AVALARA APPLICATION BY MOZU

Configuration Guide

Table of Contents

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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.
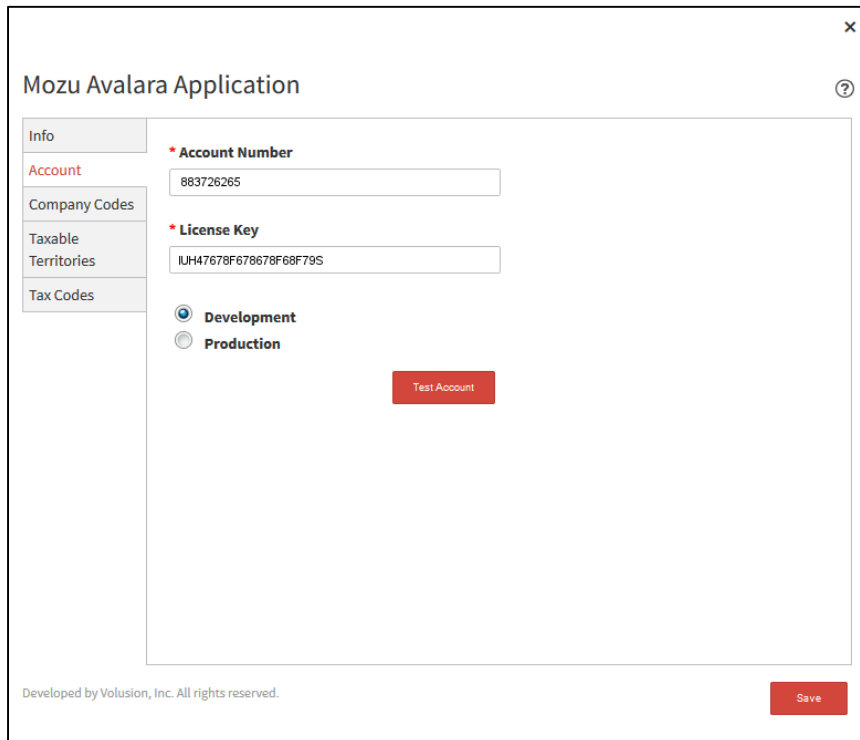
Configure the Application

You must configure the app to initialize and enable Avalara for working in Mozu.

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.**

CONFIGURE ACCOUNT SETTINGS

You must enter your Avalara account and license information to initialize and connect Mozu and Avalara for sharing data.

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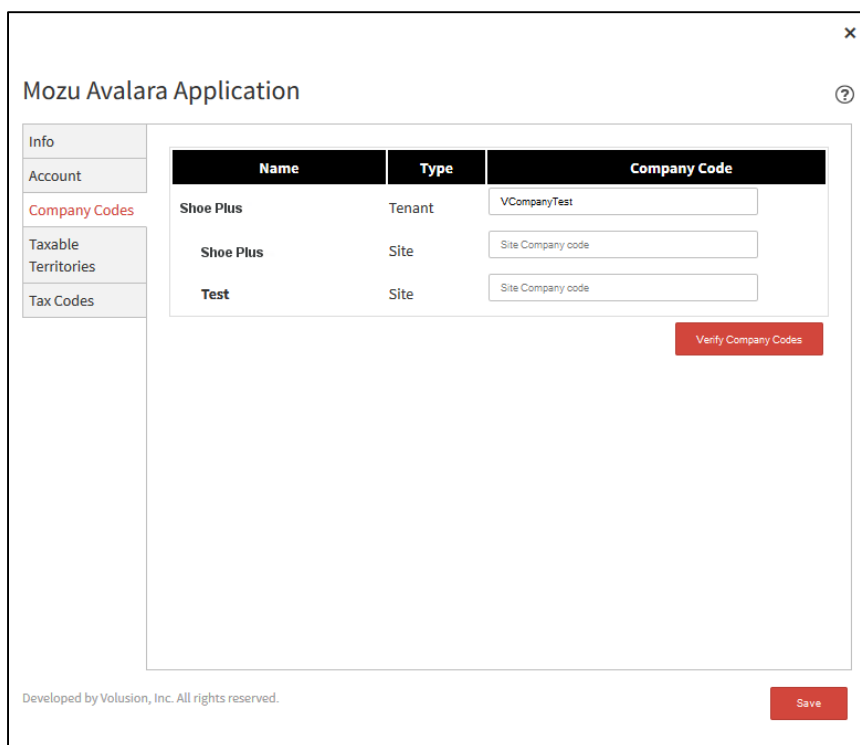5. Click **Save** to commit your changes.

