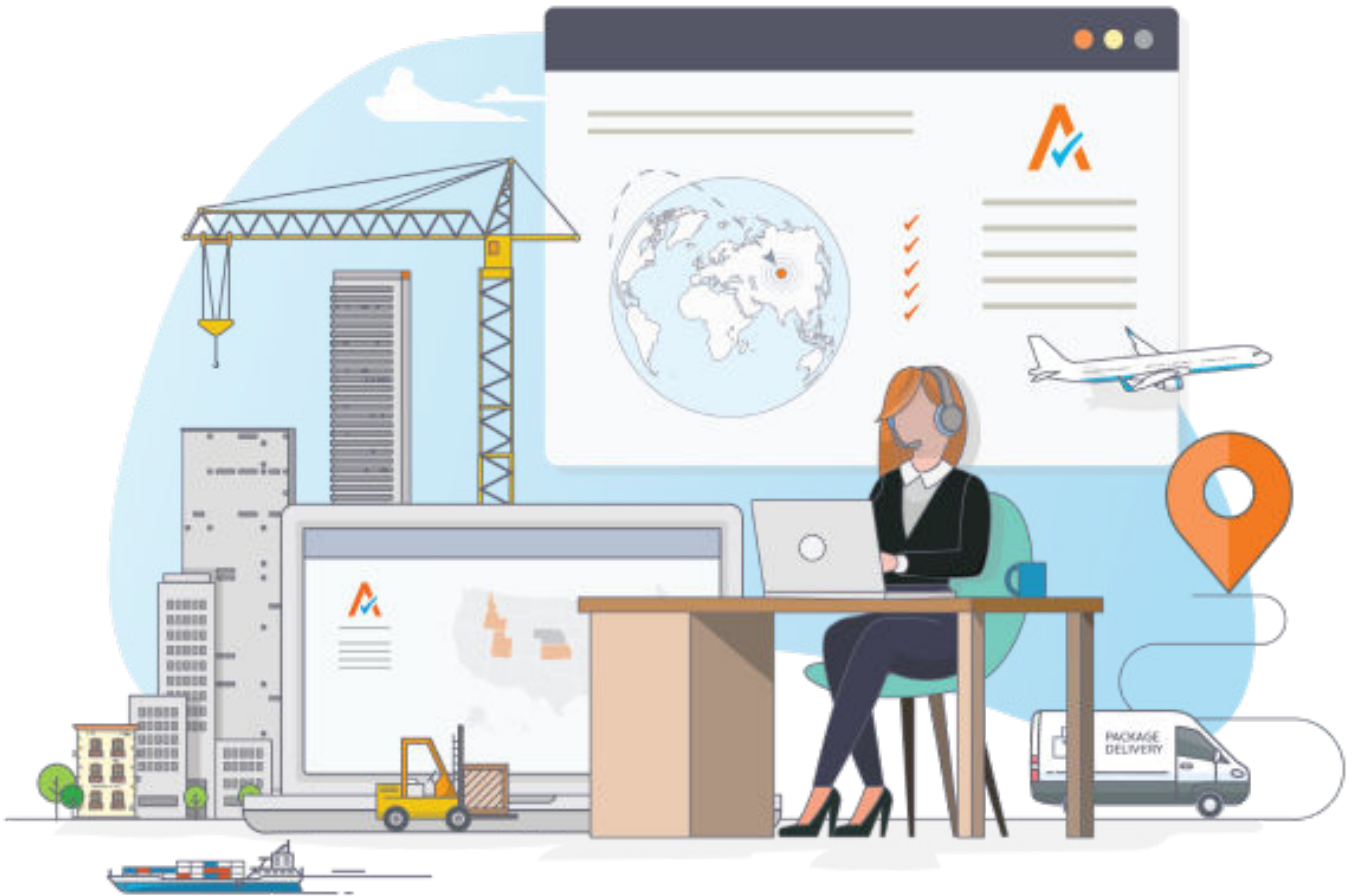




# Avalara for WooCommerce



11 September 2024

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## Avalara for WooCommerce overview

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

Avalara for WooCommerce 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, visit the following links:

- If you're new to this connector, install and configure your connector. See [Instructions for setting up Avalara for WooCommerce](#).
- If you have already installed this connector, see [Calculate tax in the WooCommerce 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 WooCommerce Release Notes](#).

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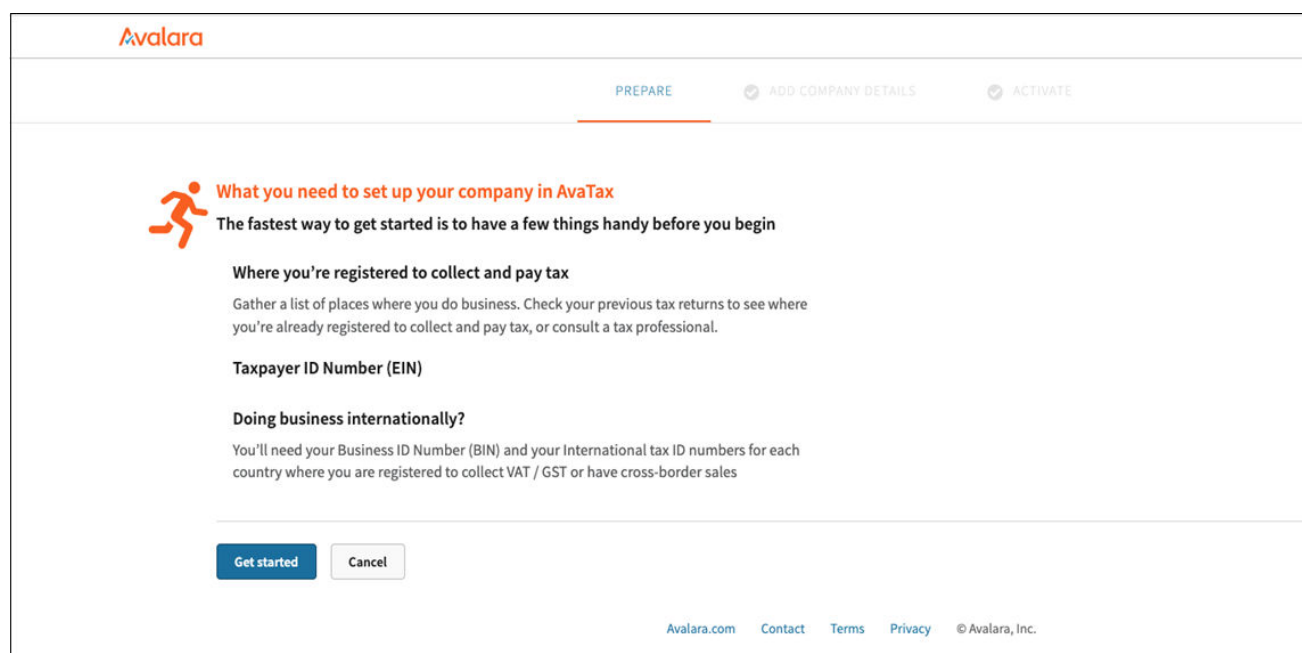
## Instructions for setting up Avalara for WooCommerce

