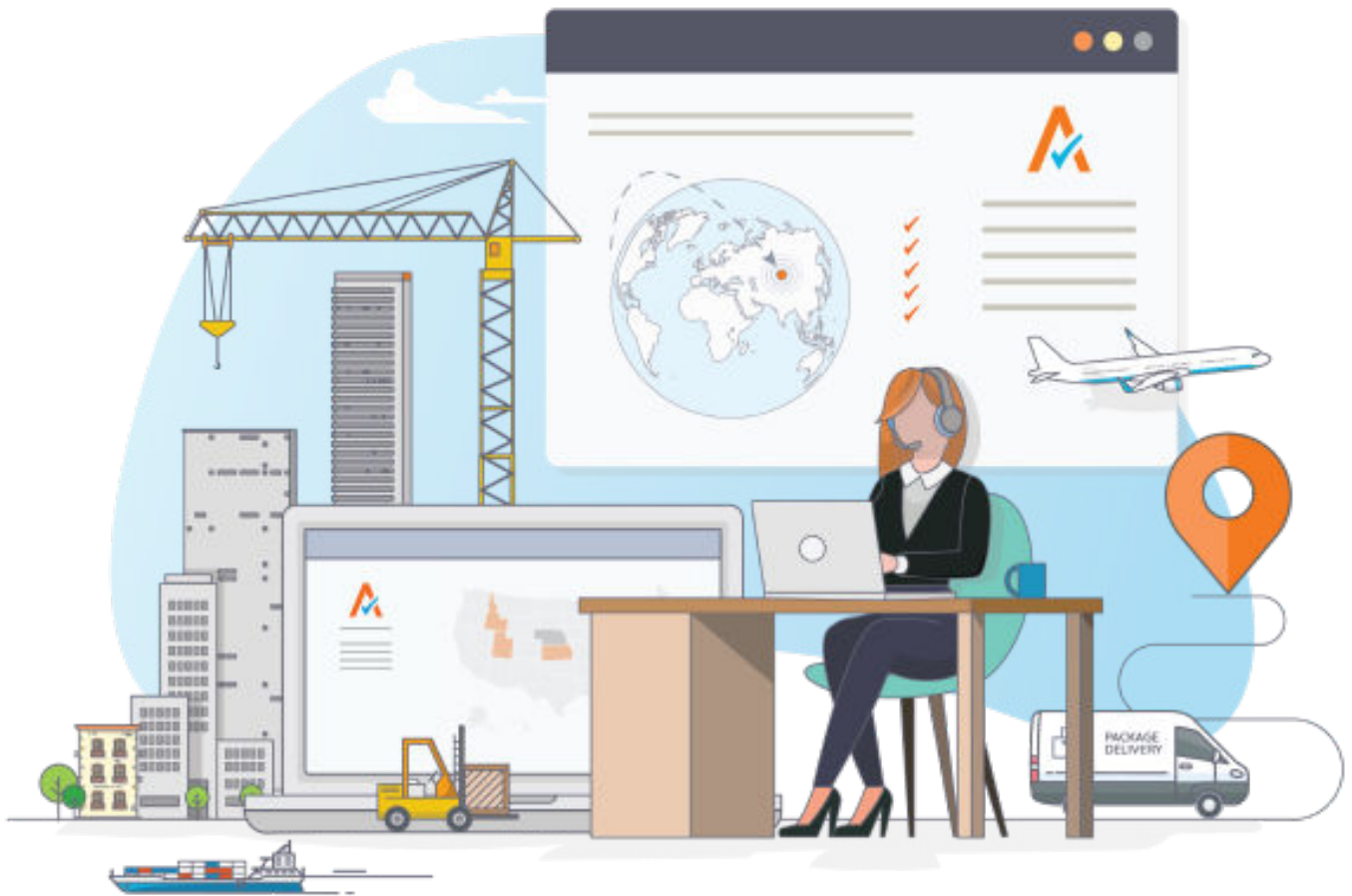




Avalara for Adobe Commerce



11 September 2024

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Avalara for Adobe Commerce overview

Learn about the Avalara for Adobe Commerce connector.

Avalara for Adobe Commerce connects Avalara AvaTax with your existing business system and helps you automate tax compliance.

Avalara for Adobe Commerce supports the following tax types:

- Sales tax
- VAT

If your company uses AvaTax for tax calculation and an Avalara connector for connecting AvaTax to your business application, we recommend you to visit the following links:

- If you're new to this connector, install and configure your connector. See [Instructions for setting up Avalara for Adobe Commerce](#).
- If you have already installed this connector, see [Calculate tax using Adobe Commerce storefront](#).
- If you need to configure the AvaTax settings for tax calculation, see [Use AvaTax for Avalara connectors](#).

More information

To access the latest release information, see [Avalara for Adobe Commerce Release Notes](#).

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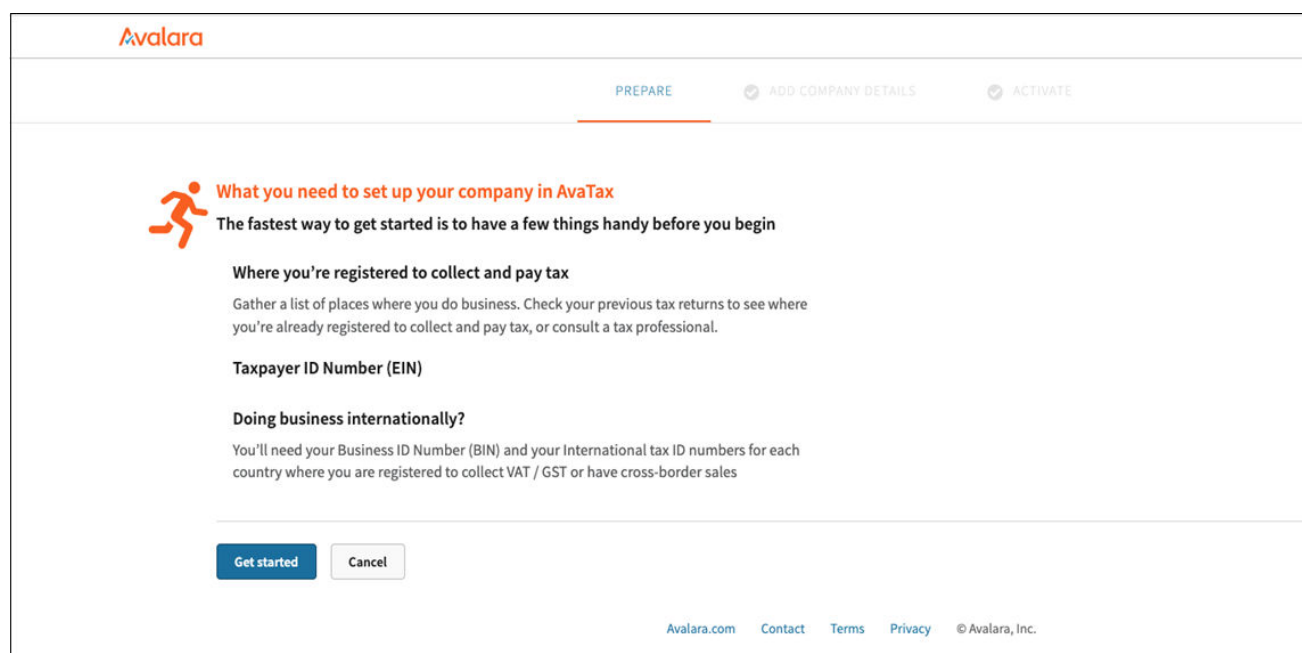
Instructions for setting up Avalara for Adobe Commerce

Choose setting up Avalara for Adobe Commerce depending on your subscription model.

Based on your subscription model, once you sign in to your Avalara AvaTax account, the landing page differs.

Option 1

If you see the following landing page or Avalara Home, then see [Set up Avalara for Adobe Commerce](#) to install and configure your connector.

