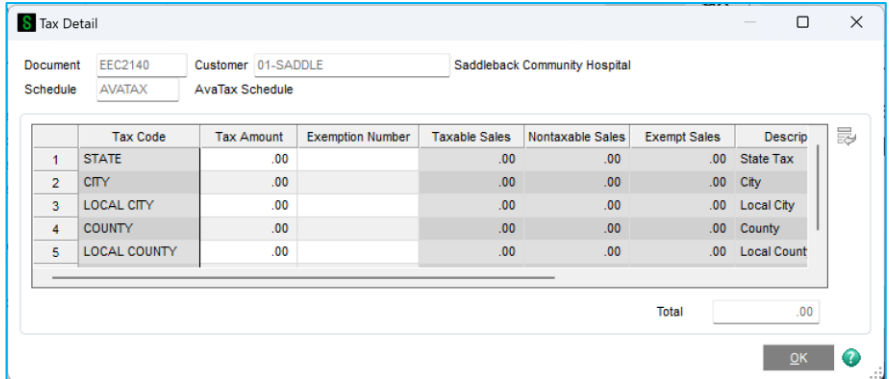
## Job Cost Billing Data Entry

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.



**Tax Detail**

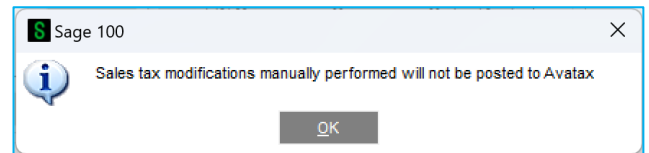
Document: EEC2140 Customer: 01-SADDLE Saddleback Community Hospital

Schedule: AVATAX AvaTax Schedule

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

Total: .00

OK



**Sage 100**

Sales tax modifications manually performed will not be posted to Avatax

OK



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: Longitude/Latitude

AvaTax utilizes Custom Office to add new Longitude/Latitude fields to Files and Panels. The Sage 100 reseller/user must add the Longitude/Latitude fields in order to utilize this feature. Here are the steps in setting up those User-Defined Fields:

### Adding UDF's using Custom Office

In Custom Office, select the User-Defined Field and Table Maintenance. Add the UDF\_LONGITUDE and UDF\_LATITUDE fields to the Dictionaries listed below. The field must be a **String** field with at least 15 characters, although you can make the field size larger.

- AR Customer Master
- AR Invoice Header
- SO Ship to Address
- SO Sales Order Detail
- SO Sales Order Header
- SO Invoice Detail
- SO Invoice Header

Below is an example of the setup of the Longitude/Latitude UDFs:

AR Customer Master : Edit Field

Field Name

UDF\_LATITUDE [ Locked ]

Description

Latitude

Control Type

☒ Multi-Line
 ☐ Drop-Box
 ☐ List-Box
 ☐ Check-Box

1. Attributes

2. Validation

3. Data Sources

Data Type

☒ String [ Locked ]
 ☐ Numeric
 ☐ Date

Maximum Length

20 [ May not be reduced below 20 ]

Display Attributes

☐ Uppercase
 ☐ Fixed Font
 ☐ Center Text
 ☐ Right-Justify
 ☐ Exclude from Report Selection
 ☐ Mask Display

☐ Mask

☐ Default Value

☒ Caption

Latitude

AR Customer Master : Edit Field

Field Name

UDF\_LONGITUDE [ Locked ]

Description

Longitude

Control Type

☒ Multi-Line
 ☐ Drop-Box
 ☐ List-Box
 ☐ Check-Box

1. Attributes

2. Validation

3. Data Sources

Data Type

☒ String [ Locked ]
 ☐ Numeric
 ☐ Date

Maximum Length

20 [ May not be reduced below 20 ]

Display Attributes

☐ Uppercase
 ☐ Fixed Font
 ☐ Center Text
 ☐ Right-Justify
 ☐ Exclude from Report Selection
 ☐ Mask Display

☐ Mask

☐ Default Value

☒ Caption

Longitude

## Mapping the UDF's using Custom Office

Map the UDF\_LONGITUDE and UDF\_LATITUDE fields in the Dictionaries. For the following Data Dictionaries, select the UDF\_LONGITUDE and UDF\_LATITUDE fields you added and then select the **Data Sources** tab:

- **SO Ship to Address** – map from CustomerNo. Do this for both UDFs.

