



AVALARA APPLICATION BY MOZU

Configuration Guide

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Avalara Application by Mozu Configuration Guide

Welcome to Avalara and Mozu

[Avalara](#) is a leading provider of tax calculation logic, sales tax returns, and services for small to large businesses conducting ecommerce transactions. Their leading product AvaTax aids thousands of companies with tax decision automation, accurately calculating the sales tax at local, state, and international levels including tax exemption and reseller certificates, tax processes, and file and remit returns.

[Mozu](#) offers an app to integrate your Avalara account and services to perform all sales tax and return calculations for every shopping cart and submitted order. The AvaTax services integrates through this app with Mozu to provide seamless tax calculation support for all aspects of your business.

Install the Avalara Application by Mozu on Your Tenant

After purchasing the Avalara Application by Mozu, call your sales or professional services representative and request installation on your tenant. Mozu staff will install the app to your tenant, making it available for further configuration and usage in your storefront.

This application includes two types of functionality:

- Address validation
- Tax calculation based on rules you set in Avalara

CONFIGURATION REQUIREMENTS

To configure Avalara to work seamlessly with Mozu, you need specific items installed and settings provided. This guide details each step from requirements to final configuration for calculating taxes on orders.

You must meet the following criteria to configure the Avalara Application by Mozu:

- You must have the Avalara Application by Mozu installed into your tenant.
- You must have an active AvaTax account with Avalara.
- You must create and configure your company information in the AvaTax system.

Note: You configure both address validation and tax configuration from the same dialog, so you do not need to configure each capability separately; however, you must enable each capability separately.

Configure the Application

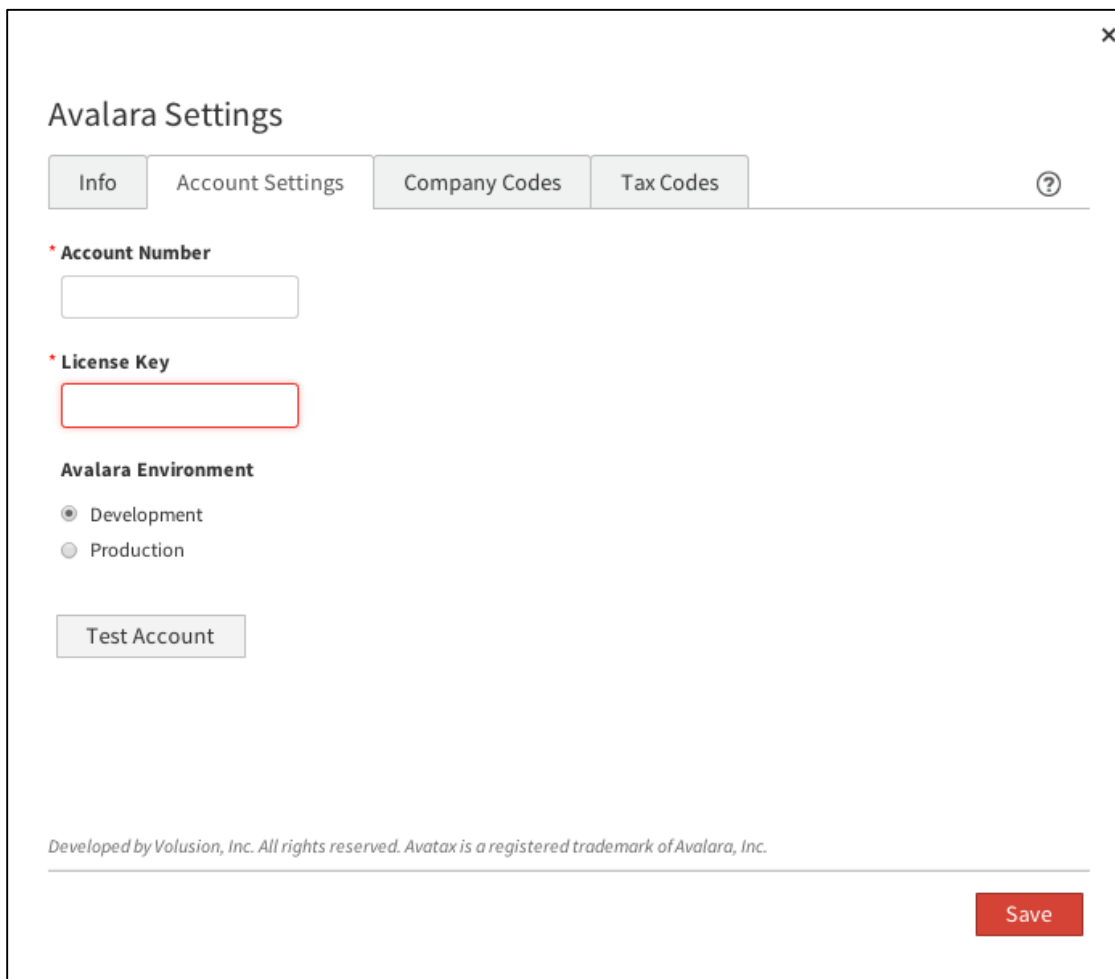
1. On the Mozu Admin top bar, select **Settings > Applications**.
2. Double-click **Avalara Tax Calculator and Address Validator**.

3. Select Shipping Country as **US**.
4. Click **Configuration**.

Note: The first time you launch the configuration screen, it behaves as a wizard, walking you through the different tabs in the order they need to be configured. After the initial configuration, you can freely navigate through the tabs to set specific information.

