

Pivotal CRM

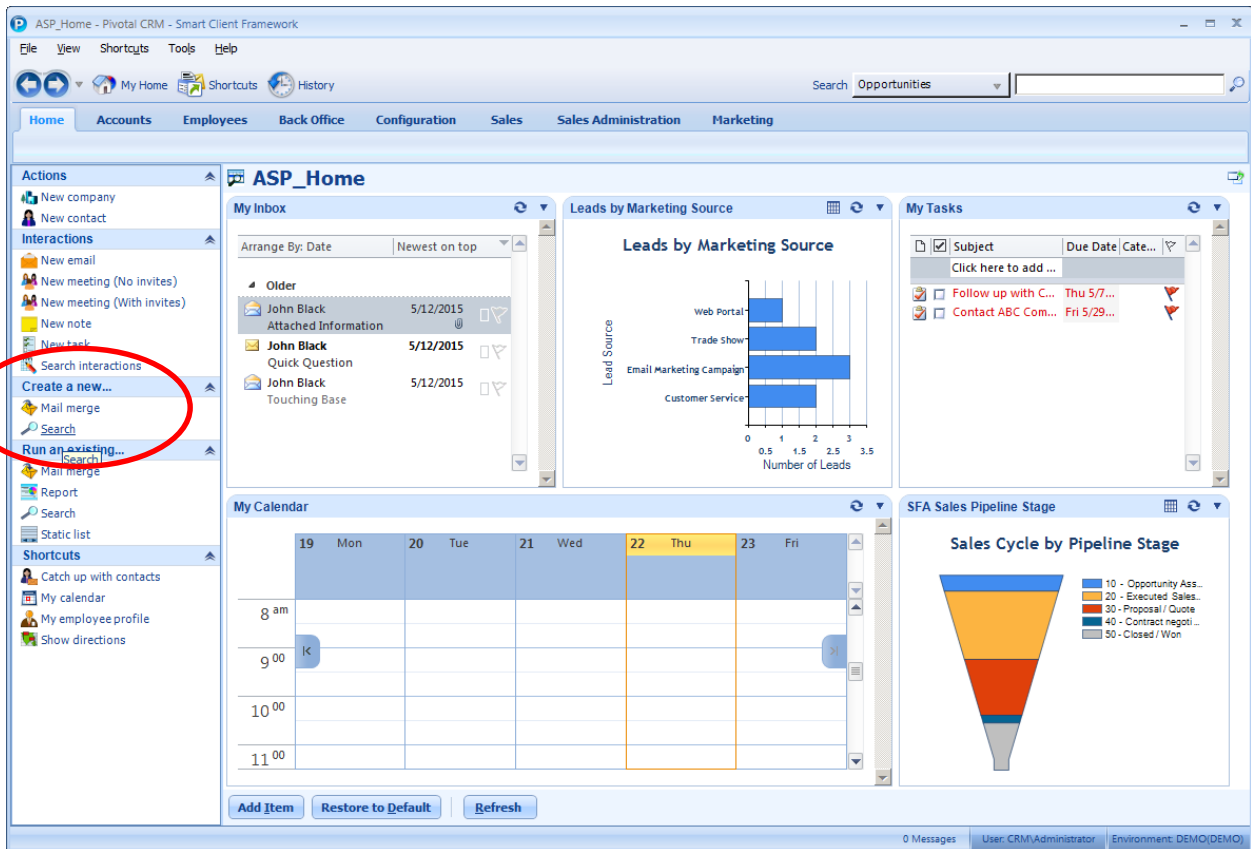
AvaTax Setup and Processing

Setup

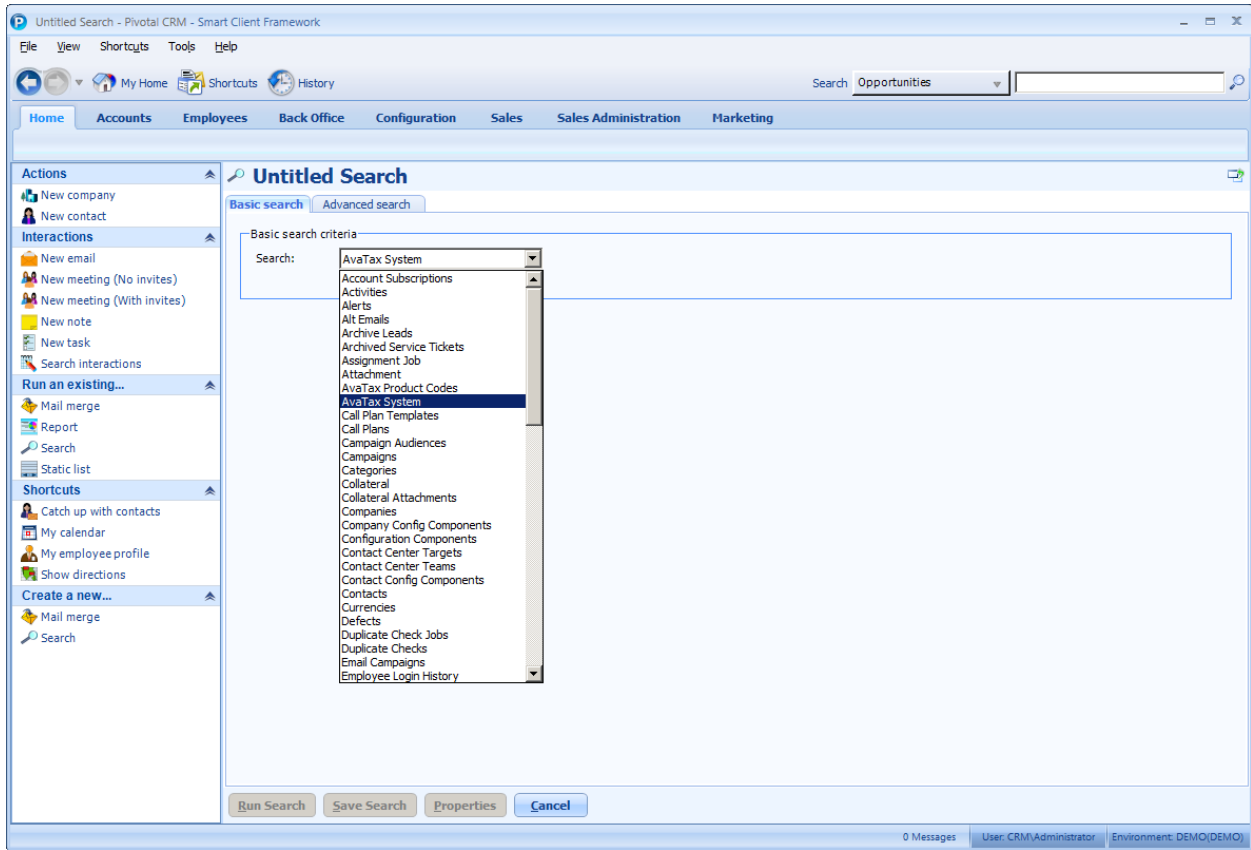
Step 1. AvaTax System Setup

