# Pivotal CRM AvaTax Setup and Processing

# Setup

#### Step 1. AvaTax System Setup

After importing the "AvaTax Connector" transport file into your Pivotal ToolKit and setting the appropriate security, you are now ready to setup the system.

From the Pivotal CRM Home screen create a new search.



Select the "AvaTax System" from the list of available tables. If this is not an option then it is most likely because of your Pivotal security setup.



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After you have selected "AvaTax System" table click the **<u>R</u>un Search** button.

The first time running the search you will see no records. Click on the "New Record" option under the actions side menu.

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Next you will need to enter your AvaTax Account#, License Key, URL and Ship From Address data. To save the information click the **Apply** button at the bottom of the screen. After you have saved your data you will need to verify the data by clicking the **Test Connection** button.

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Here is an example where the test connection failed due to an invalid Account code.

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After entering the Account code correctly the test connection is successful.

From the System setup screen, click on the Nexus tab. From here you select the states where you have Nexus. This system will only use the AvaTax service to calculate sales tax on the states you have selected.

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You also have options, to completely disable the AvaTax system so that the service is not used at all. You can disable the document commit process only, which allows the system to only calculate the sales tax but not post anything to the Avalara portal. And you can turn on or off the Address validation which validates both the Billing and Shipping addresses on the Order.

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# Step 2. AvaTax Product Codes

Starting another new Pivotal search, select the "AvaTax Product Codes" table, click **<u>R</u>un Search**, and then select the "New Record" from the actions side menu.

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You will need to enter the product codes for the product and services you are selling. We recommend using the codes provided by Avalara and they can help provide you a list that best fits your business.

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One of the AvaTax Product Codes is used for Shipping Charges. If your business passes these charges on to the customer you must assign this AvaTax Product Code under the AvaTax System setup.

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#### **Step 3. Pivotal Product Update**

Under your Pivotal Product screen, you will have a new AvaTax tab. From this area you will need to select the AvaTax Product Code that best fits each of your products. All items must have an AvaTax Product Code in order to accurately calculate sales tax.

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# Step 4. Pivotal Company Update

The Pivotal Company screen also has a new "AvaTax" tab. From this area you indicate whether or not a company is tax exempt and enter their tax exempt number.

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Organization chart - key contacts	Type:	
Competitor information	Customer City: + Los Angeles	
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Mew meeting (No invites)	Account code: C0815 Status: Green 🗾 Email: info@crmworld.com 🙆 www.abc.piv	
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# Processing

#### Step 1. Get Tax

From the Order screen you now have a **Get AvaTax** button. When clicked, the AvaTax service is called and the appropriate sales tax is returned and populated on the screen. A message will appear next to the button indicating whether or not the call to the AvaTax service was successful.

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A New meeting (No invites) Required:	
Mew meeting (With invites) Ship via:	
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Show direction Total taxes: (USD) 3,599.92	•
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A Search	
Save & Close     Apply     Refresh     Delete     Cancel     < Previous	
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Additional information about the results from the AvaTax service can be found under the AvaTax tab on the Order.

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Interactions 🔺		
New email		
New meeting (No invites)	Required:	
New note	Ship via:         Shipped on:         Quote:         5/8/2015 - 39,999.00 - ABC Opportun via (2015)	
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Shortcuts	Tax Amt: 3,599.92	
My calendar	AvaTax Tax Committed	
& My employee profile		
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# Step 2. Commit Tax

When Order Status is changed to "Invoiced" the AvaTax button changes to **Commit AvaTax**. This action will then post the transaction to Avalara web portal.

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💯 Track shipment	Date: • 5/ 8/2015	
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My employee profile		
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A Search	Commit AvaTax Success Order total: (USD) 43,598.92	
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	Save & Close Apply <u>Refresh Delete Cancel</u> < Previous <u>Next</u> > <u>Back To List</u>	
	0 Messages User: CRM\Administrator Environment: DEMO	(DEMO)

# Step 3. Void Tax

If the Order Status is changed to "Invoiced" the AvaTax button changes to **Void AvaTax**. Clicking this button will void the transaction on the Avalara web portal.

Order: 5/8/2015 - ABC Architect - Pires Provided - Pires -	votal CRM - Smart Client Framework _ 1	= x
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💯 Track shipment	Date: • 5/ 8/2015 V Partner company:	
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New meeting (No invites)	Required:	
New meeting (With invites)	Ship via: Shipped on: 5/8/2015 - 39,999.00 - ABC Opportun V	
New hote	Tracking:	
Search interactions		
Run an existing	Details Payment Rilling Shipping AvaTax	
The Mail merge		
Report	Product   Package   Code   Unit Price (USD)   Qty   Discount %   Extended Price (USD)   Tax (USD)	
🔎 Search	iGuava connector (IGC I IGC 0.00 100 0.0 0.00 0.00	
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My employee profile		
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A Mail merge	Shipping: (USD) 0.00	
Search	Void AvaTax Order total: (USD) 43,598.92	
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	0 Messages User: CRM\Administrator Environment DEMO	(DEMO)

# Step 4. Tax not required

If the Order is not in a Nexus defined state, then the **Get AvaTax** button will not be active.

