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Avalara logo>

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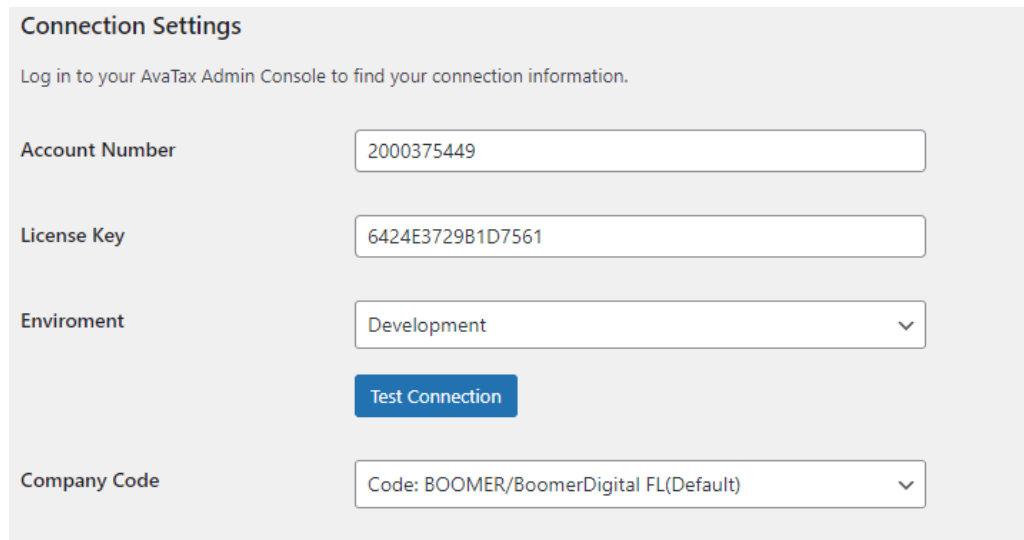
Avalara AvaTax for [My Application]

Configuration/User Guide

Avalara AvaTax is a cloud-based solution automating transaction tax calculations and the tax filing process. Avalara provides real-time tax calculation using tax content from more than 12,000 US taxing jurisdictions and over 200 countries, ensuring your transaction tax is calculated based on the most current tax rules.

Connect to AvaTax

After installing the AvaTax integration you need to configure the integration

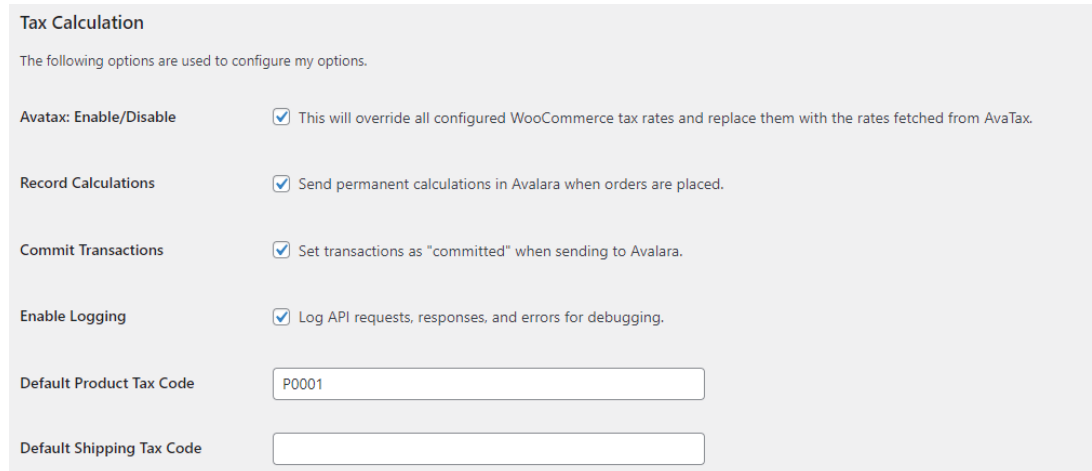


The screenshot shows a 'Connection Settings' form. At the top, it says 'Log in to your AvaTax Admin Console to find your connection information.' Below this are four input fields: 'Account Number' with the value '2000375449', 'License Key' with the value '6424E3729B1D7561', 'Environment' with a dropdown menu showing 'Development', and 'Company Code' with a dropdown menu showing 'Code: BOOMER/BoomerDigital FL(Default)'. A blue 'Test Connection' button is located below the 'Environment' dropdown.

1. Go to [woocommerce] >[Settings] > [Tax]>[Custom Avatax]
2. Enter your Avalara AvaTax Credentials:
 - **Account Number:** Provided during your AvaTax account activation process.
 - **License Key:** Provided during your AvaTax account activation process
 - **Environment:** Environment to connect Development or Production AvaTax services
 - **Company Code/ID:** Company profile identifier in the AvaTax Admin Console.
3. Click the **Test Connect button**.
4. If the connection is successful, it will show a message “Account verify successfully.”

Configure Avalara AvaTax

Once connected, you see additional settings.

