

SF-Snapshots

As during demo customer/product exemption were not working as expected (because of configuration issues on Avalara side) , now issue is fixed as configuration got set correctly in Avalara. Following are some snapshots for various scenarios:

When customer exemption is enabled :

Customer tax exemption enabled through tax provider custom meta data

Tax Provider

Tax Provider Edit

Save

Save & New

Cancel

Information

Label

Avalara

Tax Provider Name

Avalara

Taxation Policy

Net

Company Code

DCM

Customer Code

ABC

Transaction Type

CreateTransaction

Document Type

SalesInvoice

Commit?

☐

Shipping Items Taxable?

☐

Customer Tax Exemption?

☒

Product Tax Exemption?

☐

Consider product tax codes?

☐

Default Shipping Tax Code

FR

Default Product Tax Code

P0000000

Protected Component

☐

Namespace Prefix

Context Name

R1Training

Context Locale

en_US

Address Line1

1214 Hidden Rdg

Address Line2

City

Irving

State

TX

Zip Code

75035

Country Code

US

Impl Class

AvalaraTaxProvider

Service

Avalara Tax Calc Service

Save

Save & New

Cancel

No tax displayed on storefront -

Free Shipping on Orders Over \$200

alpine group

Home

Products

Contact Information

mtyagi@pixelmedia.com

+12142142145

Shipping

Main Shipping Address

415 Mission St

San Francisco, CA 94105

United States

Delivery Options

Free Shipping 7-10 Days (Flat Rate)

Shipping 2-3 Days (Flat Rate)

Overnight Shipping

FedEx Ground*

FedEx Express Saver*

FedEx 2Day*

FedEx Priority Overnight*

FedEx First Overnight*

Enter keyword

Order Details

Subtotal

\$581.97

Shipping

\$5.00

Tax

\$0.00

Total

\$586.97

Place Order

No tax calculated in Avalara

Sales invoice: 9adb68a7-2d30-475e-ba84-2b2c6a65f51d

[Edit document details](#)

Invoice detail			Additional info			Customer info		
DOCUMENT CODE	9adb68a7-2d30-475e-ba84-2b2c6a65f51d		EXEMPTION APPLIED	No		ENTITY USE CODE	Direct Pay	
STATUS	Uncommitted		IMPORTER OF RECORD?	No		CUSTOMER CODE	ABC	
DOCUMENT DATE	04/11/2024		INVOICE CURRENCY	USD		CUSTOMER EXEMPT NUMBER	EF-12345	
TAX DATE	04/11/2024		DISCOUNT	0				
COMPANY	Docmotion LLC							

Origin and destination addresses are included in line items

	AMOUNT	DISCOUNT	NOT TAXED	TAXABLE	TAXES/FEES	TOTAL
Tax summary	581.97	0.00	581.97	0.00	0.00	581.97

Line items

[+ Add a line item](#) [% Calculate tax](#)

TAX DETAILS	LINE	ITEM CODE	DESCRIPTION	QTY	AMOUNT	DISCOUNT	NOT TAXED	TAXABLE	TAXES/FEES	TOTAL	
	1	0a9Hh0000001D0uAM	CR-DEC	1	31.98	0.00	31.98	0.00	0.00	31.98	edit delete
	2	0a9Hh0000001D09AM	B-C-COFMAC-001	1	549.99	0.00	549.99	0.00	0.00	549.99	edit delete

When product exemption is enabled :

Product tax exemption enabled through tax provider custom meta data

Tax Provider

Tax Provider Edit [Save](#) [Save & New](#) [Cancel](#)

Information

Label:

Tax Provider Name:

Taxation Policy:

Company Code:

Customer Code:

Transaction Type:

Document Type:

Commit? ☐

Shipping Name Taxable? ☐

Customer Tax Exemption? ☐

Product Tax Exemption? ☒

Consider product tax codes? ☐

Default Shipping Tax Code:

Default Product Tax Code:

Protected Component: ☐

Namespace Prefix:

Contact Name:

Context Locale:

Address Line1:

City:

State:

Zip Code:

Country Code:

Impl Class:

Service:

[Save](#) [Save & New](#) [Cancel](#)

Tax Provider - Salesforce - Developer Edition

Following product is configured as Non-taxable & has exemption code & entity use code configured

Product

Bella Chrome Coffee Machine (Sample) [New Contact](#) [New Opportunity](#) [New Case](#)