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

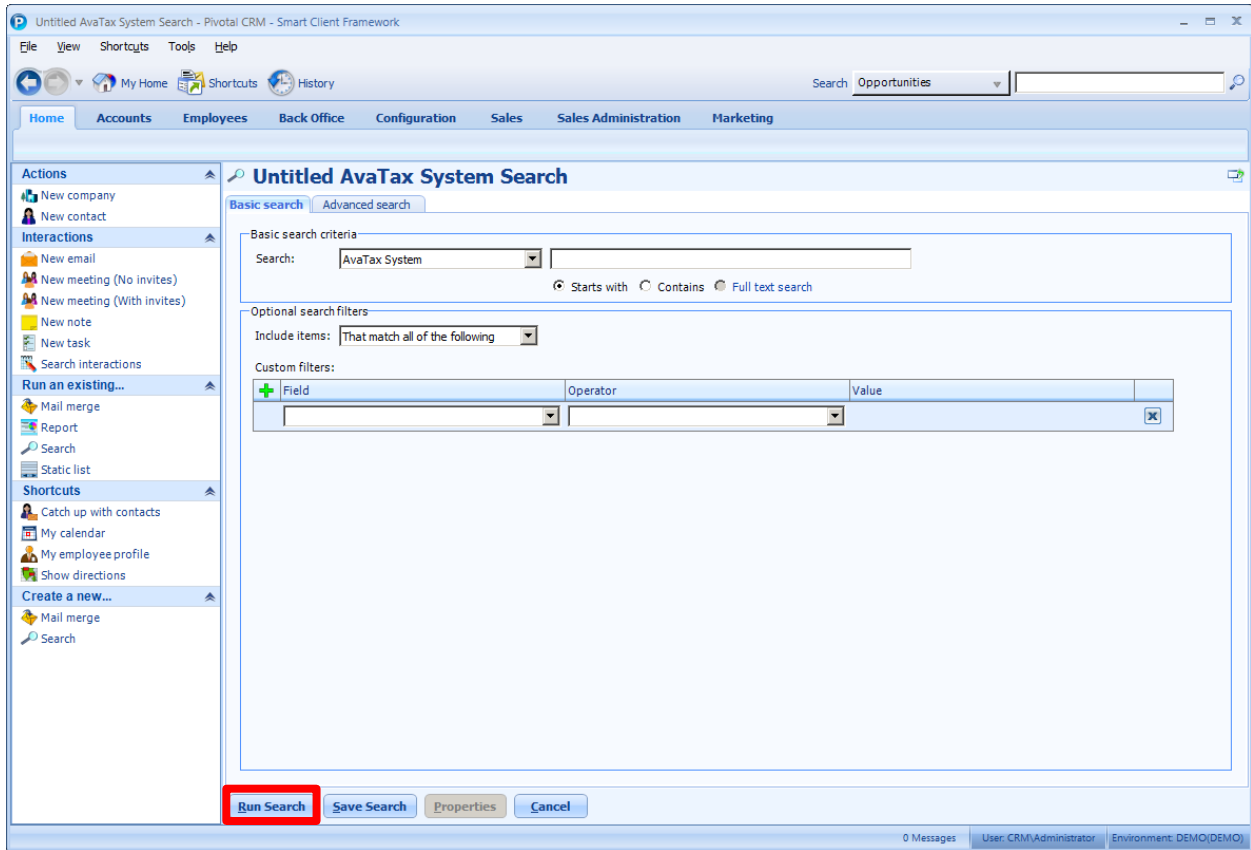
From the Pivotal CRM Home screen create a new search.