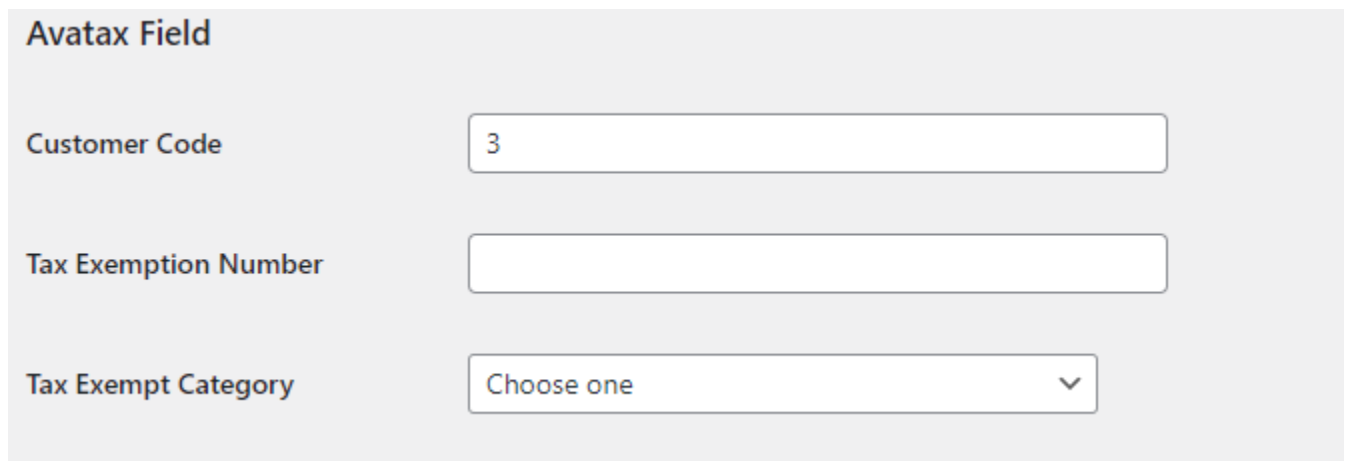


The screenshot shows the 'Tax Calculation' settings page. At the top, it says 'The following options are used to configure my options.' Below this are several settings:

- Avatax: Enable/Disable**: A checkbox that is checked. The description says: 'This will override all configured WooCommerce tax rates and replace them with the rates fetched from AvaTax.'
- Record Calculations**: A checkbox that is checked. The description says: 'Send permanent calculations in Avalara when orders are placed.'
- Commit Transactions**: A checkbox that is checked. The description says: 'Set transactions as "committed" when sending to Avalara.'
- Enable Logging**: A checkbox that is checked. The description says: 'Log API requests, responses, and errors for debugging.'
- Default Product Tax Code**: A text input field containing 'P0001'.
- Default Shipping Tax Code**: An empty text input field.

- **Avatax:Enable/Disable** - Turn off the AvaTax calculation service.
- **Record Calculation** – Enables tax document submission to Avalara’s AvaTax service for record keeping.
- **Commit Transactions** - With this setting enabled, transactions will be posted and committed to the AvaTax Admin Console.
- **Default Shipping Tax Code** – The default Avalara AvaTax System Tax code used for Freight/Shipping.
- **Enable Logging** – Log detailed transaction activity for troubleshooting purposes. Enable only when instructed by support.
- **Link to AvaTax Admin Console** – Access the Avalara AvaTax Admin Console
- **[Address Validation]** – Option to enable or disable address validation]
- **[Address Validation Supported Countries]** – choose which countries will be used for Address Validation]

Assign an Avalara tax exempt category to a customer



The screenshot shows the 'Avatax Field' form. It has three fields:

- Customer Code**: A text input field containing '3'.
- Tax Exemption Number**: An empty text input field.
- Tax Exempt Category**: A dropdown menu with 'Choose one' and a downward arrow.

1. Click [Woocommerce]>[Customers] > [Customer Listing]
2. Click a customer record to enter the customer detail

- In the [Tax Exemption Number] field, enter the customer's exemption number.
- In the [Tax Exempt Category] field, select the appropriate customer type letter code.

A - Federal government (United States)

B - State government (United States)

C - Tribe / Status Indian / Indian Band (both)

D - Foreign diplomat (both)

E - Charitable or benevolent org (both)

F - Religious or educational org (both)

G - Resale (both)

H - Commercial agricultural production (both)

I - Industrial production / manufacturer (both)

J - Direct pay permit (United States)

K - Direct mail (United States)

L - Other (both)

M - Not Used

N - Local government (United States)