Choose setting up Avalara for WooCommerce 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 WooCommerce](#) to install and configure your connector.

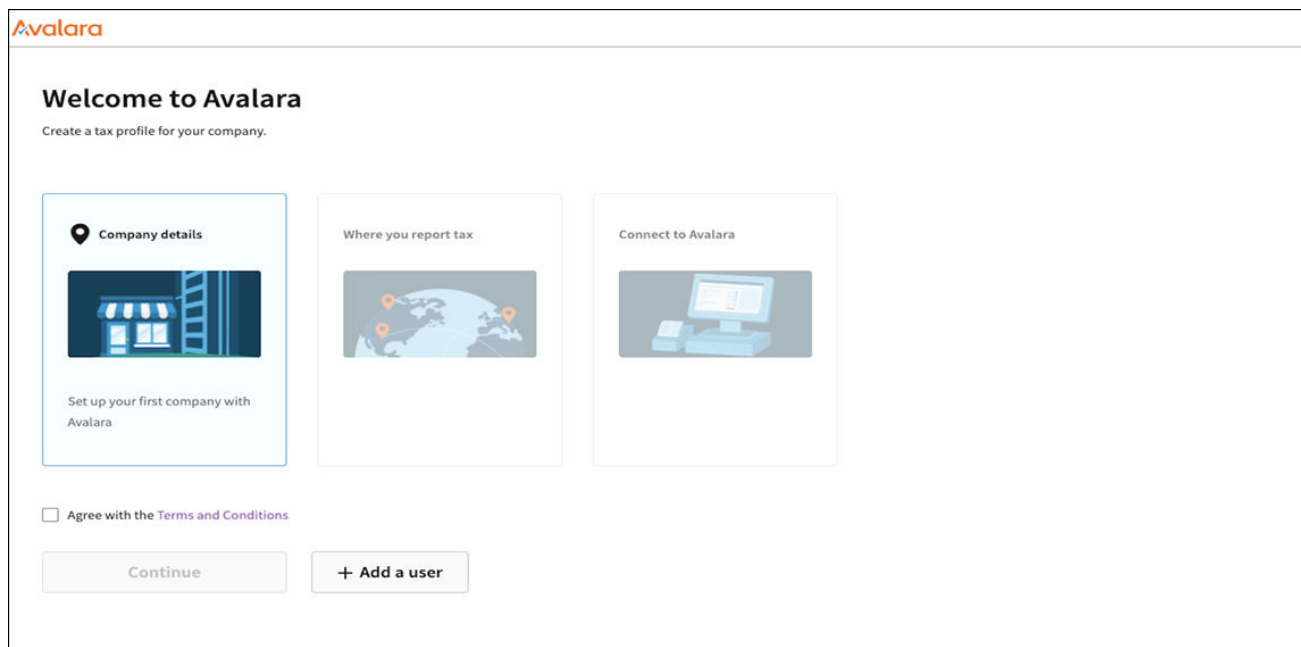


The screenshot shows the Avalara AvaTax landing page. At the top, there is a navigation bar with the Avalara logo and three tabs: "PREPARE" (active), "ADD COMPANY DETAILS", and "ACTIVATE". Below the navigation bar, there is a section titled "What you need to set up your company in AvaTax" with a red running person icon. The text says: "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 WooCommerce 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 WooCommerce

Install and set up Avalara for WooCommerce to start calculating taxes.

### Before you begin

Ensure that you complete the following requirements to install and set up the Avalara for WooCommerce plugin:

- WooCommerce version 3.6.0 or later
- WordPress version 5.2 or later
- PHP 5.3 or later. You can check this under **WooCommerce > Status**.
- You've set up your WordPress account.
- You've installed and set up your WooCommerce store on WordPress.
- 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.

### Steps

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1. [Install Avalara for WooCommerce](#)

Complete the installation prerequisites and either use the add to site option or download the setup file to install the plugin. Enable tax rates and calculations in WooCommerce to display the tax settings including AvaTax.

2. [Connect WooCommerce with Avalara](#)

Connect your WooCommerce store to your Avalara account. Your plugin is ready to start calculating taxes.

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

Set up your plugin in AvaTax to change the existing or set new configuration preferences depending on your business requirements.

4. [Configure settings in WooCommerce](#)

Set up your plugin in WooCommerce to change the existing or set new configuration preferences depending on your business requirements.

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 WooCommerce

From the WooCommerce marketplace, add the Avalara for WooCommerce plugin to your WooCommerce site directly or download the setup file to install it.

### Before you begin

Ensure the following:

- You've signed in to your WordPress using the admin account that you've used for Avalara subscription.

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## About this task

Search and install the Avalara for WooCommerce plugin from the WooCommerce marketplace. You can add the plugin to your WooCommerce site directly or download the setup file to install it.

## Steps

1. Go to the WooCommerce marketplace and search for Avalara AvaTax.
2. On the Avalara AvaTax extension page, select **Add to store** or **Add to cart**.
3. Complete the checkout process and select **Place free order**.  
The Order Details page displays the plugin installation options along with your order and invoice information.
4. You can install Avalara for WooCommerce using the following options:
  - Install using the **Add to site**.
  - Install using the **Download**.
5. Install by using the **Add to site** option:



### Note

Make sure you have your WooCommerce store set up on your WordPress account and it's publicly accessible. You require your store URL to install the plugin.