1. Attributes		2. Validation		3. Data Sources		
Business Object	Select	Data Source	Column	Ignore	Expression	DM
SO_ShipToAddress_bus	<input checked="" type="checkbox"/>	CustomerNo	UDF_LATITUDE	<input type="checkbox"/>		

1. Attributes		2. Validation		3. Data Sources		
Business Object	Select	Data Source	Column	Ignore	Expression	DM
SO_ShipToAddress_bus	<input checked="" type="checkbox"/>	CustomerNo	UDF_LONGITUDE	<input type="checkbox"/>		

- **SO Sales Order Header** – Map from ShipToCode. Do this for both UDFs.

Business Object	Select	Data Source	Column	Ignore	Expression	DM
SO_SalesOrder_bus	<input checked="" type="checkbox"/>	ShipToCode	UDF_LATITUDE	<input type="checkbox"/>		
SO_SalesJournal_upd	<input type="checkbox"/>					
IT_ShoppingCart_upd	<input type="checkbox"/>					
RA_GenerateTransactions_upd	<input type="checkbox"/>					
SO_SalesOrder_bus:CopyFromSalesOrder	<input type="checkbox"/>					
SO_SalesOrder_bus:CopyFromInvoiceHistory	<input type="checkbox"/>					
SO_SalesOrder_bus:CopyFromOrderHistory	<input type="checkbox"/>					
SO_SalesOrder_bus:CreateFromMasterRepe	<input type="checkbox"/>					
SO_SalesOrder_bus:CreateFromRMAReturn	<input type="checkbox"/>					

- **SO Invoice Header** – Map from ShipToCode. Do this for both UDFs.

Business Object	Select	Data Source	Column	Ignore	Expression	DM
SO_Invoice_bus	<input checked="" type="checkbox"/>	ShipToCode	UDF_LATITUDE	<input type="checkbox"/>		
RA_GenerateTransactions_upd	<input type="checkbox"/>					
SO_Invoice_bus:CreditMemoFromInvoiceHisto	<input type="checkbox"/>					

- **AR Invoice Header** – Map from CustomerNo. Do this for both UDFs.

Business Object	Select	Data Source	Column	Ignore	Expression	DM
AR_Invoice_bus	<input checked="" type="checkbox"/>	CustomerNo	UDF_LONGITUDE	<input type="checkbox"/>		
AR_Invoice_bus:CopyFromRepetitiveInvoice	<input type="checkbox"/>					
AR_Invoice_bus:CreditMemoFromInvoiceHisto	<input type="checkbox"/>					

## Adding UDF's to the Panels using Customizer

In Custom Office, select the Customizer Selection to add the UDFs to the appropriate panels.

### Accounts Receivable / Customer Maintenance

You can select add the UDFs to the PMAIN or PADDL Tab. The PMAIN Tab is recommended as there is available space:

Customize: AR\_CUSTOMER.M4L - PMAIN [ Main Folder ]

Country Address Residential ☐

ZIP/Postal Code City State/Province

Telephone Ext

Fax

E-mail Address URL Address

Salesperson Split Comm...

Tax Schedule Exemptions...

Terms Code Primary Contact Ship Code Primary Ship To

Credit Hold Credit Limit

Latitude Longitude

### Accounts Receivable / Customer Maintenance / ShipToAddress

You can select add the UDFs to the DSHIPTOADDR:

Customize: AR\_CUSTOMER.M4L - DSHIPTOADDR [ Customer Ship-To Address Maintenance ]

Location Code Primary ☐

Name

Country Address Residential ☐

ZIP/Postal Code Longitude Latitude

City State/Province

Telephone Ext

Fax Batch Fax ☐

E-mail Address

Contact Warehouse Salesperson Ship Via Entity Use Code

Sales Tax Tax Schedule Exemptions...