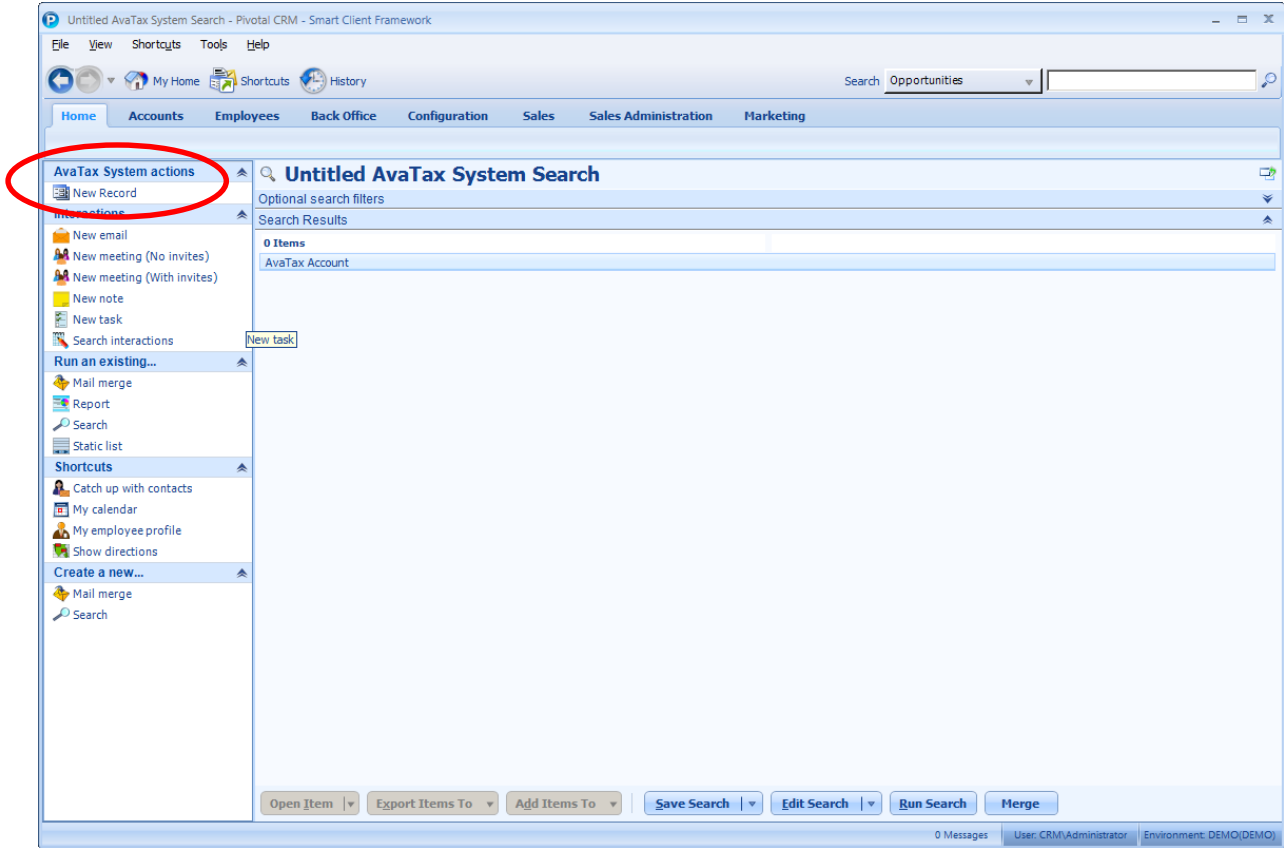
Select the "AvaTax System" from the list of available tables. If this is not an option then it is most likely because of your Pivotal security setup.



After you have selected "AvaTax System" table click the **Run Search** button.



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



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.

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

The screenshot displays the 'AvaTax System: 1100158554' configuration window. The 'AvaTax System Configuration' section contains the following fields and options:

- AvaTax Account: 1100158554e
- AvaTax LicenseKey: D18713CF27A48E6B
- AvaTax URL: https://development.avalara.net
- Options: Disable Document Commit, Disable AvaTax, Use Address Validation
- AvaTax Product Code Freight: Shipping Only - common carrier - FOB destination (FR020100)

The 'Test Connection' button is highlighted with a red box, and a red arrow points to the error message 'AvaTax Tax Service: Test Failed' displayed next to it. Below the configuration fields is the 'Ship From' section with the following information:

- ShipFrom Name: RCS, Inc.
- Address 1: 5904 Crowe Farm Rd.
- Address 2: (empty)
- City: Waterloo
- State: IL
- Zip: 62298

At the bottom of the window, the 'Apply' button is highlighted with a red box. The status bar at the bottom right shows '0 Messages', 'User: CRM/Administrator', and 'Environment: DEMO/DEMO'.

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

The screenshot displays the 'AvaTax System Configuration' window for account 1100158554. The interface includes a top navigation bar with tabs for Home, Accounts, Employees, Back Office, Configuration, Sales, Sales Administration, and Marketing. A left sidebar lists various actions such as 'New Record', 'Interactions', 'Run an existing...', 'Shortcuts', and 'Create a new...'. The main configuration area contains the following fields and options:

- AvaTax Account:** 1100158554
- AvaTax LicenseKey:** D18713CF27A48E6B
- AvaTax URL:** https://development.avalara.net
- Options:** Disable Document Commit, Disable AvaTax, Use Address Validation
- Test Connection:** A yellow button that has been clicked, resulting in the status 'AvaTax Tax Service: Test Successful'.
- AvaTax Product Code Freight:** Shipping Only - common carrier - FOB destination (FR020100)
- Ship From / Nexus:** A section with the following details:
 - ShipFrom Name: RCS, Inc.
 - Address 1: 5904 Crowe Farm Rd.
 - Address 2: (empty)
 - City: Waterloo
 - State: IL
 - Zip: 62298

At the bottom of the configuration window, there are buttons for 'Save & Close', 'Apply', 'Refresh', 'Delete', and 'Cancel'. The status bar at the very bottom shows '0 Messages', 'User: CRM/Administrator', and 'Environment: DEMO/DEMO'.

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.