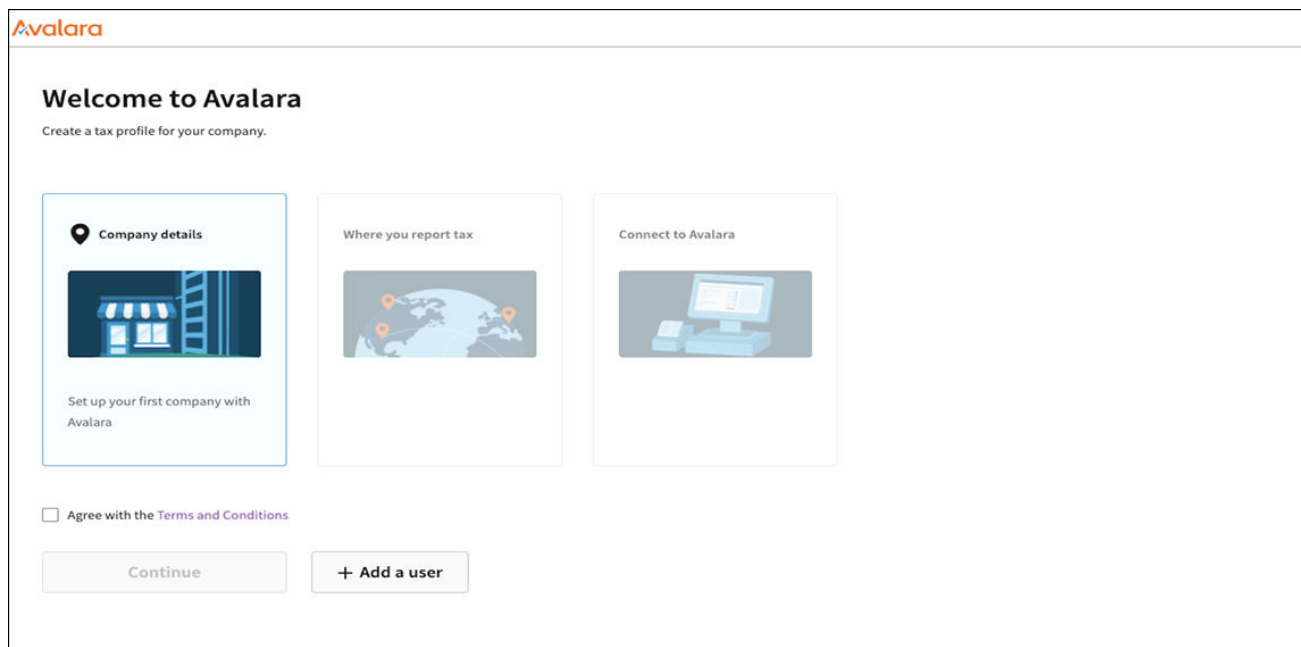


The screenshot shows the Avalara AvaTax landing page. At the top, there is a navigation bar with the Avalara logo and three tabs: "PREPARE" (active), "ADD COMPANY DETAILS", and "ACTIVATE". Below the navigation bar, there is a section titled "What you need to set up your company in AvaTax" with a running person icon. The text states: "The fastest way to get started is to have a few things handy before you begin". Below this, there are three sections: "Where you're registered to collect and pay tax" (with instructions to gather a list of places and check previous tax returns), "Taxpayer ID Number (EIN)", and "Doing business internationally?" (with instructions to provide Business ID Number (BIN) and International tax ID numbers). At the bottom, there are two buttons: "Get started" (blue) and "Cancel" (gray). The footer contains links for "Avalara.com", "Contact", "Terms", "Privacy", and "© Avalara, Inc."

Option 2

If you see the following landing page, then see [Set up Avalara for Adobe Commerce via AvaTax Onboarding](#) to install and configure your connector.


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Avalara

Welcome to Avalara

Create a tax profile for your company.




Company details




Set up your first company with Avalara

Where you report tax



Connect to Avalara



☐ Agree with the [Terms and Conditions](#)

[Continue](#) [+ Add a user](#)

Set up Avalara for Adobe Commerce

Install the Avalara for Adobe Commerce extension, connect it to Avalara, and set up your extension.

Before you begin

- Ensure you have your Adobe Commerce administrator account with your store set up on it.
- Ensure that you've set up your basic company profile in AvaTax. If you haven't created a company profile in Avalara, create one now.
- A license key is specific and unique to your account, and it's required to connect most integrations to Avalara. If you have both a production and a sandbox account, you need a license key for each account.

About this task

Get your Avalara for Adobe Commerce extension from the Adobe Commerce marketplace and install it. Connect your Adobe Commerce store to your Avalara account and set up your extension to calculate taxes depending on your business requirements.

Steps

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1. [Install Avalara for Adobe Commerce](#)

Complete the required prerequisites and install the Avalara for Adobe Commerce extension.

2. [Connect Adobe Commerce with Avalara](#)

Enable the extension and connect your Adobe Commerce store to your production or sandbox account in Avalara.

3. [Configure advanced settings in Avalara](#)

Set up your extension in using the Advanced settings available in Avalara.

4. [Configure settings in Adobe Commerce](#)

Set up your extension using the settings in the Adobe Commerce admin console.

5. [Fine-tune your company profile in AvaTax](#)

After you create an initial company profile and connect your system to Avalara, you may want to make further adjustments depending on the products and services you sell and where they're sold.

6. [Send a test transaction from your business application.](#)

After you connect your business application to Avalara, send a few test transactions to make sure the connection is working and to verify different business scenarios and workflows.

[Create a basic company profile](#)

[Generate license key](#)

Install Avalara for Adobe Commerce

Complete all the prerequisites and install the Avalara for Adobe Commerce extension from the Adobe Commerce marketplace.

Before you begin

- Adobe Commerce 2.4.5 or higher Community or Enterprise versions installed. The connector supports all Adobe Commerce version supported by Adobe.
- Adobe Commerce running on a server with the following:
 - No existing Avalara Adobe Commerce extensions
 - Appropriately configured CRON job
 - PHP CURL extensions (required by the AvaTax library)
- Ensure that you've set up your basic company profile in AvaTax. If you haven't created a company profile in Avalara, create one now.
- A license key is specific and unique to your account, and it's required to connect most integrations to Avalara. If you have both a production and a sandbox account, you need a license key for each account.

About this task

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We recommend installing the connector using Composer. Make sure that an experienced Adobe Commerce developer performs the Installation. The following installation instructions assume the same:

Steps

1. Purchase Avalara for Adobe Commerce on the Adobe Commerce marketplace:
 - a. Sign in to your Adobe Commerce marketplace account and search for AvaTax.
 - b. On the AvaTax extension page, select the appropriate **Edition** and **Your store version**.
Example: Adobe Commerce (on-prem) and 2.4 Adobe Commerce (on-prem)
 - c. Select **Add to cart**.
 - d. Enter your payment and billing information, and then select **Place Order**.
The Install page appears.
 - e. Select **Install**.
The AvaTax extension page appears with the installation instructions.
2. Copy the access keys:
 - a. Under How to Install, select the **My Profile - Access Keys** link.
 - b. Copy the access keys to the `auth.json` file inside your Adobe Commerce project.
3. Go to the command prompt where you've installed your Adobe Commerce environment and run the following commands:
 - a. Run the following command to enable the maintenance mode:
`bin/magento maintenance:enable`
 - b. Run the composer command to download the extension code and all the dependent libraries in the Adobe Commerce codebase:
`composer require avalara/avatax-magento:<avaTax_extension_version>`
 - c. Enable the AvaTax module:
`bin/magento module:enable --clear-static-content Avalara_AvaTax`
 - d. Enable the BaseProvider module:
`bin/magento module:enable --clear-static-content Avalara_BaseProvider`
 - e. Run the setup script and add the latest version number to the table:
`bin/magento setup:upgrade`
 - f. Compile the DI configuration and generate precompiled code:
`bin/magento setup:di:compile`
 - g. Write static files to the Adobe Commerce file system:
`bin/magento setup:static-content:deploy`
 - h. Install Adobe Commerce cron:
`bin/magento cron:install`
 - i. Start and run AvaTax cron:

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- ```
bin/magento cron:run --group avatax_queue
```
- j. Start and run BaseProvider cron:  
`bin/magento cron:run --group baseprovider`
  - k. Clear Adobe Commerce cache:  
`bin/magento cache:flush`
  - l. Run this command to disable the maintenance mode:  
`bin/magento maintenance:disable`

**Note**

If you're deploying the extension to a production environment, follow:

<https://experienceleague.adobe.com/docs/commerce-operations/performance-best-practices/deployment-flow.html>.

## Connect Adobe Commerce with Avalara

Connect your Adobe Commerce store to your development or production account in Avalara.

### About this task

After installing the extension, connect your Adobe Commerce store to your development or production account in Avalara. The extension fetches the configuration related to your account and connects to your default company in Avalara. You're ready to start calculating taxes for the transactions on the selected account.

**Note**

If you're connecting from Avalara Onboarding, you can connect only to your production account in Avalara.

## Steps

1. Sign in to the Adobe Commerce admin console.
2. Go to **Stores** and under **AvaTax Configuration**, select **Configure**.  
You can also access the extension configuration from **Stores > Configuration > Sales > Tax**.

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The **AvaTax Extension Version** displays the AvaTax version that you're connecting. It's useful for debugging purposes in the case of errors.

3. Enter your **Account ID** and **License Key** for the Avalara account that you want to connect. If you're unable to find your license key, select the **Learn how you can get a new license** link for help.
4. Select **Connect to Sandbox** or **Connect to Production** depending on the credentials that you've used.

- **Sandbox:** Uses test or sandbox environment to set up and perform test transactions.
- **Production:** Uses the production environment for customer transactions.

If you aren't sure about selecting the correct environment, select the **Learn more about the Sandbox and Production accounts** link for help.

On connecting, you receive a success message reading that you've connected your Adobe Commerce store to your default company in Avalara, displaying the company name.

If you need to set up your Avalara account, select the **back to Avalara** link.

The extension connects your Adobe Commerce store to your default company in Avalara. It fetches your company, nexus, and tax information and enables the relevant settings by default. The extension also enables exemption certificate management, cross-border, and VAT depending on your Avalara configuration.

Once you connect successfully to your default company in Avalara, you can perform the following actions when required:

- Select **Disconnect** to disconnect the sandbox or production environment that you've connected to. You can disconnect from the existing account and connect again to your other Avalara sandbox or production account.
- Select **Update Connection** if you want to change the credentials for the same environment. Changing the credentials enables the **Update Connection** button.
- Select **Sync Configuration** if you want to synchronize any configuration changes in Avalara with Adobe Commerce immediately. Otherwise, it takes approximately 15 minutes to synchronize the changes automatically.

To configure your extension in Avalara according to your business needs, refer to [Configure advanced settings in Avalara](#).

To configure your extension or update the existing settings in Adobe Commerce according to your business needs, refer to [Configure settings in Adobe Commerce](#).



#### Note

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If you have enabled Product Sync and change your default company in AvaTax, then you need to update your connection or disconnect and connect again to sync products to the new default company.

## Configure advanced settings in Avalara

Configure your Avalara for Adobe Commerce advanced settings in Avalara.

### Before you begin

- Ensure you've connected to your Avalara account.
- Ensure you have Avalara administrator access to update the Advanced settings.

### About this task

You can update the advanced setting options for your company based on your business needs. However, each Advanced setting option comes with a default setting. You can continue with the default setting or change it if needed.

### Steps

1. From the Avalara **Home**, go to **Settings > Manage Integrations**.
2. Go to the **My integrations** tab and select **Manage settings** in the Adobe Commerce tile.



#### Note

In the My Integration tab, you can see multiple Adobe Commerce tiles if you have multiple integration companies and Avalara companies set up for your account.

There are separate tiles to access your global and store-level settings. The default tile has Integration Company as *Default Config*. Locate and select the setting you want to configure.

3. Select **Show all settings** to expand and view the different Advanced setting options.

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The advanced settings are categorized into the following sections for easy navigation and customization:

**Default or global settings:**

- [Product sync setting](#)
- [Error handling and timeout settings](#)

**Store-level settings:**

- [Tax calculation settings](#)
- [Validate addresses with Avalara setting](#)
- [Customer exemptions setting](#)
- [VAT ID setting](#)
- [Error handling and timeout settings](#)

4. Update the settings according to your business needs, and then select **Save**.



**Note**

After you update settings in Avalara, Avalara for Adobe Commerce automatically synchronizes the changes. It takes approximately 15 minutes to synchronize changes automatically. To immediately synchronize the updated settings between the connector and Avalara, use the **Sync Configuration** option on the Avalara configuration page in Adobe Commerce. This option ensures that updates sync immediately to prevent any transaction issues.

## Tax calculation settings


Learn about the different advanced settings that are available in Avalara.

Use this setting to configure tax calculation preferences for your Adobe Commerce store.


Table 1. Tax calculation settings in Avalara

| Field name   | Description                                                                                                                                                  |
|--------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Company name | This setting displays the name of your default Avalara company connected to your Adobe Commerce store, when you have a single company registered in Avalara. |


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| Field name                   | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                              | <p>If you have multiple companies registered in Avalara, the setting displays a dropdown to select your preferred company.</p> <p>All your transactions use this company address as the shipping address.</p> <div data-bbox="824 554 1528 1066">  <p><b>Note</b></p> <p>If you change the company, then the extension configuration gets updated with the configurations and subscriptions associated with the new company. Use the <b>Sync Configuration</b> option in the connector settings to reflect the updates immediately.</p> </div>                                                                                                                                                                                           |
| Taxation policy (store view) | <p>This setting allows you to select the taxation policy that you want to implement for your store. You can select whether you want your product prices to be tax-inclusive or tax-exclusive. Select from the following options:</p> <ul style="list-style-type: none"> <li>• <b>Net:</b> Included taxes are NOT part of the catalog price of the product and add separately to the subtotal.</li> </ul> <p>For example, if the catalog price of a product is \$100 and the tax rate is 10%, then you pay \$110 for the product. The seller gets \$100 as the catalog price is exclusive of the taxes and \$10 goes to the tax authorities.</p> <ul style="list-style-type: none"> <li>• <b>Gross:</b> Included taxes are part of the catalog price of the product and doesn't add separately to the subtotal.</li> </ul> |

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| Field name            | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|-----------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                       | <p>For example, if the catalog price of a product is \$100 and the tax rate is 10%, then you pay \$100 for the product. The seller gets \$90 as the catalog price is inclusive of the taxes and \$10 goes to the tax to the authorities.</p> <div data-bbox="824 516 1528 951">  <b>Note</b><br/><br/> You can configure the taxation policy as a one-time configuration when setting up the connector. Once you've configured the taxation policy, you can't change it again. </div>                                                                                                                                                                                                                                                                       |
| Tax mode (store view) | <p>This setting allows you to select the options to set up how you want to calculate taxes for your store:</p> <ul style="list-style-type: none"> <li>• <b>Disabled:</b> Uses native Adobe Commerce settings to estimate tax instead of Avalara. This doesn't submit transactions to Avalara.<br/><br/> You can use this option if you want to disable Avalara for a particular store. You can also use this option when you want to use only the address validation service without tax estimation.</li> <li>• <b>Estimate tax:</b> Uses Avalara to estimate tax during checkout, but doesn't submit the completed orders to Avalara.</li> <li>• <b>Estimate tax and submit transactions to Avalara (Default):</b> Uses Avalara to estimate tax during checkout, and submits invoices and credit memos to Avalara for reporting.</li> </ul> |
| <b>Data mapping</b>   |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |

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| Field name                                                                      | Description                                                                                                                                                                                                                                                                                                    |
|---------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Shipping tax code (store view)                                                  | This setting allows you to enter the default shipping tax code that's applicable to transactions that are without a shipping tax code. By default, Avalara assigns the shipping tax code for a third-party common carrier (FR) if you don't enter a value.                                                     |
| Calculate tax on adjustment refund and adjustment fee with Avalara (store view) | Turn on to calculate taxes for adjustment fees and refunds using Avalara. <div>  <b>Note</b><br/><br/>           Adobe Commerce doesn't calculate taxes for adjustment refunds and adjustment fees by default.         </div> |

## Validate addresses with Avalara setting

Learn about the address validation setting in Avalara for your transactions.

Use this setting to enable the address validation feature for your shipping or billing addresses using the Avalara address validation services.

This setting is available if you have configured Avalara nexus for Canada and the US only.



### Note

If you've set up any other country in addition to the U.S. and Canada in Avalara nexus, this setting will be unavailable.

Table 1. Address validation setting in Avalara

| Field name                      | Description                                                                                   |
|---------------------------------|-----------------------------------------------------------------------------------------------|
| Validate addresses (store view) | Turn on to enable admins and store customers to validate and correct addresses for the US and |

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| Field name | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|            | <p>Canada transactions on the Adobe Commerce admin console and store.</p> <p>The extension validates, corrects, and formats addresses according to the USPS and Canada Post database.</p> <p>Storefront customers can validate their shipping or billing addresses for their orders. Adobe Commerce admins can also validate addresses for the orders created from Adobe Commerce.</p> <p>When validating addresses, you can select between the address you've entered and the address that the extension suggests after validation.</p> |

### Related tasks

- [Validate addresses using the Adobe Commerce storefront](#)
- [Validate addresses using the Adobe Commerce admin console](#)

## Customer exemptions setting

Learn about the customer exemptions setting in Avalara for your transactions.

Use this setting to enable store customers and admins to add, manage, and invalidate exemption certificates. To use this, you also need to enable exemption certificate management in your Avalara account.



### Note

This setting is available only to registered Adobe Commerce customers with an active ECM Essentials, ECM Pro, or ECM Premium subscription. Avalara supports Exemption Certificate Management for the United States and Canada only.

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Table 1. Customer exemptions setting in Avalara

| Field name                                 | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|--------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Enable exemption certificates (store view) | <p>Turn <b>On</b> to enable customers and admins to add and manage tax certificates at the time of order checkout. This also enables customers to manage their certificates from the Adobe Commerce storefront.</p> <p>Enabling this displays an <b>Add certificate</b> link on the checkout page for customers to add certificates for their orders.</p> <p>This also enables Adobe Commerce admins to perform the following actions:</p> <ul style="list-style-type: none"> <li>• Add certificates for users</li> <li>• Invite customers to add certificates</li> <li>• View or invalidate a certificate for a user</li> </ul> <p>Storefront customers can also view and manage their exemption certificates from their storefront account settings.</p> |

### Related tasks

- [Manage tax certificates in the Adobe Commerce storefront](#)
- [Manage tax certificates in the Adobe Commerce admin console](#)
- [Invite customers to add exemption certificates](#)

### VAT ID setting

Learn about the business VAT ID setting in Avalara for cross-border transactions on your store.

Use this setting to enable your customers to input their business VAT ID. Customers need to add their VAT ID in their profile.



#### Note

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This setting is available only if you've set up any other country in the nexus in addition to the U.S. and Canada.

Table 1. VAT ID setting in Avalara

| Field name                   | Description                                                                                                                                                                                                       |