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Corder Information     Account management
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Mail merge Get AvaTax Sales tax not required. Order total: (USD) 240,000.00
2 Search
Save & Close         Apply         Refresh         Delete         Cancel          Mext >         Back To List
0 Messages User: CRM\Administrator Environment: DEMO(DEMO)

# Step 5. Commit Tax not enabled

When the AvaTax System is set to not allow document commit the **Commit AvaTax** button will not be active.

Order: 5/8/2015 - ABC Architect - Pir	votal CRM - Smart Client Framework _	x
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97 Track shipment	Date: • 5/ 8/2015 🔽 Partner company: 🔽 🗔 🔎	
	Status: • Involved V Partner contact:	
New email		
New meeting (No Invites)	Required:	
New note	Ship via: Shipped on: Quote: [5/8/2015 - 39,999.00 - ABC Opportun ▼ ]	
New task	Tracking: ABC Archit V ABC Archit V	
Search interactions		
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Create a new	Shipping: (USD) 0.00	
Mail merge     O Search	Commit AvaTax Tax Commit service has been disabled. Order total: (USD) 43,598,92	
Jearch		
	Save & Close Apply Refresh Delete Cancel < Previous Next > Back To List	
	0 Messages User: CRMAdministrator Environment: DEMO(D	EMO)

# Step 6. AvaTax not enabled

When the AvaTax System is set to disabled, then no taxing service will be active.

Order: 5/11/2015 - Santa Rosa In - Pi	vivotal CRM - Smart Client Framework _ 1	= x
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Order actions	Order: 5/11/2015 - Santa Rosa Interior Design	-
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🔞 New order	Order information Account management	
5how invoice	P.O. #: • Cathy Green	
💯 Track shipment	Date: + 5/11/2015  Partner company:	
Interactions 🔶	Status: Ordered V	
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New meeting (No invites)	Required:	
New meeting (With invites)	Ship via: Shipped on: Slipped	
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Run an existing	Dataile Daumant Dillion Chinging Austra	
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Search	IGuava TV (TTV) TTV 200.00 1,000 0.0 200,000.00 0.00	
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Shortcuts 😞		
🦀 Catch up with contacts		
🔟 My calendar		
💑 My employee profile		
🙀 Show direction	✓         Discount approved by:         ✓         Total taxes: (USD)         0.00	
Create a new 🔶	Shipping: (USD) 0.00	
🍄 Mail merge	Get AvaTax Tax service has been disabled. Order total: (USD) 200,000.00	
Search		
	Save & Close         Apply         Refresh         Delete         Cancel         < Previous         Next >         Back To List	
/	0 Messages User: CRM\Administrator Environment: DEMO	(DEMO)

#### **Step 7. Use Address Validation**

When the AvaTax System is set to use Address Validation during the Order process the system will validate both the Billing and Shipping Address information. Both addresses will need to be valid before sales tax is calculated to ensure the correct taxes are being charged on the order.

Order: 3/2/2015 - ABC Architect - Pivotal CRM - Smart Client Framework	_ = X	
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Dashboard My Opportunities My Forecast Leads Quotes Orders Forecast Periods QlikView Sales		
Order actions Order: 3/2/2015 - ABC Architect Con	ipany 👻	
S Cancel order		
New order		
P.O. #: * 77383645 Currency: * USD 🔽 🚺	Account manager: * Jane Atkinson 🗾 🗾	
Date: * 3/ 2/2015	Partner company:	
New email Status: * Ordered	Partner contact:	
M New meeting (No invites)		
New meeting (With invites)		
New note	Quote: 3/2/2015 - 300,000.00 - New ABC Op 🗾 🗾	
New task	Opportunity: New ABC Opportunity- ABC Architect 🗾 🗾	
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Run an existing   Details Payment Billing Shipping AvaTax		
Mail merge	Billing address	
Company: ABC Architect Company - Los Angeles 🗾 🔯 🔎	Attention: * John Black	
Static list Contact: * John Black	Address: * 504 Crowe Farm Rd	
Shortcuts		
Catch up with contacts		
My calendar		
A My employee profile	City: * Waeterloo	
Show direction	State: IL Zip/PC: * 62298	
Create a new	Country: * United States	
P Search	Phone: * +1 (310) 555-1000	
Save & Close         Apply         Refresh         Delete         Cance	el < <u>Previous</u> <u>N</u> ext > <u>Back To List</u>	
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