AvaTax System Configuration

AvaTax Account: 1100158554 Disable Document Commit

AvaTax LicenseKey: D18713CF27A48E6B Disable AvaTax

Use Address Validation

AvaTax URL: https://development.avalara.net

[Test Connection](#) AvaTax Tax Service: Test Successful

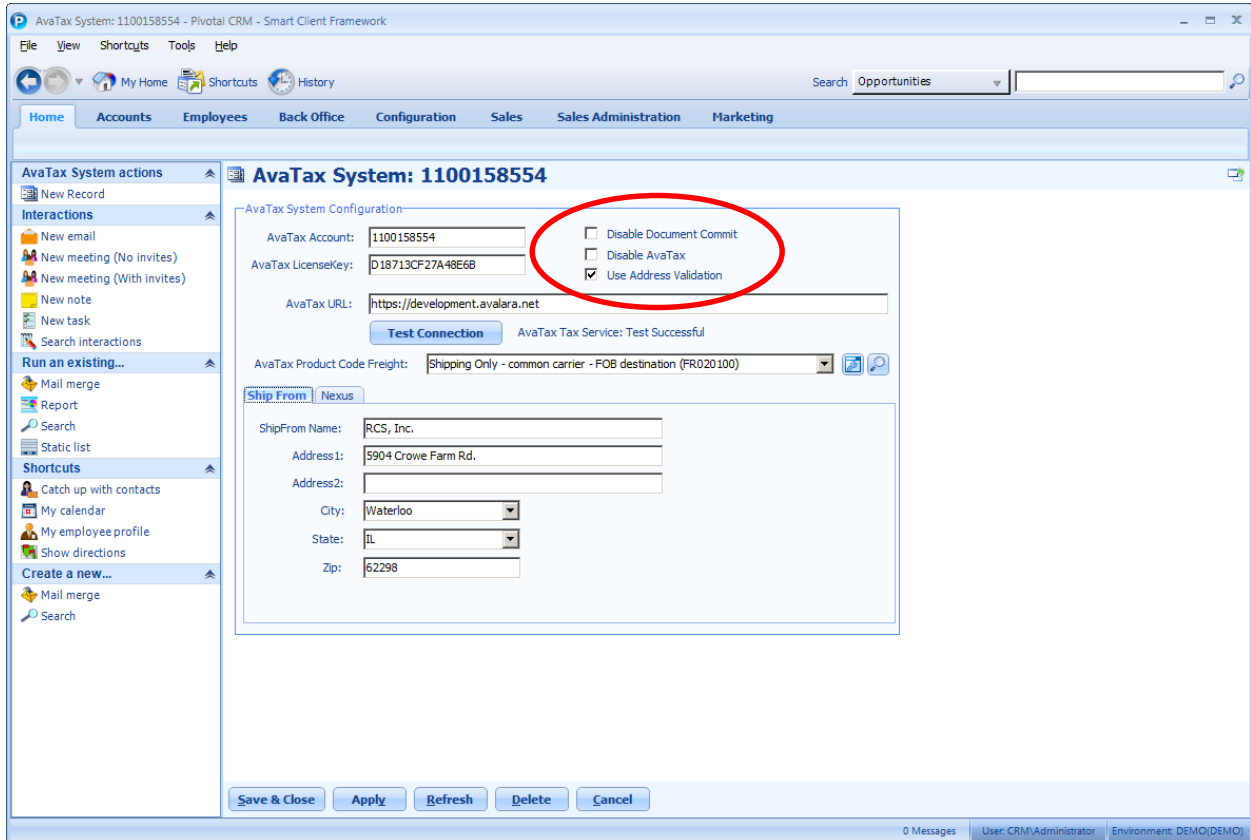
AvaTax Product Code Freight: Shipping Only - common carrier - FOB destination (FR020100)

Ship From	State	Nexus
	MO	<input checked="" type="checkbox"/>
	IL	<input checked="" type="checkbox"/>
	CA	<input checked="" type="checkbox"/>

Save & Close Apply Refresh Delete Cancel

0 Messages User: CRM\Administrator Environment: DEMO(DEMO)

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.



Step 2. AvaTax Product Codes

Starting another new Pivotal search, select the “AvaTax Product Codes” table, click **Run Search**, and then select the “New Record” from the actions side menu.

The screenshot shows the Pivotal CRM search interface. The window title is "Untitled AvaTax Product Codes Se - Pivotal CRM - Smart Client Framework". The main menu includes "Home", "Accounts", "Employees", "Back Office", "Configuration", "Sales", "Sales Administration", and "Marketing". The search interface is titled "Untitled AvaTax Product Codes Search" and has two tabs: "Basic search" (selected) and "Advanced search".

Basic search criteria:
Search: AvaTax Product Codes
Options: Starts with (selected), Contains, Full text search