|------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Business VAT ID (store view) | Turn on by selecting <b>Yes</b> to use the Tax/VAT number value from customer record to calculate tax in Avalara. This also sends the customer VAT number as the Business identification number (BIN) to Avalara. |

## Error handling and timeout settings

Learn about the error handling and the API timeout settings in Avalara for your transactions.

## Logging settings

Use this setting to configure your extension to handle transaction errors, transaction requests, and responses.

If there's an error when Avalara estimates tax, then the extension uses Adobe Commerce tax rules.

Table 1. **Logging settings in Avalara**

| Field name                  | Description                                                                                                                                                                                                                                                                           |
|-----------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Database log level (global) | <p>This setting allows you to set the severity of the issue for the database log.</p> <p>The following options are available:</p> <ul style="list-style-type: none"> <li>• Debug</li> <li>• Info</li> <li>• Notice</li> <li>• Warning</li> <li>• Error</li> <li>• Critical</li> </ul> |

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| Field name                            | Description                                                                                                                                                                                                                                                                                                                                                                      |
|---------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                       | We recommend using the default value, Warning, for production use. You can change this value depending on your requirements.                                                                                                                                                                                                                                                     |
| Database log detail (global)          | <p>This setting allows you to set the level of detail that you want to see in the error logs.</p> <p>The following options are available:</p> <ul style="list-style-type: none"> <li>• Minimal</li> <li>• Normal</li> <li>• Extra</li> </ul> <p>We recommend using the default value, Minimal, for production use. You can change this value depending on your requirements.</p> |
| Database log record lifetime (global) | <p>This setting allows you to set the number of days before the logs autopurge.</p> <p>The default value is 180 days.</p>                                                                                                                                                                                                                                                        |
| Enable logging to file (global)       | <p>Turn on to save the logs to a file. Adobe Commerce stores the log file. This file is useful for troubleshooting purposes.</p> <p>We recommend using the database logs over file logs.</p>                                                                                                                                                                                     |
| File log level (global)               | <p>This setting allows you to set file log level depending on the severity of the issue.</p> <p>The following options are available:</p> <ul style="list-style-type: none"> <li>• Debug</li> </ul>                                                                                                                                                                               |

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| Field name               | Description                                                                                                                                                                                                                                                                                                                                                                    |
|--------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                          | <ul style="list-style-type: none"> <li>• Info</li> <li>• Notice</li> <li>• Warning</li> <li>• Error</li> <li>• Critical</li> </ul> <p>We recommend using the default value, Warning, for production use. You can change this value depending on your requirements.</p>                                                                                                         |
| File log detail (global) | <p>This setting allows you to set the level of detail that you want to see in the file logs.</p> <p>The following options are available:</p> <ul style="list-style-type: none"> <li>• Minimal</li> <li>• Normal</li> <li>• Extra</li> </ul> <p>We recommend using the default value, Normal, for production use. You can change this value depending on your requirements.</p> |

## Error handling settings

Use these settings to determine how you want to handle errors for the transactions on your Adobe Commerce store.

Table 2. **Error handling settings in Avalara**

| Field name                | Description                                                                                                                                                   |
|---------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Error action (store view) | <p>This setting allows you to set the error handling preference when there's an error calculating taxes using Avalara. Choose from the following options:</p> |

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| Field name                       | Description                                                                                                                                                                                                                                                                                                                                                                                                                        |
|----------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                  | <ul style="list-style-type: none"> <li>• <b>Disable checkout &amp; show error message:</b> Customers and admins can't place orders and the extension displays an error message.</li> <li>• <b>Allow checkout &amp; fall back to native Adobe Commerce tax calculation (no error message):</b> Customers and admins can still place orders and calculate taxes using the native Adobe Commerce tax calculation settings.</li> </ul> |
| Avalara API timeout (store view) | <p>This setting allows you to set the period that Adobe Commerce waits for Avalara servers to respond before initiating the error action that you've configured.</p> <p>The default setting is 60 seconds.</p>                                                                                                                                                                                                                     |

## Queue processing settings

Configure how you want to submit invoices to Avalara and handle queue processing errors.

Table 3. Queue processing settings in Avalara

| Field name                     | Description                                                                                                                                                                                                                                                                                                           |
|--------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Queue processing type (global) | <p>This setting allows you to set either individual or batch processing of the queue items as follows:</p> <ul style="list-style-type: none"> <li>• <b>Normal processing:</b> Processes each item in the queue separately.</li> </ul> <p>We don't recommend this for stores having a huge number of transactions.</p> |

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| Field name                                 | Description                                                                                                                                                                                                                                     |
|--------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                            | <ul style="list-style-type: none"> <li>• <b>Batch processing:</b> Processes the items in the queue in a batch of 1,000 items.</li> </ul>                                                                                                        |
| Enable queue admin notification (global)   | <p>Turn on to enable queue admin notifications.</p> <p>This displays a notification at the top of any admin page if there are pending queue records waiting for submission to Avalara with no attempts in the last 24 hours to submit them.</p> |
| Enable queue failure notification (global) | <p>Turn on to enable queue failure notifications.</p> <p>This displays a notification at the top of any admin page if there are transactions failed to submit to Avalara with no attempts to submit them in the last 24 hours.</p>              |

## Product sync setting

Learn about the product sync settings to sync your Adobe Commerce product catalog with Avalara.

Use this setting to synchronize the products catalog at Adobe Commerce with your currently configured company account in Avalara.




### Important

The product synchronization option is available only at the default-config or global level.

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Table 1. Product sync setting at global-level in Avalara

| Field name                              | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|-----------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Sync products with Avalara (store view) | <p>Turn on to sync your Adobe Commerce product catalog with the product catalog that you've configured in Avalara. This also synchronizes products for HS Codes depending on your cross-border configuration for the connector.</p> <p>This is a one-way product sync from Adobe Commerce to Avalara.</p> <div><div></div><div><p><b>Note</b></p><p>Product sync applies only to the default company that you've configured in your Avalara account. To sync products to a different company, change your default company in Avalara.</p><p>After changing the company, the product sync with the previous company stops. You need to disconnect and connect again to your Avalara account to start syncing with the new default company.</p></div></div> |

Related tasks

- [Sync products with Avalara manually](#)
- [View products sync status](#)

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## Configure settings in Adobe Commerce

Configure your Avalara for Adobe Commerce extension in Adobe Commerce depending on your business preferences.

### Before you begin

Ensure that you've connected to your Avalara account.

### About this task

You can update the advanced setting options for your company based on your business needs. However, each Advanced setting option comes with a default setting. You can continue with the default setting or change it if needed.

### Steps

1. In the Adobe Commerce admin console, go to **Stores > AvaTax Configuration > Configure > Advanced settings**.
2. Select the setting name to view the different Advanced setting options.  
The different advanced settings that are available in Adobe Commerce are:
  - [Tax calculation settings](#)
  - [Transactions outside of the U.S. setting](#)
3. Update the settings depending on your business needs and select **Save Config**.  
Apart from the settings on the connector page, the following Avalara settings are available under **Stores > AvaTax Classes**. You can configure these settings depending on your business needs.
  - [Customer tax classes](#)
  - [Product tax classes](#)
  - [Cross-border types](#)
  - [Cross-border classes](#)



#### Note

After you update settings in Avalara for Adobe Commerce and Avalara, the extension synchronizes the changes automatically. It takes approximately 15 minutes to synchronize the changes automatically. To immediately synchronize the updated settings between the connector and Avalara, use the **Sync Configuration** option on the configuration page in Adobe

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Commerce. This option ensures that updates sync immediately to prevent any transaction issues.

Tax calculation settings

Learn about the extension settings that are available in the Adobe Commerce admin console.

Use the tax calculation settings to configure the data mapping settings. You can continue with the default values or change according to your requirements.

Table 1. Data-mapping settings for tax calculation in Adobe Commerce

| Field name                        | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|-----------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Customer Code Format (store view) | <p>This setting allows you to configure the customer code format for customer identification in Avalara.</p> <p>This is the customer attribute from Adobe Commerce used for identifying customers in Avalara. It's a unique key for customer mapping at Avalara. The extension passes this attribute as a customer code to Avalara during transactions.</p> <p>The default value is ID. We recommend changing the default value only if you have specific requirements.</p> <div><div></div><div><p>Note</p><p>The customer code format must match with the customer exemption details in the ECM to apply the exemption.</p></div></div> |

| Field name                                 | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
|--------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| UPC Attribute To Use As Item Code (global) | <p>Select a UPC product attribute of Adobe Commerce to map it with the AvaTax Item Code field.</p> <p>To use a UPC product attribute as the AvaTax ItemCode, select which attribute maps to your UPC attribute. If a UPC attribute is present on a product record, is it's used as the AvaTax ItemCode and is prepended to the UPC. Otherwise, the product's SKUs are sent.</p> <p>Sending the UPC in the ItemCode field bypasses the Avalara Tax Code selection and mapping in your product record. The UPC, when sent in the ItemCode field, maps directly to the Avalara Product Tax Code. You don't have to map those codes separately.</p> <p>If you don't select a UPC attribute from this list, then by default, the Adobe Commerce product SKU is used as the AvaTax ItemCode in your transactions.</p> |

## Tax summary display settings

In addition to the tax calculation settings, you can set up tax summary display settings. The Adobe Commerce tax summary display settings show the tax summary in the shopping cart, orders, invoices, and credit memos. These settings display a complete tax summary breakup for an order amount.

Table 2. Adobe Commerce shopping cart display settings

| Field name                | Description                                                                      |
|---------------------------|----------------------------------------------------------------------------------|