- a. On the **Order Details** page, select the **Add to site** option.

The **Select your site** page displays your available WooCommerce sites. You can select an existing site or add a new site.

- b. Select an existing site if available.
- c. To add a new site, select the **Add a new site** option and provide the URL of your WooCommerce store.

The **Installing extension** page displays that the plugin installation is in progress.

6. Install by using the **Download** option:
  - a. On the **Order Details** page, select the **Download** option.

The Avalara for WooCommerce plugin setup file downloads in the zip format.

- b. On your WordPress account, go to **Plugins > Installed Plugins**.

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- c. Select **Add New**.
- d. On the **Add Plugins** page, select **Upload Plugin**.
- e. Select **Choose File** and then select the plugin zip file that you've downloaded.
- f. Select **Install Now**.

The Avalara for WooCommerce plugin installation starts.

- g. After the installation is complete, select **Activate Plugin** to activate the plugin.

## Result

The plugin page displays after the installation is complete. Select **Configure** to go to the **Connect to Avalara** page if you've already enabled tax calculation in WooCommerce.

If you're installing the plugin for the first time, ensure that you've enabled tax calculation under **General > General options > Enable tax rates and calculations**.

## Connect WooCommerce to Avalara

Connect your WooCommerce store to your sandbox or production account in Avalara to start calculating taxes.

## Before you begin

Ensure the following:

- You've set up your Avalara account. Keep your account ID and license key handy.

## About this task

After you've installed the plugin, connect your WooCommerce store to your Avalara account.



### Note

We have an upgraded UI from version 2.7.0. We recommend you to clear the browser cache for a consistent user experience.

## Steps

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1. Sign in to your WordPress account and go to **WooCommerce > Settings > Tax > AvaTax**.

Alternatively, you can also select **Configure** on the **Avalara AvaTax** plugin page after you've installed the plugin.

The **Connect to Avalara** page appears.

2. Depending on your preference, enter your Avalara production or sandbox **Account ID** and **License Key**.

If you're unable to find your license key, select the **Learn how you can get a new license key** link for help with generating a new license key.

3. Select from the following options depending on the credentials that you've used:
  - **Connect to Production:** Connects your WooCommerce store to your default company in your production account in Avalara. Use this account to calculate taxes for customer transactions on your storefront.
  - **Connect to Sandbox:** Connects your WooCommerce store to your default company in your sandbox account in Avalara. Use this account to perform test transactions.

If you're not sure which account to connect, select the **Learn more about Sandbox and Production accounts** link for help.

On connecting, you receive a success message reading that you've connected your WooCommerce store to your default company in Avalara, displaying the company name. You can select the **back to Avalara** link to complete setting up the tax profile for the given company.

The plugin fetches the default company and location details from your AvaTax account and sets up your production or sandbox accounts accordingly. It also fetches your address validation, exemption subscription details, and cross-border configuration from the nexus and displays the respective settings accordingly.

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 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 settings** if you want to synchronize any configuration changes in Avalara or WooCommerce immediately. Any changes in the connector settings sync every 15 minutes automatically.

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- Select the **Advanced Settings** link to configure your connector settings in Avalara. This opens the connector settings page in AvaTax if you're logged in to your AvaTax account.

After you set up your preferences in Avalara and WooCommerce, you're ready to calculate for your transactions.

## Related tasks

- [Configure advanced settings in Avalara](#)
- [Configure settings in WooCommerce](#)

[License keys](#)

[AvaTax sandbox accounts](#)

## Configure advanced settings in Avalara

Set up your Avalara for WooCommerce plugin in Avalara according to your business preferences.

## Before you begin

- Ensure that you've connected your WooCommerce store to your Avalara production or sandbox account.
- Ensure you have administrator access to update the Advanced settings in Avalara.



### Note

Connecting to your Avalara account successfully enables the **Manage Settings** option in Avalara.

## About this task

You can update the advanced setting options for your company based on your business needs. Use these settings to set up your configuration preferences for the transactions on your WooCommerce store.

However, each Advanced setting option comes with a default setting. You can continue with the default setting or change it if needed.

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## Steps

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

You can see multiple WooCommerce tiles depending on the integration and Avalara companies set up for your account. Locate and select the setting that you want to configure.

The tiles also show the active installed version of the Avalara for WooCommerce plugin and the latest data refresh recorded date.

3. Select **Show all settings** to expand and view the different Advanced setting options. The following advanced settings sections are available for customization:
  - [Tax calculation settings](#)
  - [Address validation setting](#)
  - [Customer exemptions setting](#)
  - [VAT ID setting](#)
  - [Settings for transaction logs](#)
4. Update the settings depending on your business needs and select **Save**.



### Note

After you update settings in Avalara, the plugin automatically synchronizes changes. It takes approximately 15-20 minutes to synchronize settings automatically. To immediately synchronize the updated settings between the plugin and Avalara, use the **Sync settings** option on the plugin configuration page in WooCommerce. This option ensures that updates sync immediately to prevent any issues arising from sync delays.

## Tax calculation settings

Learn about the different tax calculation settings in Avalara.


The tax calculation settings in Avalara helps you configure how you want Avalara to calculate tax for your business.

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Table 1. Tax calculation settings in AvaTax

Field name	Description
Calculate tax	<p>Turn on to calculate taxes for all transactions on your WooCommerce store using Avalara.</p> <p>The plugin calculates tax based on the <b>Calculate tax based on</b> setting in WooCommerce.</p> <p>If you turn this off , all your transactions use the native WooCommerce settings automatically.</p>
Save transactions in Avalara for reporting	<p>Turn on to save transactions in Avalara for reporting automatically.</p> <p>This saves transactions in Avalara based on the order transition scenarios listed here:</p> <ul style="list-style-type: none"> <li>• Payment complete (WooCommerce event)</li> <li>• Order status changed from on-hold to processing</li> <li>• Order status changed from on-hold to completed</li> <li>• Order status changed from failed to processing</li> <li>• Order status changed from failed to completed</li> </ul> <p>If you turn this off, the plugin doesn't save transactions to Avalara automatically based on order status update. You can still send transactions to Avalara manually.</p>
Avalara company name	<p>Displays the name of your default Avalara company that you've connected your WooCommerce store to.</p> <p>If you have multiple companies configured in your Avalara account, it displays a dropdown to select your preferred company.</p>

