AvaTax Setup

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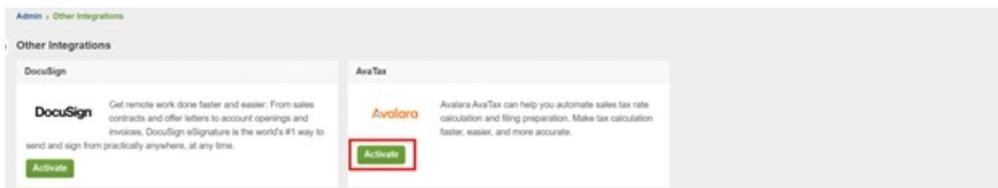
AvaTax Setup

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

- AvaTax Settings
- Company Preferences
- QuickBooks Desktop Users

AvaTax Settings

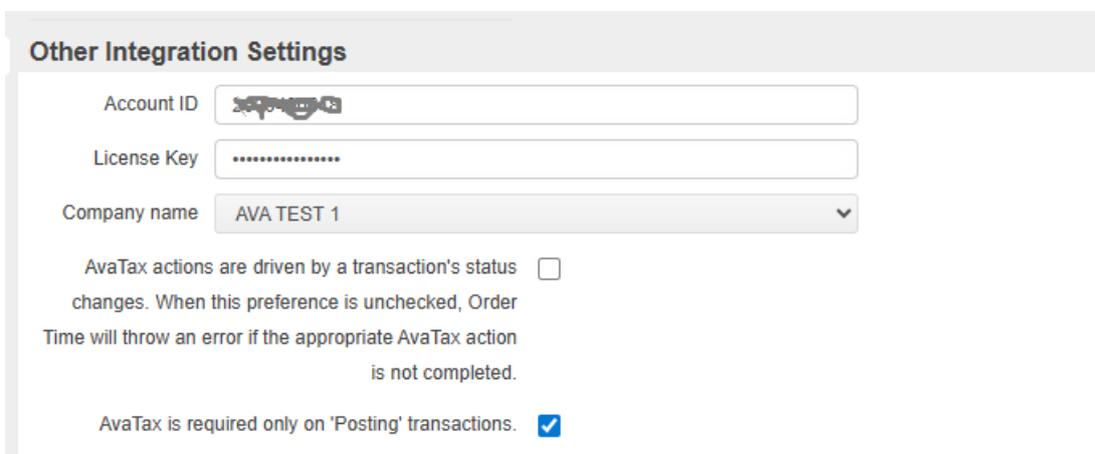In order to integrate with AvaTax, go to Admin=>Other Integrations then click the Activate button.

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

You should now see the following:

- 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'

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.

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.