Optional search filters:
Include items: That match all of the following

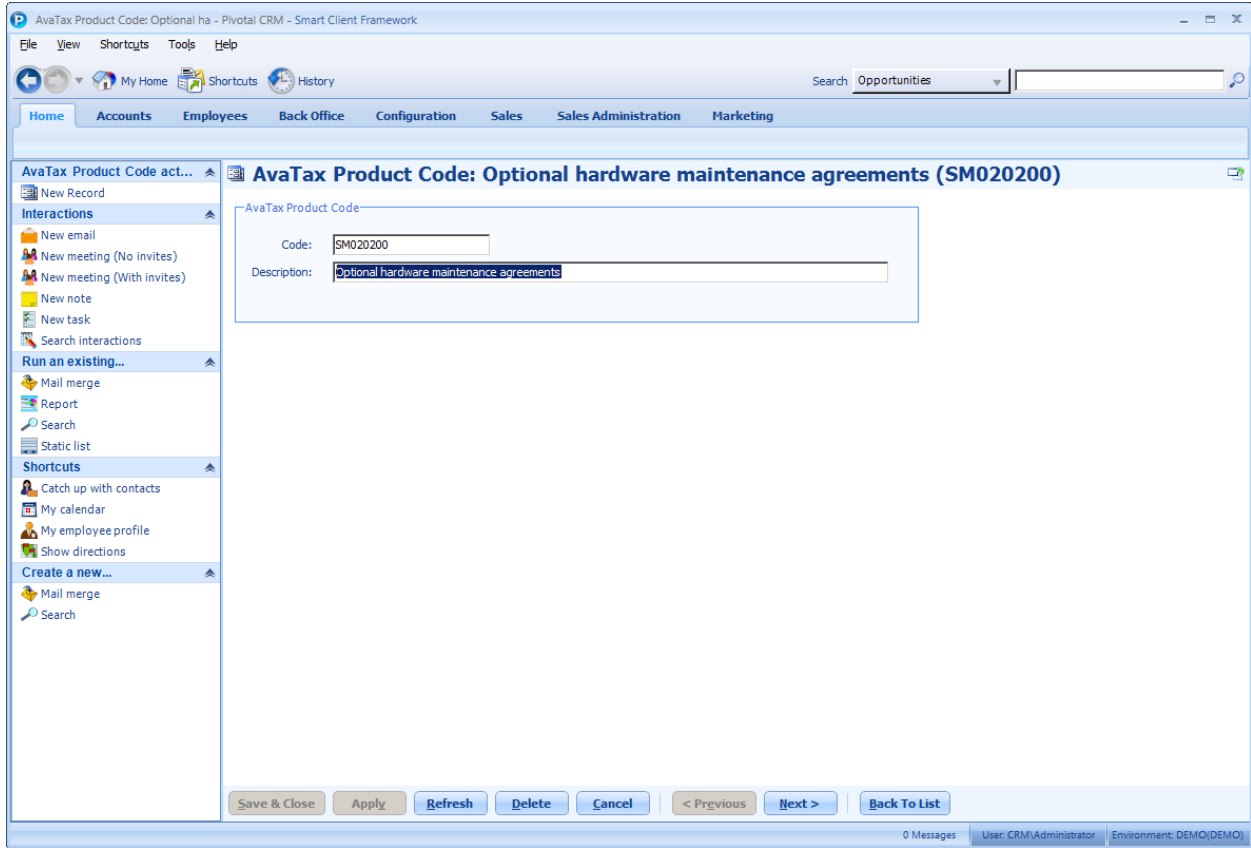
Custom filters:

Field	Operator	Value

Buttons at the bottom: Run Search, Save Search, Properties, Cancel.

Bottom status bar: 0 Messages, User: CRM/Administrator, Environment: DEMO(DEMO)

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.



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.

The screenshot displays the 'AvaTax System: 1100158554' configuration window. The 'AvaTax System Configuration' section includes the following fields:

- AvaTax Account: 1100158554
- AvaTax LicenseKey: D18713CF27A48E6B
- AvaTax URL: https://development.avalara.net
- Test Connection: AvaTax Tax Service: Test Successful
- AvaTax Product Code Freight: Shipping Only - common carrier - FOB destination (FR020100) (highlighted with a red box)

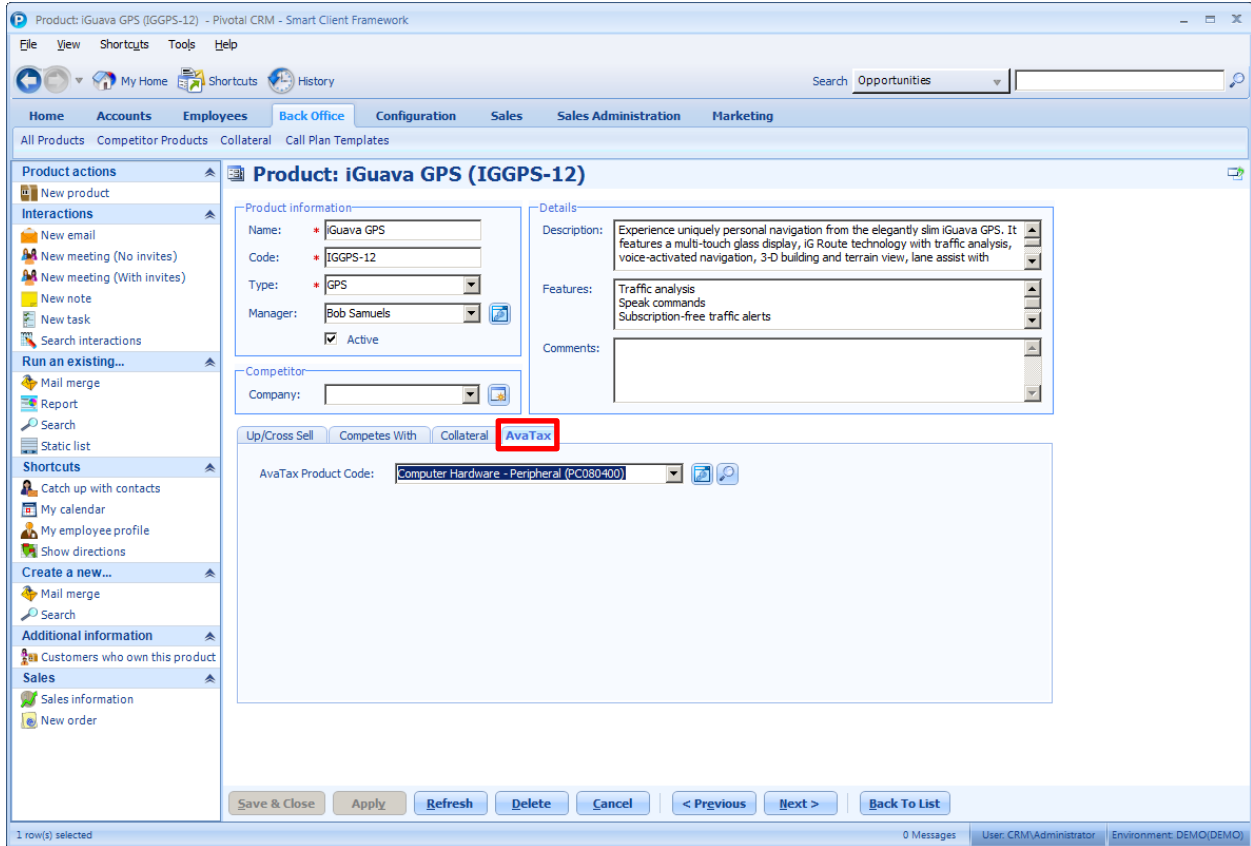
The 'Ship From' section contains the following information:

- ShipFrom Name: RCS, Inc.
- Address 1: 5904 Crowe Farm Rd.
- Address 2: (empty)
- City: Waterloo
- State: IL
- Zip: 62298

At the bottom of the window, there are buttons for 'Save & Close', 'Apply', 'Refresh', 'Delete', and 'Cancel'. The status bar at the bottom right shows '0 Messages', 'User: CRM/Administrator', and 'Environment: DEMO(DEMO)'.

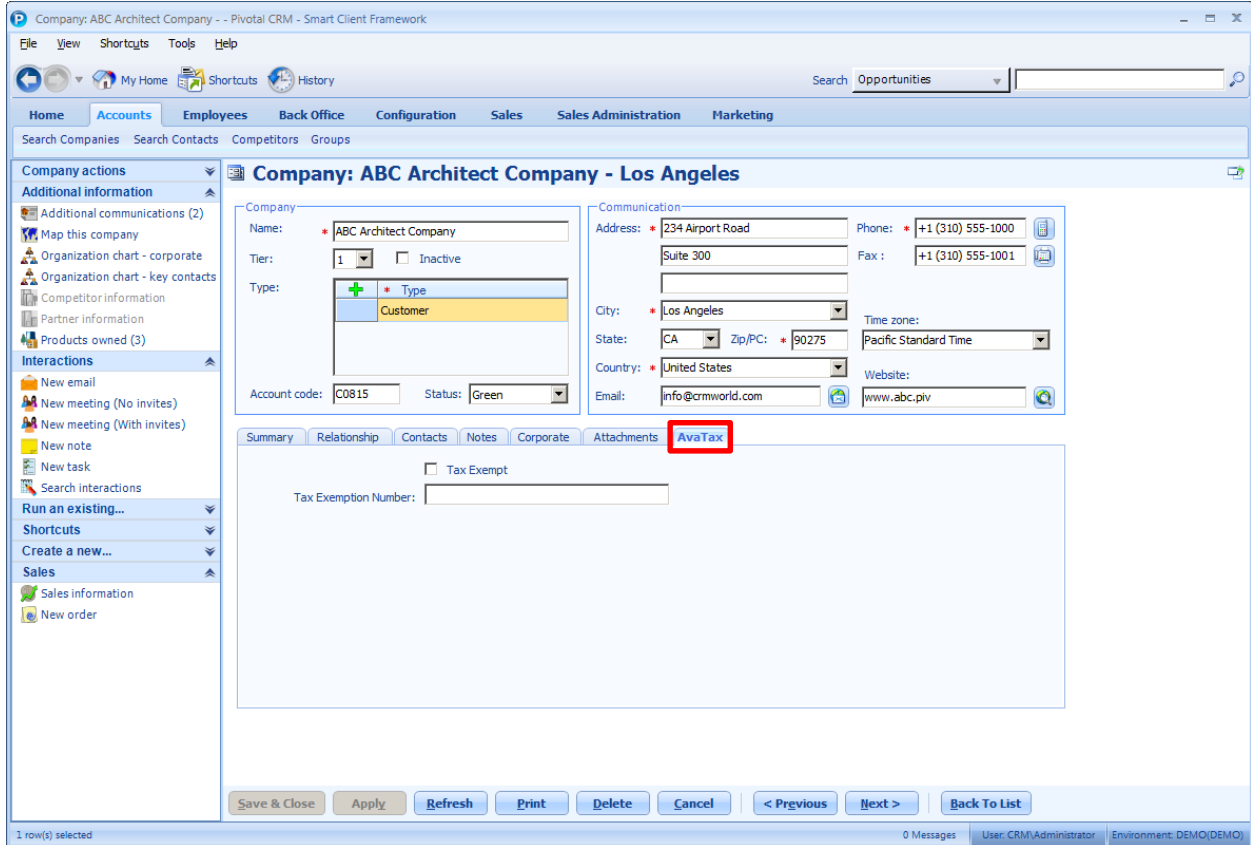
Step 3. Pivotal Product Update

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.



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.



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.

The screenshot shows the 'Order: 5/8/2015 - ABC Architect Company' screen. The 'AvaTax' tab is selected, displaying a table of products and their associated taxes. A 'Get AvaTax' button is highlighted with a red box, and a 'Success' message is shown next to it. Red arrows point to the 'Tax (USD)' column in the table, the 'Total taxes (USD)' row in the summary, and the 'Success' message.