| Display Full Tax Summary  | Displays the tax breakup summary in the shopping cart before you place an order. |
| Display Zero Tax Subtotal | Displays the zero tax subtotal in the shopping cart before you place an order.   |

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## Transactions outside of the U.S. setting

Learn about the transport settings for the VAT transactions on your store.

### Transactions outside of U.S.

Use this setting to configure the VAT transport to assign transport values for all enabled shipping methods.



#### Note

This option is available only if you have any other country configured in the nexus other than the U.S. and Canada.

Table 1. VAT transport settings for VAT transactions

| Field name                        | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
|-----------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Submit VAT Transport (store view) | <p>This setting allows you to add the shipping methods and transporter for VAT transactions.</p> <p><b>Add:</b> Adds a new row for the shipping method and transport settings for the VAT transactions on your store. You can add multiple transport settings for your store using various combinations of shipping methods and transport as applicable.</p> <p><b>Shipping method:</b> Displays a list of the shipping methods available in Adobe Commerce.</p> <p><b>Transport:</b> Specifies the transporter of the goods in a VAT transactions. The connector populates these values from the API. If you don't specify this value for a transport, then it uses Seller as the default value.</p> <p><b>Action:</b> Use the bin icon to delete a VAT transport setting.</p> |

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## Customer tax classes

Create or update a new customer tax class.

Use this setting to create or update a customer tax class.

A customer tax class name maps to an AvaTax Customer Usage Type or Entity Use Code to create a new customer tax class. You can create a new customer tax class and map it to a Customer Usage Type or Entity Use Code.

This setting is available in Adobe Commerce admin console at **Stores > AvaTax Classes > Customer Tax Classes**.

Table 1. Avalara settings to create or update a customer tax class

| Field name                 | Description                                                                                                                                               |
|----------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------|
| Create New Tax Class       | Displays the New Customer Tax Class page for creating a new customer tax class. You can also select <b>Edit</b> to update an existing customer tax class. |
| Class Name                 | The name of the customer tax class that you want to create.                                                                                               |
| AvaTax Customer Usage Type | The AvaTax Customer Usage Type or Entity Use Code. You can select that's applicable from the list.                                                        |
| Save Tax Class             | Saves the new customer tax class or updates an existing customer tax class with the given name and customer usage type.                                   |

After you create a customer tax class, you can assign this tax class to a customer group. You can then assign a customer to the customer group to use the entity use code for the customer transactions.

## Product tax classes

Create or update a product tax class to assign it to a product.

Use this setting to create or update a product tax class.

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Product tax class settings specify a class name and you need to map it to an AvaTax Tax Code to create a new product tax class. A product tax class mapped to the AvaTax Tax Code helps in accurately calculating the sales tax.

This setting is available at **Stores > AvaTax Classes > Product Tax Classes**.

Table 1. Avalara settings to create or update a product tax class

| Field name           | Description                                                                                                                                                                                                                                      |
|----------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Create New Tax Class | Displays the New Product Tax Class page for creating a new product tax class.<br><br>You can also select <b>Edit</b> to update an existing product tax class.                                                                                    |
| Class Name           | The name of the new product tax class that you want to create or update.                                                                                                                                                                         |
| AvaTax Tax Code      | Avalara system tax code or custom tax code.<br><br>This is an autolookup field. You can start typing in this field to search and select the Product Tax Code.<br><br>Products use the default tax code from AvaTax if you don't specify a value. |
| Save Tax Class       | Creates a new product tax class with the given tax code or updates an existing tax class.                                                                                                                                                        |

After you create a product tax class, you can assign it to a product to use the tax class in your transactions.

## Cross-border types

Create or update a cross-border type for your transactions outside the U.S.

Use this Avalara setting to create or update a cross-border type.

A product's cross-border type, combined with the destination country of a given transaction, determines the appropriate cross-border class that applies (including its HS Code and unit information).

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You can access this setting in the Adobe Commerce admin console at **Stores > AvaTax Classes > Cross Border Types**.

Table 1. Avalara setting for creating or updating a Cross-border type

| Field name                | Description                                                                                                                                                                    |
|---------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Add new Cross Border Type | Displays the Cross Border Type page for creating a new cross-border type.<br><br>You can also select <b>Edit</b> under <b>Actions</b> to update an existing cross-border type. |
| Type                      | The name of the cross-border type that you want to create or update.                                                                                                           |
| Save Cross Border Type    | Saves the cross-border type that you've created or updated.                                                                                                                    |

After you create a cross-border type, you can create a cross-border class with this cross-border type to assign it to a specific product.

## Cross-border classes

Create or update a cross-border class to assign the HS codes for your destination countries.

Use this setting to create or update a cross-border class. Cross-border classes allow you to configure the HS Codes you'll use, associating them with the appropriate destination countries and unit information.

This setting is available in the Adobe Commerce admin console at **Stores > AvaTax Classes > Cross Border Classes**.

Table 1. Avalara settings for creating or updating a cross-border class

| Field name            | Description                                                                                                |
|-----------------------|------------------------------------------------------------------------------------------------------------|
| Destination Countries | The destination countries that you can assign to the cross-border class that you want to create or update. |
| Cross Border Type     | A specific cross-border type assigned to a product.                                                        |

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| Field name              | Description                                                                                                                                                                                           |
|-------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                         | The cross-border type of a product combined with a destination country of a given transaction determines the appropriate cross-border class that applies (including its HS Code and unit information) |
| HS Code                 | Specifies the HS Code for your destination country and the cross-border type that applies to a product.                                                                                               |
| Pref. Program Indicator | Specifies the value of Pref. Program Indicator.                                                                                                                                                       |

## Set up Avalara for Adobe Commerce via AvaTax Onboarding

Install the Avalara for Adobe Commerce extension, connect it to Avalara, and set up your extension via AvaTax Onboarding.

### Before you begin

- Ensure you have your Adobe Commerce administrator account with your store set up on it.
- Ensure that you've set up your basic company profile in Avalara. For more information, see [Create a company](#).
- Ensure that you've specified where you collect tax. For more information, see [Inform us where you collect and pay tax](#).

### About this task

Install and set up your Avalara for Adobe Commerce extension from AvaTax Onboarding.

### Steps

1. [Install Avalara for Adobe Commerce via AvaTax Onboarding](#)  
Complete the required prerequisites and install the Avalara for Adobe Commerce extension.
2. [Connect Adobe Commerce with Avalara](#)  
Enable the extension and connect your Adobe Commerce store to your production or sandbox account in Avalara.
3. [Configure advanced settings in Avalara](#)  
Set up your Avalara extension using the settings available in AvaTax.

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#### 4. [Configure settings in Adobe Commerce](#)

Set up your extension using the settings available in the Adobe Commerce admin console.

#### 5. [Fine-tune your tax profile](#)

Complete any pending setup, such as adding a jurisdiction that you skipped previously or adding a local jurisdiction. Also, you can update the exemption, countries outside the US where you collect tax, and map your product and services to the Avalara tax code.

## Install Avalara for Adobe Commerce via AvaTax Onboarding

Install Avalara for Adobe Commerce as part of your AvaTax Onboarding journey.

### Before you begin

- Ensure that you've set up your basic company profile in Avalara. For more information, see [Create a company](#).
- Ensure that you've specified where you collect tax. For more information, see [Inform us where you collect and pay tax](#).
- Ensure that you have Adobe Commerce 2.4.5 or higher Community or Enterprise versions installed.
- Ensure that you have Adobe Commerce running on a server with the following:
  - No existing Avalara or AvaTax-Adobe Commerce extensions
  - Appropriately configured CRON job
  - PHP CURL extensions (required by AvaTax library)

### About this task

After you complete the first two AvaTax Onboarding steps, complete the final step by installing and connecting Avalara for Adobe Commerce.

### Steps

1. On the **Connect to Avalara** page, select **Connect**, and then select **Continue** to navigate to the business applications home page.  
The AvaTax extension page on the Adobe Commerce marketplace opens in a new window.
2. Purchase the Avalara for Adobe Commerce extension on the AvaTax extension page:
  - a. Sign in to your Adobe Commerce marketplace account.
  - b. On the AvaTax extension page, select the appropriate **Edition** and **Your store version**.  
**Example:** Adobe Commerce (on-prem) and 2.4 Adobe Commerce (on-prem)

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- c. Select **Add to cart**.
  - d. Enter your payment and billing information, and then select **Place Order**.  
The Install page appears.
  - e. Select **Install**.  
The AvaTax extension page appears with the installation instructions.
3. Copy the access keys:
    - a. Under **How to Install**, select the **My Profile - Access Keys** link.
    - b. Copy the access keys to the `auth.json` file available inside your Adobe Commerce project.
  4. Go to the command prompt where you've installed your Adobe Commerce environment and run the following commands:
    - a. Run the following command to enable the maintenance mode:  
`bin/magento maintenance:enable`
    - b. Run the composer command to download the extension code and all the dependent libraries in the Adobe Commerce codebase:  
`composer require avalara/avatax-magento:<avaTax_extension_version>`
    - c. Enable the AvaTax module:  
`bin/magento module:enable --clear-static-content Avalara_AvaTax`
    - d. Enable the BaseProvider module:  
`bin/magento module:enable --clear-static-content Avalara_BaseProvider`
    - e. Run the setup script and add the latest version number to the table:  
`bin/magento setup:upgrade`
    - f. Compile the DI configuration and generate a precompiled code:  
`bin/magento setup:di:compile`
    - g. Write static files to the Adobe Commerce file system:  
`bin/magento setup:static-content:deploy`
    - h. Install Adobe Commerce cron:  
`bin/magento cron:install`
    - i. Start and run AvaTax cron:  
`bin/magento cron:run --group avatax_queue`
    - j. Start and run BaseProvider cron:  
`bin/magento cron:run --group baseprovider`
    - k. Clear Adobe Commerce cache:  
`bin/magento cache:flush`
    - l. Run this command to disable the maintenance mode:  
`bin/magento maintenance:disable`



#### Note

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If you're deploying the extension to a production environment, follow:

<https://experienceleague.adobe.com/docs/commerce-operations/performance-best-practices/deployment-flow.html>.

## Upgrade to a higher version

Upgrade your Avalara for Adobe Commerce extension to a higher version.

### About this task

You can upgrade your Adobe Commerce extension to a higher or latest version depending on your business needs.

To check the latest version of the extension, refer to [Avalara for Adobe Commerce Release Notes](#).



#### Note

Avalara no more maintains the GitHub code for Avalara for Adobe Commerce from version 2.6.0 or later. If you're upgrading to version 2.6.0 or later, take a backup of the current *composer.lock*, remove it, and then run the composer update `avalara/avatax-magento:<avaTax_extension_version>` command.

## Steps

1. Go to the command prompt where you've installed your Adobe Commerce environment.
2. Run the following command to enable the maintenance mode:  
`bin/magento maintenance:enable`
3. Run the following composer update command with the upgrade version to download the extension code and all the dependent libraries in the Adobe Commerce codebase:  
`composer update avalara/avatax-magento:<avaTax_extension_version>`
4. Enable the AvaTax module:  
`bin/magento module:enable --clear-static-content Avalara_AvaTax`
5. Enable the BaseProvider module:

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```
bin/magento module:enable --clear-static-content Avalara_BaseProvider
```