Relate to Sage CRM ☐ Sage CRM Contact

Accept Cancel OK

"Longitude" - Unknown [ 29 , 11.5 ] [ 45 x 1.5 ]

## AR Invoice Entry / Sales Order Entry / SO Invoice Data Entry

You can select add the UDFs to the Header or Address tabs of these data entries. If you have “Enable Ship-To by Sales Order Detail” enabled in AvaTax Configuration Options, then you can also add the UDFs to the Lines Grids in Sales Order Entry and SO Invoice Data Entry.

## Using Longitude / Latitude in Tax Calculation

Once the UDFs are setup in Custom Office, and added to the appropriate panels, you can enter the Longitude/Latitude for those Customers and/or Ship-To Codes that need them.

**NOTE: The Address Validation is NOT enabled for Longitude/Latitude.**

Here is a sample of the entry:

Latitude	<input type="text" value="32.973540"/>
Longitude	<input type="text" value="-117.091500"/>

Once setup, the Sales Tax Calculation will use the Longitude/Latitude fields to calculate Tax instead of the Street Address.

## Section F: Troubleshooting

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

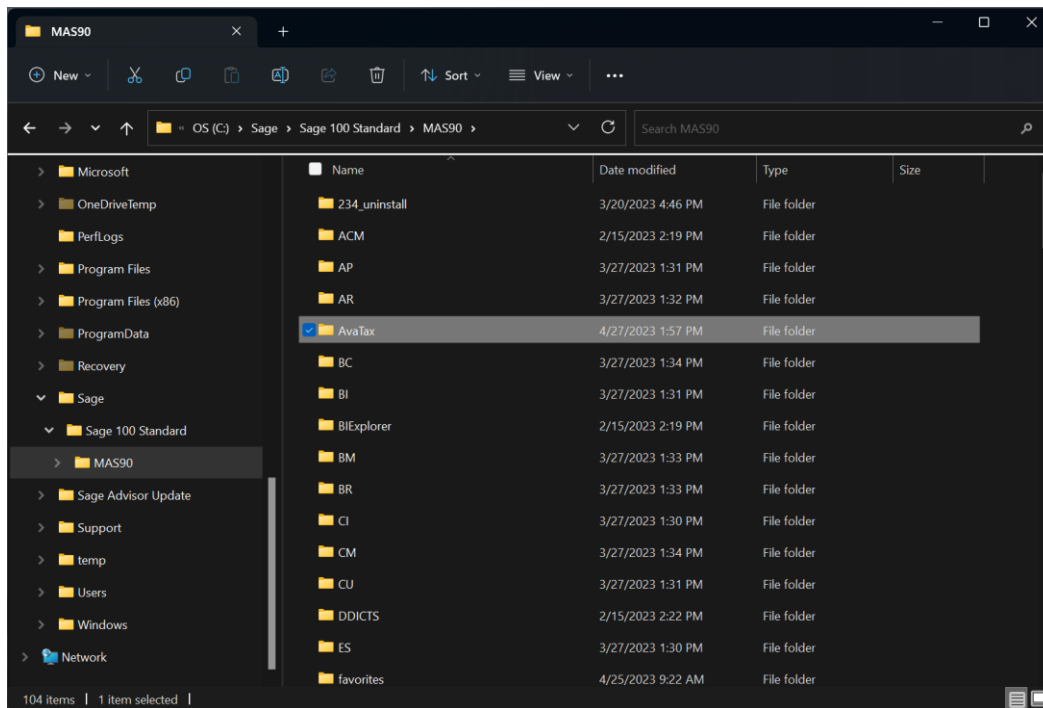
### Avalara Knowledge Center

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

### [Avalara Knowledge Center](#)

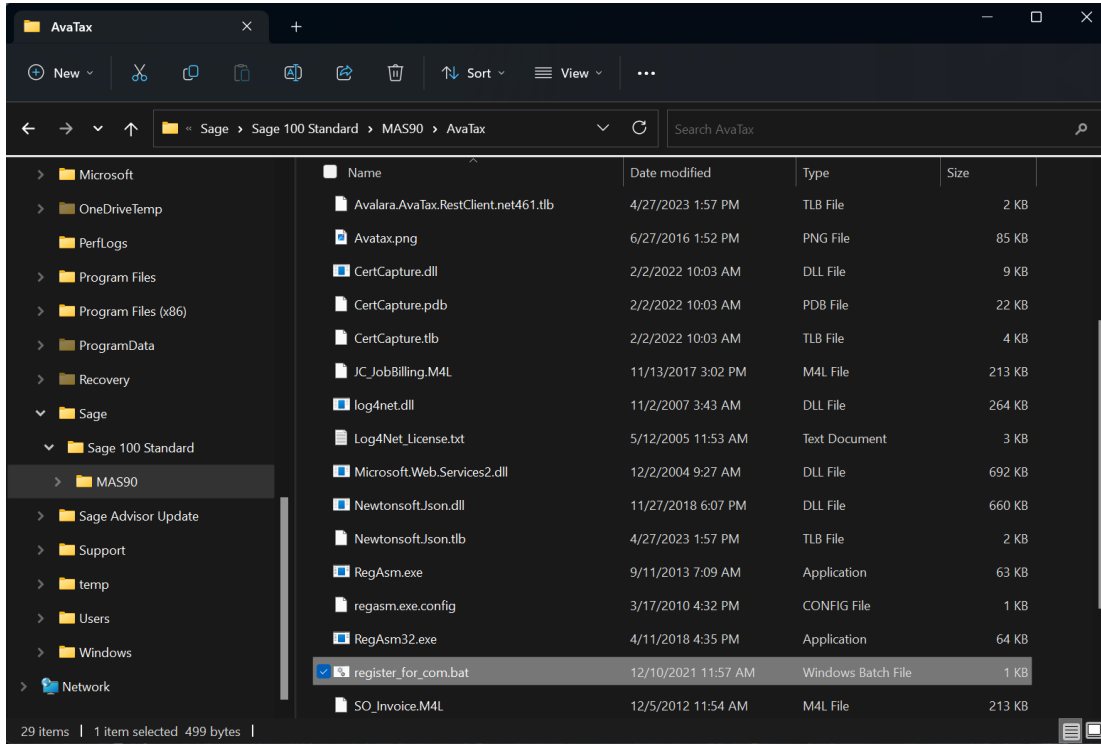
### Register the Avalara DLLs

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 G: 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

### **AR234\_AVA\_CustomerExemptions**

- ARDivisionNo
- CustomerNo
- TaxExemptionNo
- SignedDate
- ExpirationDate
- Status
- ExemptionFile
- EntityUseCode
- ExemptState
- DateCreated
- UserCreatedKey
- TimeCreated
- DateUpdated
- UserUpdatedKey
- TimeUpdated

## **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 H: 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 ECM.
- Avatax Configuration Options has been modified to include multiple options to support ECM.
- 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 ECM database.
- Customer Maintenance has been updated to maintain and display ECM 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**