Product Code: B-C-COFMAC-001 Product Family: Commercial

Details **Media** **Translations** **Related** **Variations** **Stores** **SEO**

Product Name: Bella Chrome Coffee Machine (Sample)

Product Class: Simple

Product Code: B-C-COFMAC-001

Product Currency: USD - U.S. Dollar

Weight: 100

Tax Class Id:

Taxable? ☐

Exemption Code: EF-12345

Entity Use Code: J - Direct Pay

Product Description: The ultimate in coffee making luxury. Create up to three gourmet coffees at the same time. Granular control of the froth and foaminess. Can create a coffee in under 60 minutes

System Information

Created By: Manoj Tyagi, 1/29/2024, 9:48 AM

Last Modified By: Manoj Tyagi, 4/5/2024, 10:37 AM

Related List Quick Links

- Child Components (0)
- Categories (2)
- Commerce Entitlement Policies (2)
- Price Books (3)
- Product Selling Model Options (0)

Here product , in cart

Free Shipping on Orders Over \$200

Home Products

Lauren

Cart (2 items) [Clear Cart](#)

Date Added - Newest First

Summary

Bella Chrome Coffee Machine (Sample)

SKU# B-C-COFMAC-001

Product Code: B-C-COFMAC-001

Description: The ultimate in coffee making luxury. Create up to three gourmet coffees at the same time. Granular control of the froth and foaminess. Can create a coffee in under 60 minutes

\$549.99/item

\$549.99

-

1

+

Delete

Costa Rican Decaf Roast Bean Bag (Sample)

SKU# CR-DEC

Product Code: CR-DEC

Description: A water processed decaf that is vivid and packed with flavor, Costa Rican Decaf is made from 100% organic water processed decaffeinated beans. The Decaf is surprisingly (some say freakishly) versatile: about the only preparation we don't see consistently enjoyable results in is the siphon.

\$15.99/item

\$15.99

\$22.49

-

1

+

Delete

Subtotal

\$565.98

Shipping

\$0.00

Tax

\$0.00

Total

\$565.98

Enter a coupon code

Checkout

For same line item tax not calculated in Avalara as it is marked as tax exempt.

TRANSACTIONS | DOCMATION LLC [Switch company](#)

Sales invoice: 3da438bf-5496-458b-961a-b9cd500fdf29 [Edit document details](#)

Invoice detail

DOCUMENT CODE 3da438bf-5496-458b-961a-b9cd500fdf29

STATUS Unsubmitted

DOCUMENT DATE 04/11/2024

TAX DATE 04/11/2024

COMPANY Docmation LLC

Additional info

EXEMPTION APPLIED No

IMPORTER OF RECORD? No

INVOICE CURRENCY USD

DISCOUNT 0

Customer info

ENTITY USE CODE None

CUSTOMER CODE ABC

Origin and destination addresses are included in line items

	AMOUNT	DISCOUNT	NOT TAXED	TAXABLE	TAXES/FEES	TOTAL
Tax summary	\$65.98	0.00	\$49.99	15.99	1.38	\$67.36

Line items

[Add a line item](#) [% Calculate tax](#)

TAX DETAILS	LINE	ITEM CODE	DESCRIPTION	QTY	AMOUNT	DISCOUNT	NOT TAXED	TAXABLE	TAXES/FEES	TOTAL	
	0a9Hn0000001D0aIAM	CR-DEC		1	15.99	0.00	0.00	15.99	1.38	17.37	
	0a9Hn0000001D09IAM	B-C-COFMAC-001		1	\$49.99	0.00	\$49.99	0.00	0.00	\$49.99	

0a9Hn0000001D09IAM

B-C-COFMAC-001

1

\$49.99

0.00

\$49.99

0.00

0.00

\$49.99

TAX CODE P0000000

ENTITY USE CODE Direct Pay

CUSTOMER EXEMPT NUMBER EF-12345

SHIP FROM 1214 Hidden Rdg Irving, TX 75038-7276 US (latitude: 32.879763, longitude: -96.968996)

SHIP TO 415 Mission St San Francisco, CA 94105-2533 US (latitude: 37.789761, longitude: -122.39742)

Use Tax

[Review this calculation](#)

Are you collecting tax here?

Yes

Is your customer taxable?

Yes

Is the product or service taxable?

No