CONFIGURE COMPANY CODES

The Company Codes tab allows you to map your tenant and sites to corresponding company codes defined in your Avalara account.

The app automatically populates the 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.

1. Click the **Company Codes** tab.
2. The Name column displays each tenant with the associated sites in Mozu, as marked in the Type column.
3. Enter an Avalara code in the Company Code column per tenant/site as needed. If the names do not exactly match, the application returns an error.
4. 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.
5. Click **Save**.
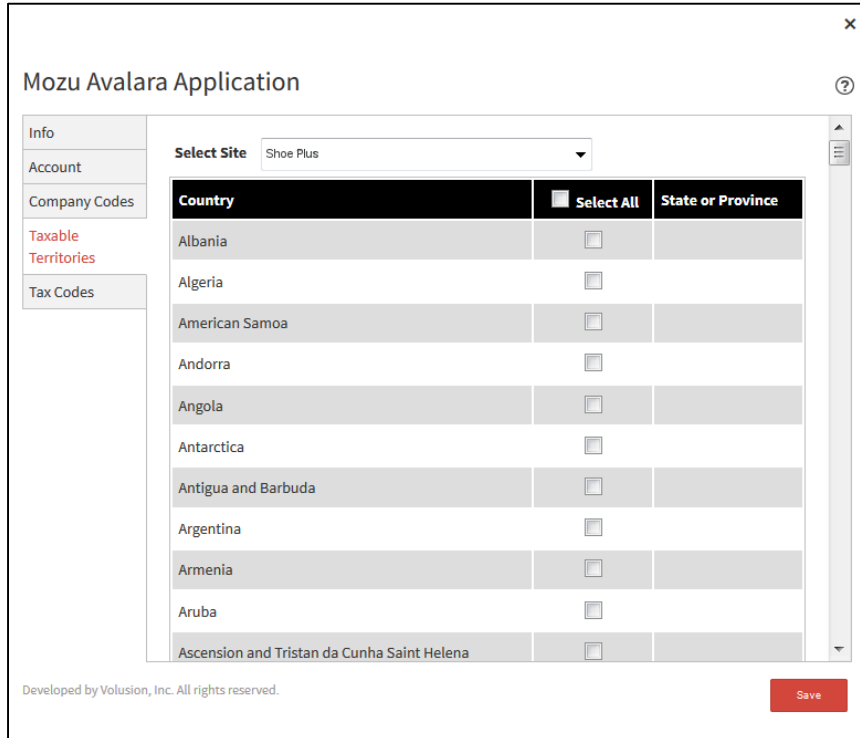
CONFIGURE TAXABLE TERRITORIES

You can select countries/nations for taxable purchases through the Taxable Territories tab. Each territory may include states and provinces, displayed in the table. These territories can be set as taxable per Mozu site, associated through the company code associations made between Mozu and Avalara.

1. Click the **Taxable Territories** tab.
2. Select a Mozu site from the drop-down menu.
3. Select checkboxes per territory you want to set as taxable for purchases.
4. Click **Verify Company Codes** to have Avalara validate the associations and configurations in Avalara to support the selections made.
5. Click **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 the **Tax Codes** tab.
3. Click **Import**.
4. 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 ALL TAX CODES

1. Click the **Tax Codes** tab.
2. Enter a **Shipping Taxcode**.
3. Enter a **Handling Free Taxcode**.
4. For Product Tax Codes, enter a **Tax Code** and **Description**. Click **Add**. Repeat for every tax code you need to add.
5. 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.

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.