O - Not Used

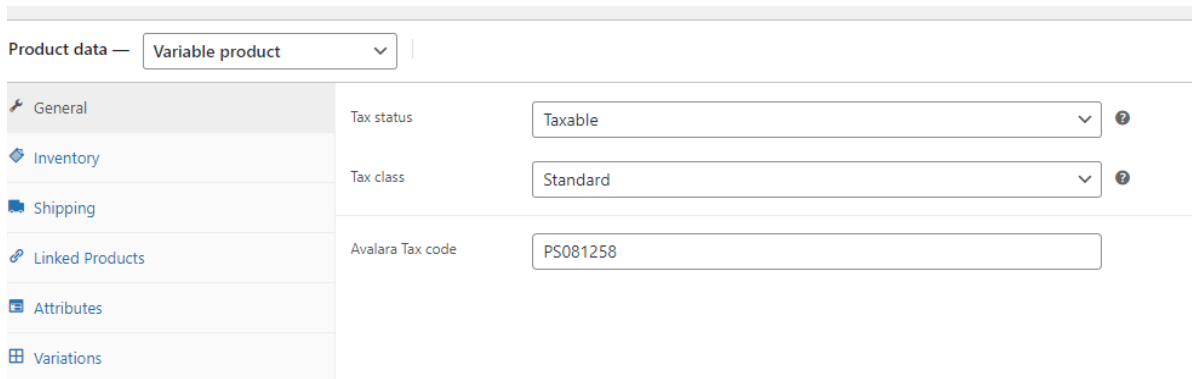
P - Commercial aquaculture (Canada)

Q - Commercial Fishery (Canada)

R - Non-resident (Canada)

3. Click **Save**.

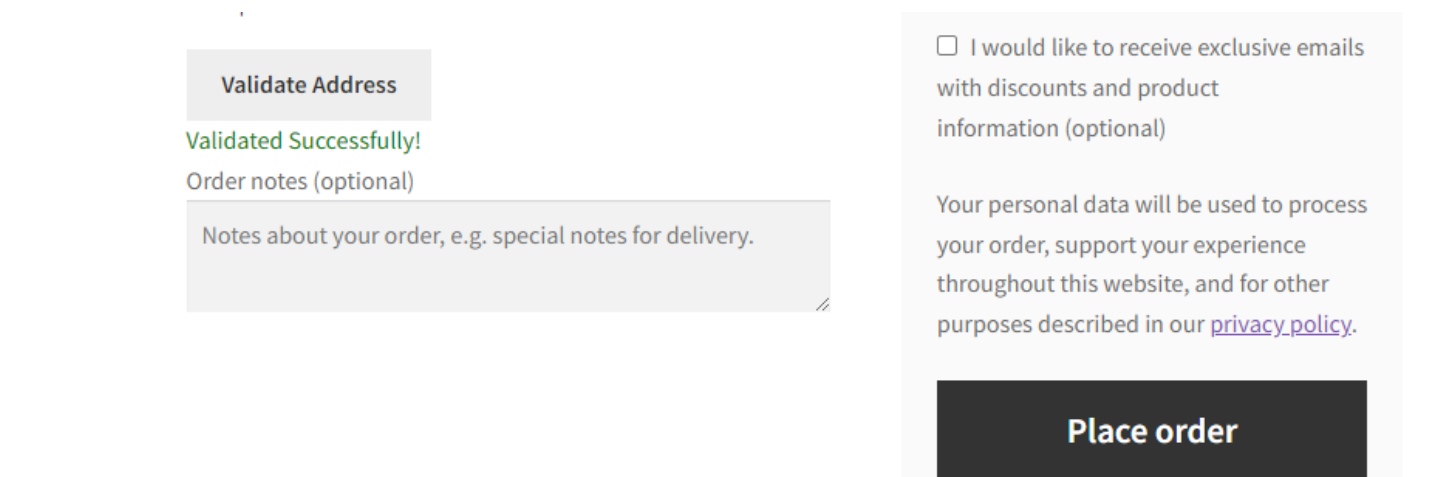
Assign an AvaTax System Tax Code to an item



The screenshot shows a 'Product data' section with a dropdown menu set to 'Variable product'. Below this is a sidebar with navigation links: General, Inventory, Shipping, Linked Products, Attributes, and Variations. The main content area displays three fields: 'Tax status' set to 'Taxable', 'Tax class' set to 'Standard', and 'Avalara Tax code' set to 'PS081258'. Each of the first two fields has a help icon (question mark) to its right.

1. Go to [Products] > [All Products]
2. Select a Product to open the Product details screen.
3. Click [Edit]
4. On the Product details screen, enter the applicable AvaTax System Tax Code in the [Tax Code] field.
5. Click **Save**.
6. To see a listing of all available AvaTax System tax codes, click (<http://taxcode.avatax.avalara.com>).

Validate a customer address



The screenshot shows a checkout page with a 'Validate Address' button. Below the button, a green message reads 'Validated Successfully!'. Underneath is a section for 'Order notes (optional)' with a text area containing the placeholder 'Notes about your order, e.g. special notes for delivery.' To the right of the address validation section is a checkbox labeled 'I would like to receive exclusive emails with discounts and product information (optional)'. Below the checkbox, a paragraph states: 'Your personal data will be used to process your order, support your experience throughout this website, and for other purposes described in our [privacy policy](#).' At the bottom right of this section is a large black button labeled 'Place order'.

1. in Checkout page user must click on validate address
2. if the address is validated successfully will show a message "Validated Successfully!"