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Field name	Description
	<p>The plugin uses the primary address of the default company as the origin address for transactions.</p> <p>If you change the company, then your Avalara and plugin settings will get updated according to the subscriptions and configuration settings associated with the new company.</p> <div>  <p><b>Note</b></p> <p>If you change the company address, disconnect and connect again. Select the company and select <b>Save</b> to reflect the new address in your transactions. If you select a different company, then the plugin uses the primary address of the new company as the origin address.</p> </div>
Shipping tax code	<p>Enter a default shipping tax code for your store transactions. Enter a tax code that you want to use. Transactions that are missing a shipping tax code use this tax code by default.</p> <p>Avalara assigns a third-party common carrier (FR) by default if you don't enter a value.</p>

## Related tasks

- [Calculate tax in the WooCommerce storefront](#)

## Address validation setting

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

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Use this setting to enable address validation services for your WooCommerce store users. This setting is available only if you've configured the nexus for Canada and the U.S.



#### Note

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

Table 1. Address validation setting in Avalara

Field name	Description
Validate addresses with Avalara	<p>Turn <b>On</b> to enable the address validation option for the customer ship-to address in the U.S. and Canada. The plugin verifies, corrects, and formats addresses according to the USPS and Canada Post database.</p> <p>After you turn on address validation, the plugin displays the <b>Validate Address</b> button either for customer billing address or customer shipping address depending on the <b>Calculate tax based on</b> setting in WooCommerce.</p> <p>For example, if you've set <b>Calculate tax based on</b> to <b>Customer shipping address</b>, it displays the <b>Validate Address</b> button for the shipping address during checkout.</p>

#### Related tasks

- [Validate addresses in the WooCommerce storefront](#)

### Customer exemptions setting

Learn about the customer exemption setting in Avalara for transactions on your WooCommerce store.

Use this setting to manage your exemption certificates.

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**Note**

This option is available only for registered WooCommerce customers with an active subscription to the following:

- ECM Essentials
- ECM Pro
- ECM Premium

Table 1. Customer exemptions setting in Avalara

Field name	Description
Enable exemption certificates	<p>Turn <b>On</b> to enable customer exemptions for your WooCommerce store.</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 WooCommerce admins to:</p> <ul style="list-style-type: none"> <li>• Add certificates for customers</li> <li>• Invite customers to add certificates</li> <li>• View or invalidate a certificate for a customer</li> </ul> <p>WooCommerce store customers can view and manage their certificates from their WooCommerce store account settings.</p>

**Related tasks**

- [Add an exemption certificate for a user](#)
- [Invite a customer to add exemption certificates](#)
- [Manage certificates from the WooCommerce storefront](#)

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## VAT ID setting

Learn about the VAT ID input setting in Avalara.

Use this setting to enable customers to enter their business VAT ID for transactions outside the U.S.



### Note

This setting is available only if you have set up any other country in your nexus other than the U.S. and Canada.

Table 1. Transactions outside the U.S. setting in Avalara

Field name	Description
Collect business VAT ID	<p>Turn on to enable customers to enter their business VAT ID for business-to-business (B2B) transactions.</p> <p>When turned on, it displays a field to enter the customer business VAT ID during the checkout. The plugin sends the customer VAT ID entered at checkout as Business Identification Number (BIN) in Avalara. The VAT ID displays in orders, invoices, and credit memos.</p>

## Settings for transaction logs

Learn about the transaction logs setting in Avalara.

This setting creates a log of API requests, responses, and errors for transactions. WooCommerce saves these logs, which you can use for debugging purposes.

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Table 1. Avalara for WooCommerce transactions log setting in Avalara

Field name	Description
Enable logging	<p>Turn <b>On</b> to create and save logs for all Avalara transactions on your WooCommerce store.</p> <p>This records all API requests and logs for Avalara transactions in WooCommerce. To help Avalara assist you with troubleshooting, keep this turned on.</p> <p>All logs are saved in WooCommerce and are available at <b>WooCommerce &gt; Status &gt; Logs</b>.</p>

### Related tasks

- [View transactions logs](#)

## Configure settings in WooCommerce

Set up your Avalara for WooCommerce plugin in WooCommerce according to your business preferences.

### Before you begin

Ensure that you've connected your WooCommerce store 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. Sign in to your WordPress admin account and go to **WooCommerce > Settings > Tax**.
2. Select **AvaTax** to go the plugin setting page.
3. Select the setting name to view the different options.

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You can configure the [Transactions outside the US \(HS code classification\) settings](#) settings in WooCommerce.

4. Update the settings depending on your business needs and select **Save changes**.  
In addition to these settings, the following Avalara settings are available in WooCommerce:
  - [Avalara transport setting](#)
  - [Seller importer of record setting](#)



#### Note

After you update settings in WooCommerce, the plugin automatically synchronizes the changes with Avalara. It takes approximately 15-20 minutes to synchronize changes automatically. To immediately synchronize the updated settings between the plugin and Avalara, use the **Sync settings** option. This option ensures that updates sync immediately to prevent any issues arising from sync delays.

## Transactions outside the US (HS code classification) settings

Learn about the transactions outside the U.S. setting options in WooCommerce.


Use this setting to enable the calculation of customs duties for your cross-border transactions. You can select countries for HS code assignment and sync your WooCommerce product catalog with Avalara. Synchronizing assigns the products with HS codes for the selected countries automatically.




#### Note

This setting is available only if you have set up the nexus for any other country outside the U.S. and Canada.

Table 1. Transactions outside the US (HS code classification) settings in WooCommerce

Field name	Description
Enable sync	<p>Turn <b>On</b> to calculate customs duties for transactions outside the U.S.</p> <p>This also enables product sync settings to sync the WooCommerce product catalog with Avalara.</p>
Avalara username	Enter your Avalara user name to validate your account for product sync.
Avalara password	Enter your Avalara password to validate your account for product sync.
Select countries to assign HS codes	<p>Select the destination countries that are applicable for customs duties calculation for your cross-border transactions.</p> <p>The destination countries where you want to calculate customs duties and import fees for your transactions.</p> <p>Avalara assigns HS Codes to the products that you're syncing for the selected countries automatically.</p> <div>  <p><b>Note</b></p> <p>In AvaTax, line items must have a fully qualified Harmonized Tariff Schedule code to calculate customs duties for the destination country.</p> </div>
Sync products with Avalara	Sync products with Avalara synchronizes your product catalog in WooCommerce with Avalara.