6. Run the setup script and add the latest version number to the table:

```
bin/magento setup:upgrade
```

7. Compile the DI configuration and generate precompiled code:

```
bin/magento setup:di:compile
```

8. Write static files to the Adobe Commerce file system:

```
bin/magento setup:static-content:deploy
```

9. Install Adobe Commerce cron:

```
bin/magento cron:install
```

10. Start and run AvaTax cron:

```
bin/magento cron:run --group avatax_queue
```

11. Start and run BaseProvider cron:

```
bin/magento cron:run --group baseprovider
```

12. Clear Adobe Commerce cache:

```
bin/magento cache:flush
```

13. Run this command to disable the maintenance mode:

```
bin/magento maintenance:disable
```



#### Note

If you're deploying the extension to a production environment, follow:

<https://experienceleague.adobe.com/docs/commerce-operations/performance-best-practices/deployment-flow.html>.

# Calculate tax using Adobe Commerce storefront

## About this task

Add the products to the cart and provide the required shipping details to calculate the sales tax accurately using the connector on the Adobe Commerce storefront.

## Steps

1. Sign in to your Adobe Commerce storefront account.  
Guest customers can directly select and add products to the cart.
2. Select and add the products you want to order to the cart and go to the shopping cart.  
The products you add to the cart are available in the connected AvaTax account to get the correct tax estimate.
3. Under **Summary**, provide or edit the **Country**, **State/Province**, and **Zip/Postal Code** field values.