CONFIGURE ACCOUNT SETTINGS

1. On the Account Settings tab, enter your Avalara account number and license key. You receive this information from Avalara.
2. Select the environment to use. Use Development if you are testing your account in the Avalara sandbox. Use Production for live tax calculations.
3. Click **Test Account** to ensure you can successfully connect to your Avalara account from Mozu and that there are no errors in your credentials.
4. Click **Save** to commit your changes.



The screenshot shows the 'Avalara Settings' dialog box. It has a title bar with a close button (X). Below the title, there are four tabs: 'Info', 'Account Settings', 'Company Codes', and 'Tax Codes'. The 'Account Settings' tab is selected. Below the tabs, there are two required fields: '* Account Number' and '* License Key', both with empty text boxes. Below these fields is the 'Avalara Environment' section with two radio buttons: 'Development' (selected) and 'Production'. Below the radio buttons is a 'Test Account' button. At the bottom right, there is a red 'Save' button. At the bottom left, there is a small footer text: 'Developed by Volusion, Inc. All rights reserved. Avatax is a registered trademark of Avalara, Inc.'

CONFIGURE COMPANY CODES

1. In the Company Codes tab, map your tenant and sites to the corresponding company code or codes that you have defined in Avalara.

Note: The application automatically populates the Company Codes tab with the sites available in your tenant. You can select different company codes for each level so that different sites log tax transactions to different company names in Avalara. You must have at least one company code that maps to a tenant or a site.

2. When you are done mapping, click **Verify Company Codes** to ensure the information you entered into the Mozu application matches the information you have stored in Avalara. Names must be an exact match; otherwise, the application returns an error.

×

Avalara Settings

Info

Account Settings

Company Codes

Tax Codes

?

Name	Type	Company Code
ImportExport_R5Testing	Tenant	VCompanyTest
SeismicVersion17Testing_Site_1_1_1	Site	Site Company code
Basic Store Site_1	Site	Site Company code

Verify Company Codes

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Save

CONFIGURE TAX CODES

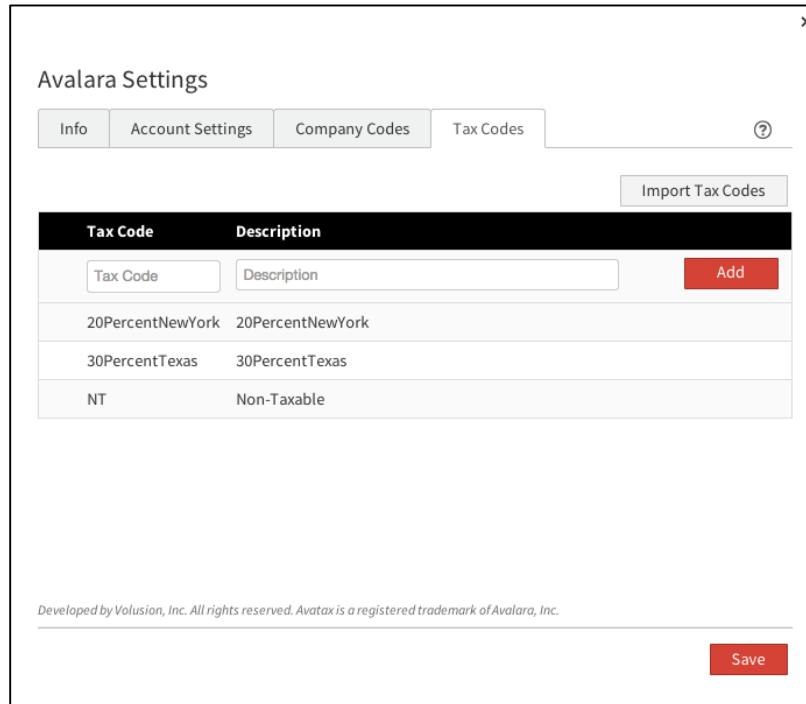
Tax Code is a required field for products, so you must select a code for every new product you configure. Tax codes are available in a pull-down menu in your Product configuration page. One company code can have multiple tax codes. You can enter tax codes individually, but Mozu recommends importing your tax code information from Avalara.

IMPORT TAX CODES

1. In Avalara, export your tax codes. You must format the exported file with each Tax Code and Description separated by a Tab stop character.
2. Click **Import** in the Tax Codes dialog.
3. Click **Save** to commit your changes. **Caution:** Deleting entries from the Tax Code grid is only available *before* saving your settings. Once you save, you cannot edit or delete existing Tax code entries.

MANUALLY ADD TAX CODES

1. Enter your tax code and description.
2. Click Add.
3. Click **Save** to commit your changes. **Caution:** Deleting entries from the Tax Code grid is only available *before* saving your settings. Once you save, you cannot edit or delete existing Tax code entries.



Avalara Settings

Info Account Settings Company Codes Tax Codes ?

Import Tax Codes

Tax Code	Description
<input type="text" value="Tax Code"/>	<input type="text" value="Description"/>
20PercentNewYork	20PercentNewYork
30PercentTexas	30PercentTexas
NT	Non-Taxable

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Save

SELECT STATES IN MOZU

To ensure all taxes are calculated correctly with the addition of AvaTax and this app, you should also select the taxable states in Mozu.

1. On the Mozu Admin top bar, select **Settings > Tax**.
2. **Tax Exempt** should not be checked.
3. Select one or more states to apply tax from the drop-down menu. You can use shift and control keys to select groups or specific states. The states selected should match your configured taxes in Avalara app by Mozu.
4. As you select states, they display in the section. To remove a state, click the X button for each state.
5. Click **Save**.

Enable Avalara Application by Mozu

1. On the Mozu Admin top bar, select **Settings > Applications**.
2. Double-click **Avalara**.
3. Click **Enable App** on the Avalara page.