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Field name	Description
	<p>Select <b>Sync</b> to start the product sync.</p> <p>This syncs your products in WooCommerce with the Avalara company that you've connected your store to.</p> <div>  <p>Note</p> <p>This is a one-way sync from WooCommerce to Avalara.</p> </div> <p>When syncing is in progress, you can safely leave the page. If you want to stop the product sync, select <b>Stop sync</b> and then select <b>Yes</b> in the confirmation popup. This immediately ends the product sync.</p>

#### Related reference

- [Avalara transport setting](#)
- [Seller importer of record setting](#)

### Avalara transport setting

Set up an Avalara transport option for VAT transactions.

Use this setting to configure the Avalara transport options. You can also set the Avalara transport options for VAT transactions.

You can access these settings from your WordPress account at **WooCommerce > Settings > Shipping**. Go to **Add Shipping Zone > Zone Name > Zone Regions** and add a **Add Shipping Method**. Edit the shipping method that you've added and in the **Avalara Transport** field.

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Table 1. Avalara transport setting in WooCommerce

Field name	Description
Add Shipping Method	Species the applicable shipping method for a VAT transaction.
Avalara Transport	Specifies the transporter of goods in a VAT transaction. The default value is Seller.

## Seller importer of record setting

Seller importer of record setting in WooCommerce.

Use this setting to specify whether the seller is the importer of the record. This setting determines who's liable for the transportation of goods in a VAT transaction.

You can access this setting from your WordPress account at **Users > All Users > Edit <the desired user> > Customer Tax Settings > Seller importer of record.**

Table 1. Seller importer of record setting in WooCommerce

Field	Description
Yes	<p>The seller is liable to collect the customs duty and import taxes from the buyer, and then pay it to the tax authorities.</p> <p>The buyer doesn't pay the taxes as the product price is inclusive of the taxes. The checkout page displays the included duties and taxes.</p>
No	The buyer is liable to pay the customs duty and import taxes upon arrival in the destination country.

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Field	Description
	<p>The transaction doesn't include customs duties and the checkout page displays a message along with the applicable taxes:</p> <p><b>Example:</b> Estimated import customs duty &amp; tax calculated. The buyer is the importer of the record and will pay import customs duty &amp; tax upon arrival in the destination country. 27.01 Import Duty and 47.9 VAT apply.</p>
AvaTax Default	<p>Calculates the customs duties and import taxes depending on the value of the <b>This company is the importer of record</b> option in the AvaTax settings.</p> <p>The checkout page displays the included taxes or cross-border message accordingly.</p>

## Product tax code setting

Learn about the product tax code setting in WooCommerce.

This setting enables you to set a tax code for a specific product.

All transactions use the default product tax code, which the plugin enables for you. You can override this at the category or product level. If you have a tax code set for a category, it overrides the default tax code for all products in that category. You can set the tax code while creating or editing a category of products.

You can access this setting from your WordPress account at **WooCommerce > Products > All Products > Edit <the desired product> > General**.

Table 1. Product tax code setting in WooCommerce

Field	Description
Tax Code	<p>Enter the tax code for the selected product.</p> <p>The product tax code that you specify overrides the default tax code <b>P0000000</b> for that product.</p>

## Tax options setting

Learn about the tax options setting in WooCommerce.

The WooCommerce setting that specifies whether the product prices on your store are tax-inclusive or tax-exclusive. You can set this in WooCommerce as your taxation policy when entering the product prices. This impacts how the plugin calculates and displays taxes for transactions.

You can access this setting from your WordPress account at **WooCommerce > Settings > Tax > Tax Options > Prices entered with tax**.

Table 1. Tax options setting in WooCommerce

Field	Description
Yes, I will enter prices inclusive of tax	Lists the product prices on the storefront as <b>INCLUSIVE</b> of the taxes. The shopping cart doesn't display taxes added separately as the included taxes are already part of the product price.
No, I will enter prices exclusive of tax	Lists the product prices on the storefront as <b>EXCLUSIVE</b> of the included taxes. The applicable taxes add to the product price in the shopping cart.

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## Set up Avalara for WooCommerce via AvaTax Onboarding

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

### Before you begin

Ensure that you complete the following requirements to install and set up the Avalara for WooCommerce plugin:

- Ensure that you have WooCommerce version 3.6.0 or later, WordPress version 5.2 or later, and PHP 5.3 or later.
- Ensure you've installed and set up your WordPress account and WooCommerce store on WordPress.
- 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

To connect Avalara for WooCommerce to your business application, purchase the plugin, install it, enable, and connect it to your Avalara account.

**For a quick view, watch the video on [Connect your Avalara and WooCommerce accounts](#):**

### Steps

1. [Install Avalara for WooCommerce via AvaTax Onboarding](#)  
Complete the required prerequisites and install the Avalara for WooCommerce plugin.
2. [Connect WooCommerce to Avalara](#)  
Connect your WooCommerce store to your Avalara account. Your plugin is ready to start calculating taxes.
3. [Configure advanced settings in Avalara](#)  
Set up your plugin in AvaTax to change the existing or set new configuration preferences depending on your business requirements.
4. [Configure settings in WooCommerce](#)

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Set up your plugin in WooCommerce to change the existing or set new configuration preferences depending on your business requirements.

#### 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 WooCommerce via AvaTax Onboarding

From the AvaTax Onboarding, install the Avalara for WooCommerce plugin.

### 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](#).

### About this task

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

### Steps

1. On the **Connect to Avalara** page, select **Connect**, and then select **Continue** to navigate to the business applications home page.  
The Avalara for WooCommerce plugin page on the WooCommerce store opens in a new window.
2. Sign in to your WooCommerce account and select **Free Download** to add the plugin to the cart.
3. Select **Proceed to Checkout**.
4. On the Checkout page, enter your contact information and billing address details, and then select **Place free order**.  
The Oder Details page displays the plugin installation options along with your order and invoice information.
5. You can install Avalara for WooCommerce using the following options:
  - Install using the **Add to site**.
  - Install using the **Download**.

