

AvaTax Setup

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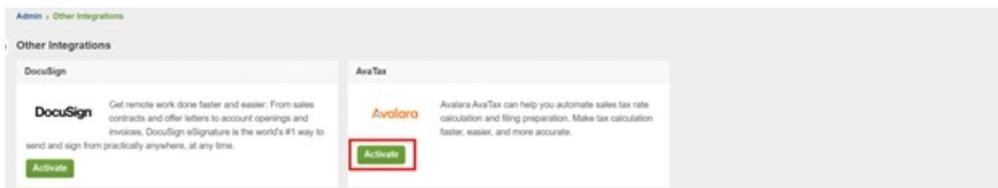
AvaTax Setup

There are three steps to properly set up AvaTax integration with Order Time

- [AvaTax Settings](#)
- [Company Preferences](#)
- [QuickBooks Desktop Users](#)

AvaTax Settings

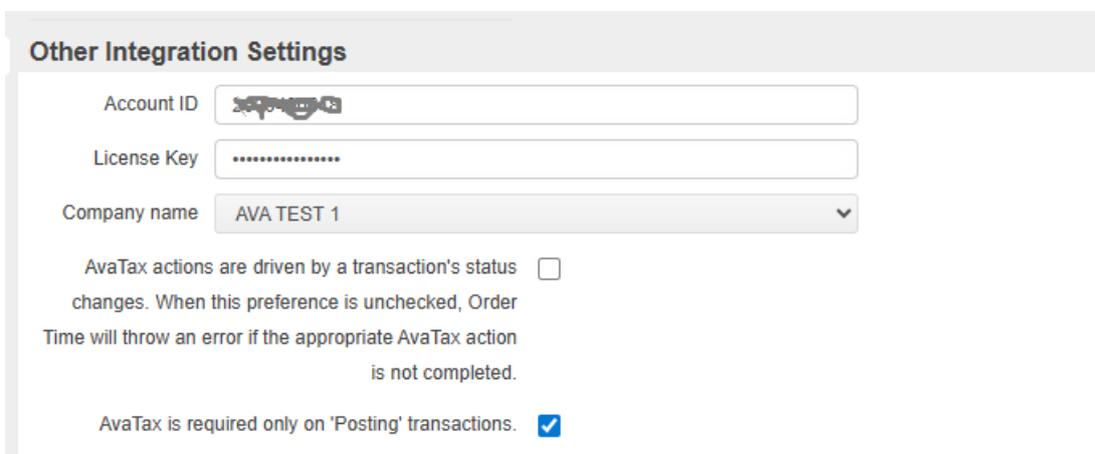
In order to integrate with AvaTax, go to [Admin=>Other Integrations](#) then click the Activate button.



In the next screen enter your AvaTax Account ID and License Key then click the Test Connection button.



You should now see the following:

A screenshot of the 'Other Integration Settings' form. It contains the following fields and options:

- Account ID: [input field]
- License Key: [input field with masked characters]
- Company name: [dropdown menu showing 'AVA TEST 1']
- AvaTax actions are driven by a transaction's status changes. When this preference is unchecked, Order Time will throw an error if the appropriate AvaTax action is not completed. [checkbox, unchecked]
- AvaTax is required only on 'Posting' transactions. [checkbox, checked]

- Company name: Select the company from list of companies created in the AvaTax Portal.
- AvaTax actions are driven by a transaction's status: You will see later on that there is a menu item for AvaTax which can be used to perform the AvaTax actions. We do recommend

that this preference is checked so that Status changes can perform the AvaTax actions. If it's unchecked, and a particular AvaTax action is not completed, then an error message will appear.

- AvaTax is required only on 'Posting' transactions. AvaTax is available on Quotes, Sales Orders, Ship Docs and Customer Returns. Only Ship Docs and Customer Returns are 'Posting' transaction. Posting means they affect AvaTax reporting. When this is checked, Order Time will NOT throw an error if a quote or sales order when an AvaTax action is not completed.

Company Preferences

Navigate to [Admin => Company Preferences](#) and click Sales. Check 'Calculate tax rates based on zip codes instead of Item Sales Tax'

The screenshot shows the 'Company Preferences' interface with the 'Sales - Advanced' tab selected. The 'Calculate tax rates based on zip codes instead of Item Sales Tax' checkbox is checked and highlighted with a red box. Other visible settings include 'Limit items for selling to items that have an item # listed for the current customer', 'Use last customer price (ignores pricing levels)', 'When adding items to sales documents show all price level pricing, including price levels assigned to other customers.', 'Move attachments from quote to sales order on conversion.', 'Copy attachments from sales order to ship doc', 'Apply price levels to Kit selections.', 'When using the Price Level type 'Customer Item by Percentage', apply the currency exchange rate.', 'Enable generating vendor RFQs from quotes.', 'Require Ship Method.', 'Show kit selections on sales orders and quotes.', 'When changing the customer on a sales order or quote, DO NOT re-price all the items.', 'When printing a form template with styles, show the variants as rows instead of in matrix format.', 'Enable creating a transfer from a sales order.', 'Transferring from a sales order is used for consignment.', 'Use sales order promise dates on linked work orders.', 'Days to add to a Sales Order and Quote Promise Date' set to 2, 'Default Location' set to HQ, 'Enable Location lookup based on Shipping Regions', 'Highlight line items with inventory deficiencies', and 'Enable charging additional fees on orders'.

QuickBooks Desktop Users

Create Item Sales Tax

If using QuickBooks Desktop integration, the user will need to set up a zero-rated Item Sales Tax. We use this item sales tax in QBD in order for the Order Time tax amount to be used. Some customers will already have this.

To create a new Item Sales Tax, navigate to [Admin => Profile List => Item Sales Tax](#).

Admin > Profile Lists > Item Sales Tax

Item Sales Tax Save Reset

Active Status
 Active Inactive Both

Records +
 AraTax +
 Total Records: 1

AraTax

Name: AraTax
 Type: Single
 Active:
 Tax Rate: 0 %
 Vendor: 1000Subs
 Description:

Adjust Accounting Integration Settings

Navigate to **Admin => Accounting integration** and click the Configure button. Select the Item Sales Tax created or existing in the step above then click Save.

Admin > Accounting Integration > Integration Settings

Accounting Integration Settings

Items Customers **Invoices** Vendors Company Schedule

General

Post Ship Doc when Status is: Shipped
 Post Customer Return when Status is: Returned

Use Ship Doc's Date as Invoice Date (by default Ship Doc's Posting Date is used)

Select an item sales tax with a 0% rate to be assigned to the main item sales tax area of the invoice posted to QuickBooks: AraTax

Invoice No Preference

Set by QuickBooks
 Ship Doc No
 Customer PO
 SO No
 Tracking No
 Custom Field

Payment

Do not post payments from Order Time to Accounting
 Default payment method used when applying credits to invoices:
 Do not sync payments from Accounting to Order Time

Mapping - Header

Order Time Field	Accounting Field	Action