Important The **Country**, **State/Province**, and **Zip/Postal Code** fields are mandatory for calculating the sales tax accurately. Set the selected country as a taxable country in the configuration settings.

4. Select the shipping rate as applicable.  
The **Order Total** displays the tax summary.
5. Select the **Tax** row to view tax details for the order.

The connector calculates the sales tax, included or excluded, depending on the default taxation policy. No tax summary appears if exemption is applicable. Exemption applies when the customers have tax certificates. Tax exemption or different tax rules apply when customers use an Entity Use Code. The tax exemption isn't applicable for guest customers.

The cart and the checkout order summary also display any VAT-related messages received from AvaTax.

The tax summary for orders and invoices also displays the Colorado and Minnesota retail delivery fees for applicable transactions. For more information on the Colorado and Minnesota retail delivery fees, see

- [Minnesota retail delivery fee](#)
- [Colorado retail delivery fee](#)

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The Colorado retail delivery fee collection depends on the **Sales in Colorado are less than the retail delivery fee threshold** option in the AvaTax settings. If you select this option, then the Colorado retail delivery fee is not calculated for Colorado transactions and vice-versa. You can access this setting when configuring options for **State of Colorado tax collection and remittance** under **Sales and use tax** in AvaTax.



#### Note

In the case of returns, the retail delivery fee collected is nonrefundable.

6. Select **Proceed to Checkout** to place your order and complete the transaction.

## Validate addresses using the Adobe Commerce storefront

### About this task

Validate your address when adding address details to the address book and at checkout when placing an order as a registered or guest customer.

### Steps

1. Validate an address from the address book as a registered customer:
  - a. Sign in to the Adobe Commerce storefront.
  - b. Go to **My Account > Address Book**.
  - c. Add a new address or edit an existing one and select **Save Address**.  
A pop-up box displays a validated address against the original address.
  - d. Select the address that you want to use and select **Use This Address**.
2. Validate an address at checkout as a registered or guest customer:
  - a. Go to the Adobe Commerce storefront and add products to the cart.
  - b. Select **Proceed to Checkout**.
  - c. On the Shipping Address page, select an existing address or add a new shipping address and select **Next**.  
The Verify Your Address page displays the validated address against the original address.
  - d. Select the address that you want to use and select **Place Order**.  
When you select the suggested address to place the order, it also updates the address in your address book and uses it for future orders.

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# Validate addresses using the Adobe Commerce admin console

## About this task

Avalara for Adobe Commerce validates addresses when capturing or editing customer information and placing an order. The extension validates and displays a corrected address against the original address.

## Steps

1. Sign in to the Adobe Commerce admin console.
2. Validate address when adding or editing customer information:
  - a. Go to **Customers > All Customers**.
  - b. Select **Edit** to view details of a Customer.
  - c. Under Customer Information, select **Addresses**.
  - d. Select **Edit** to update the existing addresses or select **Add New Address** to add a new address.
  - e. Enter address details and select **Validate Address**.  
 The **Validate Address** button won't appear if you disable the **Enable AvaTax** option under **Extension Mode**. This is true even if you have enabled address validation in the settings. The connector validates the address and displays the corrected address against the original address.
  - f. Select the address that you want to use and select **Use This Address**.
3. Validate your address when creating an order:
  - a. Go to **Customers > All Customers**.
  - b. Select **Edit** to view details of a Customer.
  - c. Under Customer Information, select **Orders > Create Order**.
  - d. Select **Add Products By SKU** or **Add Products** to add products to your order.
  - e. Under **Address Information**, select an existing address or add a new address.
  - f. Select **Validate Address**.  
 The connector validates the address and displays the corrected address against the original address.
  - g. Select the address that you want to use and select **Use This Address**.

# Manage tax certificates in the Adobe Commerce storefront

## About this task

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View, add, or invalidate your tax exemption certificates while placing an order or from My Account as a registered Adobe Commerce customer.

## Steps

1. Sign in to the Adobe Commerce storefront.
2. From My Account:
  - a. Go to **My Account** and select **Tax Certificates** or select the **Manage existing sales tax certificates** link in the cart when placing an order.

The **Tax Certificates** page displays the tax certificates available for your account.

The available tax certificates display the state, validity dates, and status. You can view or invalidate a certificate. You can also add a new certificate.

- b. Select **Invalidate Certificate** to invalidate a certificate.
- c. Select **View Certificate** to view a tax certificate:
- d. To add a new certificate, select **Add Exemption**:
  - i. Select an exemption zone and select **Proceed**.
  - ii. In the **Your Tax Information** pop-up, enter the required information and select **Save and Continue**.

The **Select a reason for creating this document** pop-up displays various reasons for tax exemptions depending on different tax exemption rules.

- iii. Select the applicable tax-exempt reason for you and select **Save and Continue**.

Depending on the reason, provide additional information to complete adding a new tax certificate.

- iv. Provide the relevant information as required.
- v. Provide the **Signer Information** and select **Save and Continue**.

It creates and adds a new tax exemption certificate to your account. It recalculates the tax for your order as applicable if you've set the certificates autoapproval to **Yes**.

3. Add a new certificate when placing an order:
  - a. Add your products to the cart and select **Proceed to Checkout**.
  - b. Select or add a new shipping address and select **Next**.
  - c. On the **Verify Your Address** page, select the **Add your first certificate** Link.
  - d. In the **Your Tax Information** pop-up, enter the required information and select **Save and Continue**.

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The **Select a reason for creating this document** pop-up displays various reasons for tax exemptions depending on different tax exemption rules.

- e. Select the applicable tax-exempt reason for you and select **Save and Continue**.  
Depending on the reason, provide additional information to complete adding a new tax certificate.
- f. Provide the relevant information as required.
- g. Provide the **Signer Information** and select **Save and Continue**.  
It creates and adds a new tax exemption certificate to your account. It also recalculates taxes for your order as applicable if you've set the certificates auto-approval to **Yes**.

## Calculate customs duty for a cross-border transaction

### Before you begin

Ensure that you've set up the following:

- Cross-border rules in your AvaTax account
- Customs duty and shipping methods in the connector settings
- Cross-border classes for products
- Destination country as the taxable country

### About this task

Initiate a cross-border transaction and the connector calculates the customs duty and taxes depending on whether the buyer or the seller is the importer of the record.

### Steps

1. Add your products to the cart and go to the cart.
2. In the cart, provide the **Country**, **State/Province**, and **Zip/Postal Code** information of the destination country.

The connector estimates the customs duty and other taxes depending on the setting for **This company is the importer of record** checkbox set in AvaTax under **Where you collect tax > customs duty**.

- If you select this checkbox, then the seller collects the customs duty and taxes. It calculates and adds the customs duty and taxes to the order total in the shopping cart. The buyer needs to pay the customs duty and taxes at the time of order checkout.
- If you don't select this checkbox, then the buyer needs to pay the customs duty and taxes on the delivery of the product. The taxes don't reflect in the order total. It displays a message that reads that the buyer is the importer of the record and will pay the import

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customs duty and taxes upon arrival in the destination country. It also displays the tax that the buyer needs to pay.

3. Select **Proceed to Checkout** to complete your transaction.



Note Taxes are displayed in the tax summary depending on the taxation policy. Also, taxes don't reflect in the order tax summary if the customer has a valid exemption certificate.

The cart and the checkout order summary also display any VAT-related messages received from AvaTax.

## Calculate taxes from the Adobe Commerce admin console

### About this task

As an Adobe Commerce administrator user, initiate an order for a customer from the Adobe Commerce admin console to calculate the sales tax or customs duty as a cross-border transaction.

### Steps

1. Sign in to the Adobe Commerce admin console.
2. Go to **Customers > All Customers** and edit the customer details for whom you want to place an order.
3. In the left pane on the customer details page, select **Orders**.
4. Select **Create Order**.
5. Select **Add Products By SKU** or **Add Products**.
6. Confirm and validate the shipping address.  
Add a new address for the selected customer and select **Validate address** or continue with the existing saved address.

If you're creating a cross-border transaction, provide the address of the destination country.

7. Under **Payments & Shipping Information**, select **Get shipping methods and rates**.
8. Select a **Shipping Method**.  
The estimated sales tax or the customs duty displays under **Order Totals**. It calculates the customs duty depending on whether the seller or the buyer is the importer of the record. It doesn't calculate tax if the customer has a valid tax exemption certificate.