Product	Package	Code	Unit Price (USD)	Qty	Discount %	Extended Price (USD)	Tax (USD)
Iguava connector (IGC...		IGC...	0.00	100	0.0	0.00	0.00
Iguava classic - 64GB (...)		IGC-64	399.99	100	0.0	39,999.00	3,599.92

Total discount: (USD)	0.00	Sub total: (USD)	39,999.00
<input checked="" type="checkbox"/> Discount approved by:		Total taxes: (USD)	3,599.92
		Shipping: (USD)	0.00
		Order total: (USD)	43,598.92

Additional information about the results from the AvaTax service can be found under the AvaTax tab on the Order.

The screenshot shows a CRM application window titled "Order: 5/8/2015 - ABC Architect - Pivotal CRM - Smart Client Framework". The main content area is titled "Order: 5/8/2015 - ABC Architect Company". The "AvaTax" tab is selected and highlighted with a red box. The AvaTax section displays the following information:

AvaTax Doc:	1ffff58f5-3666-4e6d-b1d1-a2b2
Result:	Success
Taxable Total:	\$9,999.00
Tax Amt:	\$3,599.92

There is a checkbox labeled "AvaTax Tax Committed" which is currently unchecked.

The interface includes a left-hand navigation pane with sections like "Order actions", "Interactions", "Run an existing...", "Shortcuts", and "Create a new...". The top navigation bar includes "Home", "Accounts", "Employees", "Back Office", "Configuration", "Sales", "Sales Administration", and "Marketing". The bottom status bar shows "0 Messages", "User: CRM/Administrator", and "Environment: DEMO/DEMO".

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.

The screenshot displays a CRM window titled "Order: 5/8/2015 - ABC Architect - Pivotal CRM - Smart Client Framework". The interface includes a navigation menu on the left with sections like "Order actions", "Interactions", "Run an existing...", and "Shortcuts". The main content area is titled "Order: 5/8/2015 - ABC Architect Company" and contains several panels:

- Order information:** P.O. #: test, Currency: USD, Date: 5/8/2015, Status: Invoiced.
- Account management:** Account manager: Sam Ample, Partner company, Partner contact.
- Links:** Quote: 5/8/2015 - 39,999.00 - ABC Opportur, Opportunity: ABC Opportunity 50 Units- ABC Archi.
- Details:** A table showing order items and a summary section.

Product	Package	Code	Unit Price (USD)	Qty	Discount %	Extended Price (USD)	Tax (USD)
Iguava connector (IGC...		IGC...	0.00	100	0.0	0.00	0.00
Iguava classic - 64GB (...)		IGC-64	399.99	100	0.0	39,999.00	3,599.92

Summary section:

- Total discount: (USD) 0.00
- Sub total: (USD) 39,999.00
- Total taxes: (USD) 3,599.92
- Shipping: (USD) 0.00
- Order total: (USD) 43,598.92

A red box highlights the "Commit AvaTax" button, which is followed by the text "Success". At the bottom of the window, there are buttons for "Save & Close", "Apply", "Refresh", "Delete", "Cancel", "< Previous", "Next >", and "Back To List". The status bar at the bottom right shows "0 Messages", "User: CRM/Administrator", and "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.

The screenshot displays a CRM application window titled "Order: 5/8/2015 - ABC Architect - Pivotal CRM - Smart Client Framework". The interface includes a menu bar (File, View, Shortcuts, Tools, Help), a search bar, and a navigation pane on the left with sections like "Order actions", "Interactions", "Run an existing...", and "Shortcuts". The main content area is titled "Order: 5/8/2015 - ABC Architect Company" and contains several panels:

- Order information:** P.O. #: test, Currency: USD, Date: 5/8/2015, Status: Cancelled, Required: (empty), Ship via: (empty), Shipped on: (empty), Tracking: (empty).
- Account management:** Account manager: Sam Ample, Partner company: (empty), Partner contact: (empty).
- Links:** Quote: 5/8/2015 - 39,999.00 - ABC Opportur, Opportunity: ABC Opportunity 50 Units- ABC Archt.
- Details:** A table with columns: Product, Package, Code, Unit Price (USD), Qty, Discount %, Extended Price (USD), Tax (USD).

Product	Package	Code	Unit Price (USD)	Qty	Discount %	Extended Price (USD)	Tax (USD)
Iguava connector (IGC...		IGC...	0.00	100	0.0	0.00	0.00
Iguava classic - 64GB (...)		IGC-64	399.99	100	0.0	39,999.00	3,599.92
- Summary:** Total discount: (USD) 0.00, Sub total: (USD) 39,999.00, Total taxes: (USD) 3,599.92, Shipping: (USD) 0.00, Order total: (USD) 43,598.92.

A red box highlights the "Void AvaTax" button in the summary section. At the bottom of the window, there are buttons for "Save & Close", "Apply", "Refresh", "Delete", "Cancel", "< Previous", "Next >", and "Back To List". The status bar at the bottom right shows "0 Messages", "User: CRM/Administrator", and "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.

The screenshot displays a CRM application window titled "Order: 4/28/2015 - Woods Interior Consulting". The interface includes a navigation menu on the left with sections like "Order actions", "Interactions", "Run an existing...", "Shortcuts", and "Create a new...". The main content area is divided into several panels:

- Order information:** P.O. #: 992837465, Currency: USD, Date: 4/28/2015, Status: Ordered.
- Account management:** Account manager: Cathy Green, Partner company, Partner contact.
- Links:** Quote: 4/28/2015 - 240,000.00 - Lizette Q4 F, Opportunity: Lizette Q4 Feb Tab Opportunity- Woo.
- Details (AvaTax tab):** A table listing products and their tax status.