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## 6. Install by using the **Add to site** option:



### Note

Make sure you have your WooCommerce store set up on your WordPress account and it's publicly accessible. You require your store URL to install the plugin.

- a. On the **Order Details** page, select the **Add to site** option.

The **Select your site** page displays your available WooCommerce sites. You can select an existing site or add a new site.

- b. Select an existing site if available.
- c. To add a new site, select the **Add a new site** option and provide the URL of your WooCommerce store.

The **Installing extension** page displays that the plugin installation is in progress.

## 7. Install by using the **Download** option:

- a. On the **Order Details** page, select the **Download** option.

The Avalara for WooCommerce plugin setup file downloads in the zip format.

- b. On your WordPress account, go to **Plugins > Installed Plugins**.
- c. Select **Add New**.
- d. On the **Add Plugins** page, select **Upload Plugin**.
- e. Select **Choose File** and then select the plugin zip file that you've downloaded.
- f. Select **Install Now**.

The Avalara for WooCommerce plugin installation starts.

- g. After the installation is complete, select **Activate Plugin**.

## Result

The plugin page displays after the installation is complete. Select **Configure** to go to the **Connect to Avalara** page if you've already enabled tax calculation in WooCommerce.

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If you're installing the plugin for the first time, complete the [Enable tax calculation in WooCommerce](#) step to display the **Tax** tab. This tab displays the tax settings including the AvaTax option.

## Upgrade to a higher version

Upgrade your Avalara for WooCommerce plugin to a higher version.

### Before you begin

You've logged in to your WordPress account and connected to your WooCommerce store using the admin account that you've used for Avalara subscription.

### About this task

Upgrade your existing Avalara for WooCommerce plugin to a higher version depending on your business needs.

A notification displays on the Plugins page when a new version is available on the marketplace. You can either connect to your store and install or download and install the new version.

Information on the latest release is also available on the [Avalara for WooCommerce Release Notes](#) page.

### Steps

Use one of the following ways to upgrade to a higher version:

1. Upgrade by connecting to your store:
  - a. In the version update notification on the **Plugins** page, select **Connect your store**.
  - b. Follow the instructions on the page to install and upgrade the plugin.
2. Upgrade by using the **Download** option:
  - a. Download the latest version of the plugin from the plugin page on WooCommerce.

The Avalara for WooCommerce plugin setup file downloads in the zip format.

- b. On your WordPress account, go to **Plugins > Installed Plugins**.
- c. Select **Add New**.
- d. On the **Add Plugins** page, select **Upload Plugin**.
- e. Select **Choose File** and then select the plugin zip file that you've downloaded.
- f. Select **Replace current and upload** and install the plugin.

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The plugin installation completes and you can start using the upgraded version of the plugin.

# Calculate tax in the WooCommerce storefront

Calculate sales tax for your transactions on the WooCommerce store.

## About this task

Select your products and add them to the cart as a registered customer or a guest customer to calculate the taxes accurately. You get a summary of the applicable taxes at checkout.

## Steps

1. Sign in to the WooCommerce storefront if you're a registered customer. You can directly select your products as a guest customer.  
For transactions outside the US, ensure that you've set up the nexus and the respective fields. For VAT transactions, ensure that you've completed the required configuration and set up the **Avalara Transport** field.
2. Select **Add to Cart** to add your products to the cart.
3. Select **View Cart** to go to the cart.  
The **Cart Totals** displays the applicable tax calculations for your products depending on whether the product prices are inclusive or exclusive of the taxes.
4. Select **Proceed to checkout** to confirm your address details and complete your order.  
The **Checkout** page also enables you to input your business VAT ID. It also displays the cross-border, and VAT messages from AvaTax for cross-border and VAT transactions respectively.

WooCommerce stores the VAT message from AvaTax and displays it in the Order details under the **VAT message** label in the WooCommerce admin and the storefront.



### Note

- The tax summary in orders and invoices display the Colorado and Minnesota retail delivery fee for applicable transactions.  
For more information on the Colorado and Minnesota retail delivery fees, see
  - [Minnesota retail delivery fee](#)
  - [Colorado retail delivery fee](#)

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, the connector doesn't calculate the Colorado retail delivery fee for Colorado transactions and vice versa.

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You can access this setting when configuring options under **State of Colorado tax collection and remittance > Sales and use tax** in AvaTax.

- WooCommerce stores the VAT message from AvaTax and displays it in the Order details under the **VAT message** label in the WooCommerce admin and the storefront.

5. Select **Place Order** to complete your transaction.

## Validate addresses in the WooCommerce storefront

Validate the address for your orders at checkout from the WooCommerce storefront.

### About this task

Validate your address in the WooCommerce storefront to calculate taxes for your transactions accurately.

Registered customers can validate their shipping or billing address at the **Checkout** during the order process. Guest customers can provide and validate the address at the order checkout.



#### Note

The **Validate Address** button appears for the customer billing or shipping address depending on the **Calculate tax based on** setting in WooCommerce.

## Steps

1. In the WooCommerce storefront, select and add your products to the cart as a registered or a guest customer.
2. Select **View Cart** to go to the cart page.
3. Select **Proceed to checkout**.  
The checkout page displays the billing and shipping addresses under Billing Details for the registered customers. Guest customers can also provide the billing and shipping addresses here.
4. Select **Validate Address**.

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### Important

If you've enabled address validation and the **Validate Address** button doesn't display, you need to switch to the classic checkout page. The latest WooCommerce site uses blocks to display the checkout page. The current version of the plugin doesn't support blocks. To switch to the classic checkout page:

- a. From your WordPress account, go to **Pages > All Pages** and under Checkout, select **Edit**.
- b. Select any block on the page and then select **Block** in the right pane.
- c. Select **Switch to classic checkout** and then select **Switch** in the message pop-up.
- d. Select **Update** and then refresh the page to display the **Validate Address** button.

If the given address is correct, the Address Validated message appears.

If the address is incorrect, a notice appears with the returned error. Make the required changes and revalidate the address.

## View or send orders to Avalara

View orders or change their statuses, or send the completed orders to Avalara.

### About this task

As a WooCommerce admin user, view orders or change their statuses, or send the completed orders to Avalara.