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The cart and the checkout order summary also display any VAT-related messages received from AvaTax.

9. Select **Submit Order** to place the order.  
After completing the order for the customer, it goes into the pending state until it generates an invoice.

## Create and submit invoices and credit memos

### About this task

Submit the invoice to complete the transaction after placing an order in the Adobe Commerce admin console for a customer.

### Steps

1. Sign in to the Adobe Commerce admin console.
2. Create and submit an invoice:
  - a. Go to **Sales > Orders**.  
After placing the order, the status of the order status is Pending.
  - b. Select **View** to select the order for which you want to create an invoice.  
The order details display.
  - c. Select **Invoice**.  
The New Invoice page displays the order details.
  - d. Select **Submit Invoice** to generate the invoice.  
It lists the generated invoices on the AvaTax Queue page. It submits the invoices to AvaTax depending on the tax mode configuration settings.
3. Create and submit a credit Note:
  - a. Go to **Sales > Orders**.
  - b. Select **View** to select the order for which you want to create a credit memo.
  - c. On the order details page, select **Credit Memo**.  
The New Memo page displays the order details with two more fields:
    - **Adjustment Refund**: Amount to be refunded to the customer
    - **Adjustment Fee**: Amount to be collected from the customer
  - d. Edit the following fields as applicable:
    - **Refund Shipping**: Shipping charges for the order
    - **Adjustment Refund**: Amount to be refunded to the customer
    - **Adjustment Fee**: Amount to be collected from the customer
4. Select **Update Totals** to view the refund amount for the order.
5. Select **Refund Offline** to process the refund.

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# Manage tax certificates in the Adobe Commerce admin console

## About this task

As an Adobe Commerce administrator, view, add, and invalidate certificates.

## Steps

1. Sign in to the Adobe Commerce admin console.
2. Go to **Customers > All Customers** and select **Edit** for a customer.
3. In the left pane under Customer Information, select **Tax Certificates**.  
It lists all the tax certificates available for the customer on the page. It also displays the validity and status of the certificates.
4. Select **View Certificate** to view the details for a particular tax certificate.
5. Select **Invalidate Certificate** to invalidate a particular tax certificate for the customer account.  
The customer won't get any tax exemption for the invalidated certificate.
6. Add a new tax certificate for the customer:
  - a. Select **Add Exemption**.
  - b. Select an exemption zone and select **Proceed**.
  - c. In the **Your Tax Information** pop-up, enter the required information and select **Save and Continue**.  
The **Select a reason for creating this document** pop-up displays various reasons for tax exemptions depending on different tax exemption rules.
  - d. Select the applicable tax-exempt reason applicable for you and select **Save and Continue**.  
Provide additional information to complete adding a new tax certificate depending on the reason.
  - e. Provide the relevant information as required.
  - f. Provide the **Signer Information** and select **Save and Continue**.  
It creates and adds a new tax exemption certificate to your account. It also recalculates taxes for your order as applicable if you've set the auto-approval of tax certificates to **Yes**.

# Invite customers to add exemption certificates

## About this task

Adobe Commerce administrators can invite customers to add tax exemption certificates using the Adobe Commerce admin console. This sends a link to the customers over email to add exemption certificates.

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## Steps

1. Sign in to the Adobe Commerce admin console.
2. From the **Customers** dashboard page:
  - a. Go to **Customers** and select **All Customers**.  
The Customers dashboard page displays a list of all the registered customers.
  - b. Select **Invite** in the **CertExpress** column.  
If the **CertExpress** column isn't visible on the customer dashboard, select the **Column** settings to enable the **CertExpress** column.  
A pop-up message box displays that reads:  
  

"This customer will be synced to AvaTax (using the customer's email and default billing address) and AvaTax will send an email to the customer, asking them to add an exemption certificate in the AvaTax interface. Would you like to proceed"?
  - c. Select **OK** to invite the customer to add a certificate.
3. From the Tax Certificates page of a customer:
  - a. Go to **Customers > All Customers** and select **Edit** for a customer.
  - b. In the left pane under Customer Information, select **Tax Certificates**.  
It lists all the tax certificates available for the customer on the page. It also displays the validity and status of the certificates.
  - c. Select **Invite Customer to Add Certificate**.  
A pop-up message box displays that reads:  
  

"This customer will be synced to AvaTax (using the customer's email and default billing address) and AvaTax will send an email to the customer, asking them to add an exemption certificate in the AvaTax interface. Would you like to proceed"?
  - d. Select **OK** to invite the customer to add a certificate.

## Result

It sends an email to the customer with a link to add tax exemption certificates to AvaTax.

## View products sync status

View the sync status for your products or a particular product at Adobe Commerce.

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## About this task

The connector enables you to view the sync status of your products in the Adobe Commerce admin console.

### Steps

1. Sign in to the Adobe Commerce admin console.
2. Go to **Catalog** and select **Products**.

The Products dashboard page displays your products available at Adobe Commerce. The **AvaTax Sync Status** column displays the sync status of a product. The sync statuses are Pending, Completed, and In Progress.

You can also view the sync status of a particular product.

3. Select the product for which you want to view the sync status and select **Edit**.
4. In the product details page, select **AvaTax**.

The **Sync Status** field displays the sync status of the selected product.

## Sync products with Avalara manually

Sync the products manually with the sync status as Pending manually with AvaTax.

### About this task

The connector enables you to either sync multiple products or an individual product with AvaTax manually. All products sync to your configured company account in AvaTax.

### Steps

1. Sign in to the Adobe Commerce admin console.
2. Go to **Catalog** and select **Products**.

The Products dashboard displays a list of your products at Adobe Commerce. It also displays the sync status for each product in the **AvaTax Sync Status** column. You can manually sync the products with Pending status.

3. Sync multiple products:

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- a. In the Products dashboard, select the products that you want to sync with AvaTax.
- b. From **Actions**, select the **Sync to AvaTax** option.

This adds the selected products to the product sync queue.

4. Sync an individual product:
  - a. In the Products dashboard, select the product that you want to sync manually and then select **Edit**.
  - b. In the product details page, go to **AvaTax**.
  - c. Select **Sync to AvaTax**.

This adds the product to the product sync queue.

## Synchronize customer information with Avalara

### About this task

As an Adobe Commerce administrator, synchronize the updated personal information of the customer with the AvaTax account.

It synchronizes the personal information of the customers with AvaTax only during the onboarding process. Any later updates to this information on Adobe Commerce don't synchronize with the customer AvaTax account. The Adobe Commerce administrator needs to update this information manually.

### Steps

1. Sign in to the Adobe Commerce admin console.
2. Go to **Customers > All Customers** and select **Edit** for a customer.
3. In the left pane under Customer Information, select **Tax Certificates**.  
It lists all the tax certificates available for the customer on the page.
4. Select **Update Customer Information at Avalara**.  
It synchronizes the customer information updated on Adobe Commerce with the respective Avalara account.

## View and process queue items

### About this task

View the invoices or credit memos in the process queue and process them manually if required.

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## Steps

1. Sign in to the Adobe Commerce admin console.
2. Go to **Stores > Queue**.  
The AvaTax Queue page displays the invoices and credit memos in the queue. It processes the queue items only after two minutes after you create them. It processes the queue items automatically depending on the configuration.
3. To process the queue manually, select the items you want to process and select **Process Queue Now**.  
IT processes the selected queue items.



Note Even in the manual processing, it processes items only two minutes after you create them.

## View application logs

### About this task

View the connector API request and response logs with the level of details that you have set up.

## Steps

1. Sign in to the Adobe Commerce admin console.
2. Go to **Stores** and select **Logs**.  
The AvaTax Logs page displays the application logs depending on the configured log level. It also displays the summary of the logs and errors.
3. Select **View** in the **Action** column to view a particular log item in detail.

## Uninstall Avalara for Adobe Commerce

Uninstall the Avalara for Adobe Commerce connector when required.

### About this task

You can uninstall the Avalara for Adobe Commerce extension when required.

## Steps

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1. Go to the root of your Adobe Commerce installation directory and run the following command:  
`bin/magento module:uninstall Avalara_AvaTax`
2. If you also need to remove all database tables, run the following command in the root of your Adobe Commerce installation directory:  
`bin/magento module:uninstall Avalara_AvaTax --remove-data --clear-static-content`