Product	Package	Code	Unit Price (USD)	Qty	Discount %	Extended Price (USD)	Tax (USD)
iGuava pad - 64GB (IG...		IGP-64	800.00	300	0.0	240,000.00	0.00
iGuava connector (IGC...		IGC...	0.00	300	0.0	0.00	0.00

Summary of totals:

- Total discount: (USD) 0.00
- Sub total: (USD) 240,000.00
- Total taxes: (USD) 0.00
- Shipping: (USD) 0.00
- Order total: (USD) 240,000.00

The "Get AvaTax" button is highlighted with a red box and is disabled, with the text "Sales tax not required." displayed next to it. Other buttons at the bottom include "Save & Close", "Apply", "Refresh", "Delete", "Cancel", "< Previous", "Next >", and "Back To List".

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.

The screenshot shows a CRM application window titled "Order: 5/8/2015 - ABC Architect - Pivotal CRM - Smart Client Framework". The interface includes a menu bar (File, View, Shortcuts, Tools, Help), a navigation pane on the left with sections like "Order actions", "Interactions", "Run an existing...", and "Shortcuts", and a main content area. The main content area is titled "Order: 5/8/2015 - ABC Architect Company" and contains several sections: "Order information" (P.O. #: test, Date: 5/8/2015, Status: Invoiced), "Account management" (Account manager: Sam Ample), and "Links" (Quote: 5/8/2015 - 39,999.00 - ABC Opportu..., Opportunity: ABC Opportunity 50 Units - ABC Archit...). Below these is a "Details" section with tabs for "Payment", "Billing", "Shipping", and "AvaTax". The "AvaTax" tab is active and displays a table of products and a summary of tax-related amounts. A red box highlights the "Commit AvaTax" button, which is disabled and accompanied by the text "Tax Commit service has been disabled." The bottom of the window features a toolbar with buttons for "Save & Close", "Apply", "Refresh", "Delete", "Cancel", "< Previous", "Next >", and "Back To List". The status bar at the bottom indicates "0 Messages", "User: CRM/Administrator", and "Environment: DEMO/DEMO".

Product	Package	Code	Unit Price (USD)	Qty	Discount %	Extended Price (USD)	Tax (USD)
Guava connector (IGC...		IGC...	0.00	100	0.0	0.00	0.00
Guava classic - 64GB (...)		IGC-64	399.99	100	0.0	39,999.00	3,599.92

Total discount: (USD) 0.00
Sub total: (USD) 39,999.00
Total taxes: (USD) 3,599.92
Shipping: (USD) 0.00
Order total: (USD) 43,598.92

Commit AvaTax Tax Commit service has been disabled.

Step 6. AvaTax not enabled

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

The screenshot shows a CRM application window titled "Order: 5/11/2015 - Santa Rosa Interior Design". The interface includes a navigation menu on the left with sections like "Order actions", "Interactions", "Run an existing...", "Shortcuts", and "Create a new...". The main content area is divided into several panels:

- Order information:** Fields for P.O. #, Date (5/11/2015), Status (Ordered), Currency (USD), and Shipped on.
- Account management:** Fields for Account manager (Cathy Green), Partner company, and Partner contact.
- Links:** Fields for Quote (5/11/2015 - 200,000.00 - Bok Q4 Feb) and Opportunity (Bok Q4 Feb TV Opportunity - Santa Ro).
- Details:** A sub-tabbed section with "AvaTax" selected. It contains a table of order items and a summary of costs.

Product	Package	Code	Unit Price (USD)	Qty	Discount %	Extended Price (USD)	Tax (USD)
Iguava TV (ITV)		ITV	200.00	1,000	0.0	200,000.00	0.00

Summary of costs:

- Total discount: (USD) 0.00
- Sub total: (USD) 200,000.00
- Total taxes: (USD) 0.00
- Shipping: (USD) 0.00
- Order total: (USD) 200,000.00

In the "AvaTax" section, there is a "Get AvaTax" button that is disabled and has a red border. Next to it is the text "Tax service has been disabled." Below the details section are buttons for "Save & Close", "Apply", "Refresh", "Delete", "Cancel", "< Previous", "Next >", and "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.

The screenshot displays a CRM application window titled "Order: 3/2/2015 - ABC Architect - Pivotal CRM - Smart Client Framework". The interface includes a menu bar (File, View, Shortcuts, Tools, Help), a search bar, and a navigation pane on the left with sections like "Order actions", "Interactions", "Run an existing...", "Shortcuts", and "Create a new...".

The main content area is titled "Order: 3/2/2015 - ABC Architect Company" and contains several sections:

- Order information:** P.O. #: 77383645, Currency: USD, Date: 3/2/2015, Status: Ordered, Required: (empty), Ship via: (empty), Shipped on: (empty), Tracking: (empty).
- Account management:** Account manager: Jane Atkinson, Partner company: (empty), Partner contact: (empty).
- Links:** Quote: 3/2/2015 - 300,000.00 - New ABC Op, Opportunity: New ABC Opportunity - ABC Architect.
- Details:** Payment, Billing, Shipping, AvaTax.
- Bill to:** Company: ABC Architect Company - Los Angeles, Contact: John Black.
- Billing address:** Attention: John Black, Address: 504 Crowe Farm Rd, City: Waeterloo, State: IL, Zip/PC: 62298, Country: United States, Phone: +1 (310) 555-1000, Ext: 1121.

A red box highlights the "Validate Address" button and the text "Bill To Address Invalid" next to it. At the bottom of the form, there are buttons for "Save & Close", "Apply", "Refresh", "Delete", "Cancel", "< Previous", "Next >", and "Back To List". The status bar at the bottom shows "0 Messages", "User: CRM/Administrator", and "Environment: DEMO/DEMO".