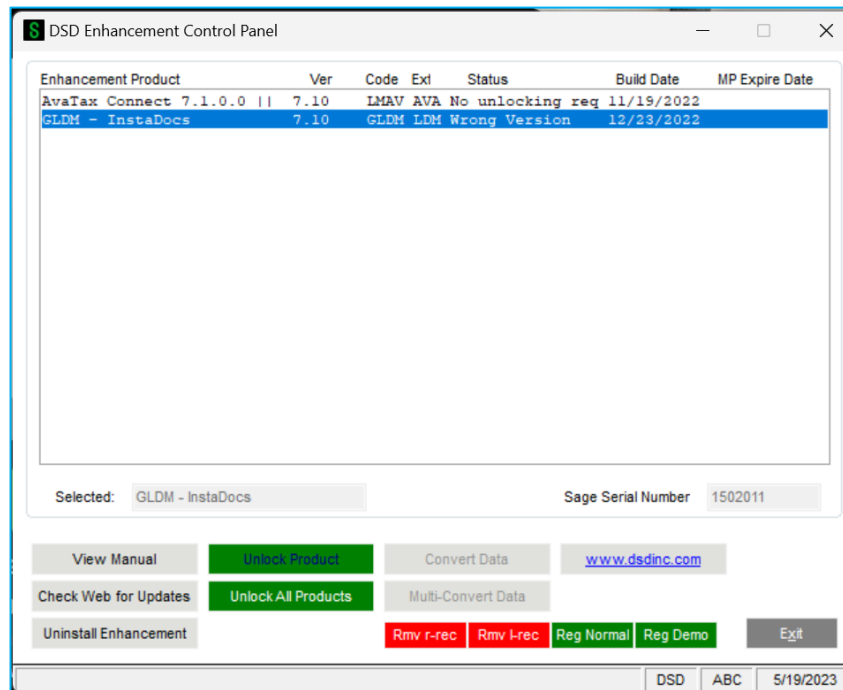
- Job Addresses can now be used for sales tax calculations as performed in Job Billing Entry.
- Job Address validations can now be performed in Job Maintenance

### **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.

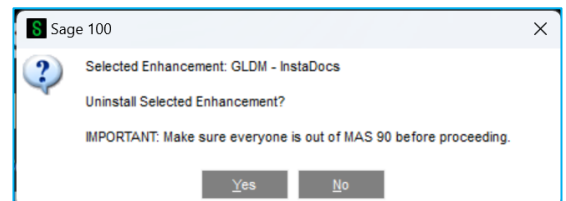
## Section I: Uninstall DSD Enhancements

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.



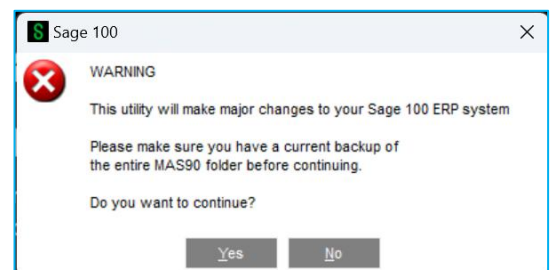
When accessing the **DSD Enhancement Control**, select the enhancement that you wish to Uninstall, and then select the **Uninstall Enhancement** button. The following message box will appear:

- 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.

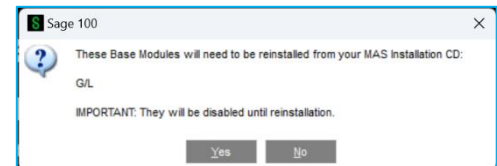
- Select **No** to exit the Uninstall Process.
- Select **Yes** to continue with the Uninstall Process.



**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.**

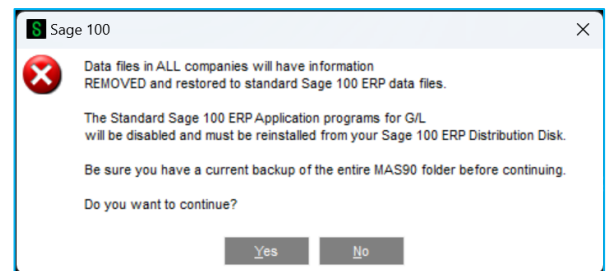
A message box will appear, and will display which of those specific Sage 100 modules you must reinstall afterwards.

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

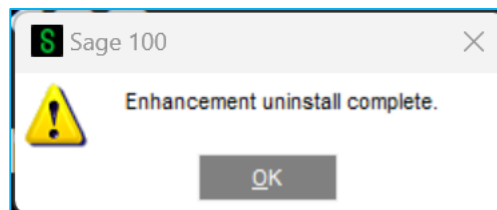


The following message box will appear, displaying the final warning message.

- 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 J: 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](mailto:enhancements@dsdinc.com)**



**[Enhancements Marketplace](#)**



**800-627-9032**