### Steps

1. Sign in to your WordPress account and go to **WooCommerce > Orders**.  
The **Orders** page lists all the available orders.
2. Select an order to view the order details.  
The details for the selected order display. Also, WooCommerce stores the VAT message from AvaTax and displays it under the **VAT message** label for VAT transactions. You can also change the status of the order.
3. Under **General**, use the **Status** dropdown to update the status of the order.

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You can send customer or manually created orders to Avalara only if the order is in the complete state.

4. To send a customer order to Avalara, select **Send to Avalara** under **Order Action** and then select **Update**.

This submits the order to Avalara.

5. To submit a manually created order, add products to the order for a customer, save, and select **Recalculate** to estimate the tax.

After the payment, once the order is in processing or complete state, you can submit the order to Avalara using the **Send to Avalara** action.

## Create orders in WooCommerce

As a WooCommerce admin user, create orders for customers in WooCommerce.

### About this task

As a WooCommerce admin user, create orders for customers in WooCommerce. When creating orders, you can also pass the VAT ID of the customer to Avalara.

### Steps

1. Sign in to your WordPress account and go to **WooCommerce > Orders**.
2. On the **Orders** page, select **Add New**.
3. Under **Customer**, select the customer for which you're creating an order.  
The customer information and the billing and shipping addresses of the customer appear.
4. If applicable, provide the **VAT ID** of the customer.  
This is an Avalara field and you can use this to pass the VAT ID of the customer to Avalara.
5. To add products to your order, select **Add Item(s)** and then select **Add product(s)**.  
The order totals and the applicable taxes appear for the order.
6. Select **Recalculate** to estimate the taxes for the order.  
For transactions outside the US, the included taxes or the cross-border message appears at checkout depending on the **Seller importer of record** settings for the customer.
7. Under **Order Actions**, select **Create**.  
This creates an order for the selected customer. You can send the order to Avalara after the order is complete.

## View orders in the WooCommerce storefront

As a registered WooCommerce customer, view your order from the storefront.

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## About this task

As a registered WooCommerce customer, you can view your orders from your storefront account.

## Steps

1. Sign in to your WooCommerce storefront account.
2. Go to **My Account** and select **Orders**.  
The **Orders** page displays a list of orders for your account.
3. To view an order, select **View** for that order.  
This displays the order details for the selected order. Also, WooCommerce stores the VAT message from AvaTax and displays it in the order if applicable.

## View exemption certificates for a user

As a WooCommerce admin, view the tax certificates that are available for a particular user.

## About this task

As a WooCommerce admin, you can view the details of the exemption certificates for a particular user. The details include state, signed date, expiration date, and status. You can also download the certificate in the PDF format.

## Steps

1. Sign in to your WordPress account and go to **Users > All Users**.
2. Point to the **Username** of the user for which you want to view the certificates, and then select **Edit**.  
You can view the list of certificates available for the user under **Tax Certificates**.
3. To view a particular certificate detail, select the **View Certificate** link.

This downloads the certificate in the PDF format. Open the PDF to view the certificate details.

## Invite a customer to add exemption certificates

As a WooCommerce admin, invite a customer to add exemption certificates.

## Before you begin

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Ensure the following:

- You've enabled Exemption Certificate Management.
- The billing details of the customer are complete as it sends an email to the configured email ID of the customer.

## About this task

As a WooCommerce admin, you can invite a customer to add exemption certificates. This sends an email to the configured email ID of the customer with a link to add exemption certificates.

## Steps

1. Sign in to your WordPress account and go to **Users > All Users**.
2. Point to the **Username** of the user to which you want to invite to add certificates, and then select **Edit**.
3. Under **Tax Certificates**, select **Invite Customer To Add Certificate**.

You receive a message reading that you have successfully sent an invite to the customer.

4. Select **OK** to close the message box.

## Add an exemption certificate for a user

As a WooCommerce admin, create an exemption certificate for a user.

## Before you begin

You've enabled and set up Exemption Certificate Management.

## About this task

As a WooCommerce admin, you can add an exemption certificate for your users from WooCommerce settings.

## Steps

1. Sign in to your WordPress account and go to **Users > All Users**.
2. Point to the **Username** of the user for which you want to add a certificate and then select **Edit**.

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3. Under **Tax Certificates**, select **Add Exemption**.
4. In the **Exemption** pop-up, select the value for **Select a new state/Exposure zone** and then select **Proceed**.  
The **Select a new state/Exposure zone** displays all the states for the countries you've set in the Exemption Certificate Management configuration.
5. Complete the details in **You Tax Information** and select **SAVE AND CONTINUE**.
6. Select the category under which you want to add an exemption and then select **SAVE AND CONTINUE**.
7. Complete the **Business Information** details and then select **SAVE AND CONTINUE**.
8. Complete the **Signer Information** details and then select **SAVE AND CONTINUE**.

The certification process starts and you see a message on the successful creation of the certificate for the selected user.

9. Select **Refresh Certificates**.  
The certificate you've added is visible under Tax Certificates for the user. If you've enabled auto validation of certificates, the status of the certificate is Complete else the certificate is in Pending state. It queues the certificate for validation from the Exemption Certificate Management team.
10. Select **Update User**.

[Add a certificate](#)

## Invalidate an exemption certificate

As a WooCommerce admin, invalidate a certificate for a user.

### About this task

As a WooCommerce admin, you can invalidate an exemption certificate for a user when required. Invalidating delinks the certificate from that user account. It's no longer available under **Tax Certificates**.

### Steps

1. Sign in to your WordPress account and go to **Users > All Users**.
2. Point to the **Username** of the user for which you want to invalidate a certificate and then select **Edit**.
3. Under **Tax Certificates**, select the **Invalidate Certificate** link for the certificate that you want to delink.
4. Select **OK** in the confirmation message box.

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This delinks the certificate from that user account. The page refreshes and the certificate is no longer available under Tax Certificates.

5. Select **Update User**.

## Manage certificates from the WooCommerce storefront

As a WooCommerce storefront user, view, add, and invalidate an exemption certificate.

### About this task

As a WooCommerce storefront user, you can view, add, or invalidate exemption certificates from the storefront. You can manage certificates at checkout when placing an order or from your account profile.

### Steps

1. Sign in to your storefront account.
2. Add a certificate when placing an order or from **My Account**:
  - a. Select **Add Certificates** under **Exemption** on the checkout page during order checkout. To add a certificate from the **My Account** page, go to **My Account > Tax Certificate** and then select **Add Exemption**.



#### Note

AvaTax uses the **Email Address** that you enter under **Billing Details** for tax exemption. To receive tax exemption for the order, ensure that the email ID you enter here's applicable for tax exemption. The checkout page reflects taxes accordingly.

- b. Select the value for **Select a new state/Exposure zone** and then select **SAVE AND CONTINUE** and complete the certificate creation steps. After successful creation of the certificate, it's available in **Tax Certificate** under **My Account**. The checkout page also reflects taxes according to the added certificate.
3. View certificates from the storefront:
  - a. When placing an order on the checkout page, select **Manage existing certificates** or go to **My Account > Tax Certificate** to view all your certificates.
  - b. To view a particular certificate, select the **View Certificate** link. The certificate downloads in the PDF format. Open the PDF to view the certificate details.
4. Invalidate a certificate:

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- a. When placing an order on the checkout page, select **Manage existing certificates** or go to **My Account > Tax Certificate** to view all your certificates.
- b. Select the **Invalidate Certificate** link for the certificate that you want to delink from your account.
- c. Select **OK** in the confirmation message box.  
This delinks the certificate from your account. After the page reloads, the certificate is no longer available.

## Sync your products in WooCommerce with Avalara

Sync your WooCommerce products catalog with Avalara.

### About this task

Sync your products in WooCommerce with Avalara as you add new products or update any of the existing products. Avalara assigns the HS code to the synced products depending on the countries that you've configured outside the US.

Ensure the following:

- You've turned on **Enable sync**.
- You've selected the countries for HS Code assignment and also set up the same in nexus.



#### Note

This is a one-way product sync from WooCommerce to Avalara only.

### Steps

1. Sign in to your WordPress account and go to **WooCommerce > Settings > AvaTax**.
2. Select **Transactions outside the US (HS code classification)**.
3. Enter your **Avalara Username** and **Avalara Password** to validate your account.
4. Select your target countries for the **Select countries to assign HS codes** option.
5. Select **Sync**.

### Result

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Your WooCommerce product catalog starts synchronizing with Avalara. A success message appears after the product sync is complete.



#### Note

When syncing is in progress, you can safely leave the page. If you want to stop the product sync, select **Stop sync** and then select **Yes** in the confirmation popup. This immediately ends the product sync.

## Refund orders in WooCommerce

Fully refund your orders or do a tax-only, or a partial refund for your orders.

### About this task

The plugin supports the following refund scenarios:

- **Full refund:** To refund the entire order, set the quantity to match the original order quantity for each item you want to refund. This automatically populates the total, including tax for the refund.
- **Tax-only refund:** To refund full taxes for an order, set the refundable tax amount to match the original tax for each item. You can also partially refund the tax for one or more items within the same order. If you refund an item partially, it distributes the amount across all tax rates because AvaTax doesn't support refunds based on tax rate.

To refund an order in full after refunding only taxes, set the quantity for all items to match the original quantity. Then set the refundable tax amount to zero, or enter the refund amount for each item manually.

- **Partial refund:** To fully refund a single item in an order, set the quantity to match the original order quantity for that particular item.

To refund one or more items partially, set the quantity for that particular item or manually set the refund amount for each item.

## Steps

1. Sign in to your WordPress account and go to **WooCommerce > Orders**.

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2. Select an order and select **Refund**.
3. Set the quantity or manually input the refund amount for each item in the order that you want to refund.



#### Note

The total refund amount can't be more than the order total amount.

4. Select **Refund** to refund the order automatically.

A success message displays under the **Order notes** after the refund is successful to Avalara.

## View transactions logs

View the transactions logs for the transactions on your WooCommerce store.

### About this task

View the API requests, responses, and errors for your transactions for troubleshooting purposes.

### Steps

1. Sign in to your WordPress account and go to **WooCommerce > Status**.
2. Select the **Logs** tab.  
All your transactions appear.
3. Select the transaction for which you want to view the log and then select **View**.  
The log details for the selected transaction appear. It also displays the VAT number and VAT message if applicable.

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## Which customer address Avalara for WooCommerce use for tax calculation?

Avalara for WooCommerce uses the shipping address for tax calculation. If the shipping address is unavailable, the plugin uses the customer billing address for tax calculation.

In either case, the plugin uses the customer email address as the primary customer ID in Avalara.

## Does Avalara for WooCommerce support cross-border features to calculate duties and import taxes?

Ensure that you have set up cross-border countries in the nexus. If you're using cross-border calculation with AvaTax, the respective duties or import taxes reflect in your tax calculation automatically.

Turn on **Calculate customs duties** and sync products for HS Code assignment for your cross-border countries under **Transactions outside the US** to use this feature.

## Can I enter product prices inclusive of tax?

Yes! Avalara for WooCommerce supports calculating tax from an inclusive price. The product price includes both the tax and product cost.

Ensure that you set tax options for your store in WooCommerce. To set tax options, go to **WooCommerce > Settings > Tax > Tax options**. Set your preference under **Prices entered with tax**.

## Why am I not seeing the cross-border fees at checkout?

Ensure that you've enabled **Calculate customs duties** under **Transactions outside the US**. Check whether you've synced your products in WooCommerce with AvaTax for HS Code assignment for your cross-border countries.

Also, ensure that you've set up **Seller importer of record** under **Customer Tax Settings** in WooCommerce.

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## **Is there a limit to how many products I can sync?**

Nope! There's no limit to the number of products that you can sync.

## **Can I choose which products to sync?**

Currently, you can't choose products to sync. It syncs the full product catalog in WooCommerce with AvaTax for HS Code assignment.

## **What happens when I add a new product?**

When you add a new product, WooCommerce automatically syncs the product to Avalara AvaTax for classification. Ensure that you've enabled and set up automatic product sync for cross-border classification.

## **What happens when I update a product?**

It depends on the product fields that you update. If the product requires reclassification, it will sync again with AvaTax to assign a new HS Code automatically.

## **Can I sync products in my sandbox account?**

Yes, you can sync your WooCommerce product catalog in the sandbox environment using your Avalara sandbox credentials.