Magento 2 For Tobacco

Connector for Magento v2.2 to 2.4
Module Version: 1.0

Table of Contents

Home:

License

This project is licensed under the Open Software License 3.0 (OSL-3.0). See included LICENSE file for full text of OSL-3.0

Getting Started:

Support

For support with your AvaTax account, please visit avalara.com/technical-support. This software will not work unless you have a valid Excise and Avatax account. To obtain the required account information, please contact your Avalara representative.

Prerequisites

- Active Excise account with a company setup.
- Active Avatax account with a company setup.
- Magento running on a server that has the following:
  - Uninstall avalara/avatax-magento extension, if exists.
  - Properly configured CRON job
  - PHP CURL extensions (required by the AvaTax/Excise library)

Supported Magento Versions

supported Magento editions/versions.

- Magento 2.4.0 - 2.4.2 (as of Avalara_Excise 1.0.0)
  - ✓ Open Source (Community)
  - ✓ Commerce (Enterprise)
  - ✓ Commerce Cloud
- Magento 2.3.x (as of Avalara_Excise 1.0.0)
  - ✓ Open Source (Community)
  - ✓ Commerce (Enterprise)
  - ✓ Commerce Cloud
- Magento 2.2.x (as of Avalara_Excise 1.0.0)
  - ✓ Open Source (Community)

- ○ ☑ Commerce (Enterprise)
- ○ ☑ Commerce Cloud

Installation

Install via Composer

This is the recommended installation method as it allows you to easily update the extension in the future. **Important**: Installation must be performed by an experienced Magento developer and these instructions assume that is the case. Installation support can only be provided to developers.

Require the desired version of Avalara Excise/Avatax. Latest version can be installed by running following command:

1. `composer require avalara/excise`
2. <u>Setup the AvaTax</u> module in magento
   `bin/magento module:enable --clear-static-content Avalara_Excise bin/magento setup:upgrade`
3. `bin/magento cache:flush`
4. If you are deploying the extension to a production environment, follow the devdocs.magento.com deployment instructions

Configuration

1. To configure the extension, go to `Stores > Settings > Configuration > Sales > Tax.`
2. Details on configuring each of the extension features:
   - Avatax Excise - General
   - Avatax - Address Validation
3. In the Magento admin, go to `Stores > Settings > Configuration > Sales > Shipping Settings.` Click on the **Origin** section. Enter the address that will be used as the origin or **Shipped From** location in Avalara's Excise tax calculation. **It is _required_** that you specify a postal code in the origin address, no matter what country is specified. Otherwise, you will get errors in checkout and when saving customers.

Release Notes

Extension Features

- Excise tax calculation.

- Sales tax calculation.
- Shipping and billing address validation.
- Submitting invoice and credit memo transactions to Avatax.
- Application logger for troubleshooting

Uninstall Extension

1. Run this command in the root of your Magento installation directory:
   `bin/magento module:uninstall Avalara_Excise`
2. If you installed the module using Composer, run these commands in the root of your Magento installation directory: `composer remove avalara/excise`

   If you installed the module by copying files, run these commands in the root of your Magento installation directory: `rm -rf app/code/Avalara/Excise`
3. Run the following queries in your Magento database:
   `-- Remove Excise tables (these tables will be in the sales database in split-database mode) DROP TABLE `excise_queue`;`
4. `DROP TABLE `excise_log`;`

<u>Excise Sales Tax:</u>

Overview

Tax calculation typically happens during checkout process like shopping cart, checkout. This extension allows Magento to calculate excise tax and sales tax, additionally provides an address validation feature. Extension will calculate tax as soon as customers enter postal code either on the Estimate Shipping and Tax section on shopping cart or Shipping Address form during the checkout process. Tax will be calculated by calling Excise API. The API will identify the products based on the product configuration and will calculate the applicable excise or sales tax.

To use excise API for tax calculation, make sure you set Product Custom attributes values.

A cronjob task runs every five minutes to send invoices and credit memos to Avalara Excise. The status of each pending item can be found in the AvaTax Queue in `Stores > AvaTax Queue.` The Magento CRON must be configured for the extension to work properly.

Configuration

1. In the Magento admin, go to `Stores > Settings > Configuration > Sales > Tax.` Click on the Avatax Excise - General section.
2. Review each of the options in this section and input the appropriate value.

Configuration

Scope: Default Config ▾ ❓

Save Config

GENERAL	⌄
CATALOG	⌄
SECURITY	⌄
CUSTOMERS	⌄
SALES	⌃

Sales

Sales Emails

PDF Print-outs

Tax

Checkout

Shipping Settings

Multishipping Settings

Delivery Methods

Google API

Payment Methods

3D Secure

Gift Cards

Address Cleansing

YOTPO	⌄
DOTDIGITAL	⌄
SERVICES	⌄
ADVANCED	⌄

AvaTax Excise - General ⊖

Enable
[store view]
Yes ▾

AvaTax Extension Version: 1.0.0
[store view]

Connection Settings
[store view]

Sandbox Mode
[store view]
Yes ▾

Excise Account Number
[store view]
ravi.thakur

Excise License Key
[store view]
••••••

Excise Company
[store view]
ATE Connector - Magento ▾

Choose the company to use. If you don't see values in this dropdown, then enter values into the **Excise Account Number** and **Excise License Key** fields above.

[store view] **Validate Excise License**

AvaTax Account Number
[store view]
2000169589

AvaTax License Key
[store view]
••••••

AvaTax Company
[store view]
DEFAULT - 4.1 Dev Company ▾

Choose the company to use. If you don't see values in this dropdown, then enter values into the **AvaTax Account Number** and **AvaTax License Key** fields above.

[store view] **Validate AvaTax License**

Tax Mode
[store view]
Estimate Excise tax ▾

- **Estimate Tax** — AvaTax tax estimation will run during checkout, but completed orders will not be submitted to AvaTax.
- **Estimate Tax & Submit Transactions to AvaTax** — AvaTax tax estimation will run during checkout and invoices and credit memos will be submitted to AvaTax.

Commit Submit Transaction
[store view]
Yes ▾

Taxable Countries
[store view]

United States

Current version supports excise tax calculation for United States only

Default Shipping Code
[store view]

Mention the Shipping Code as per your Avalara account settings, if this field is kept empty 'FR' will be used as a default value.

AvaTax Excise – Advanced
[store view]

Enable Logging
[store view]
Yes ▾

Log request response on Magento application

Logging Mode
[global]
Database ▾

Keep Database Logs Of Last 'X' Days
[global]
90

The numeric value in this field will determine the last number of days of logs that will be kept in the database table. If the value is empty logs will never be deleted from database table.

API Timeout
[store view]
10

Value would be in seconds.

Keep Queue Entries Of Last 'X' Days
[global]
180

The numeric value in this field will determine the last number of days of queue entries that will be kept in the database table. If the value is empty entries will never be deleted from database table.

AvaTax – Address Validation ⊖

Enable Address Validation
[store view]
Yes ▾

Validate shipping address once enabled

Enable Billing Address Validation
[store view]
Yes ▾

Validate billing address once enabled

Enabled Countries
[store view]

United States

Current version supports excise tax calculation for United States only

Allow Customer To Choose Original Address
[store view]
Yes ▾

Set this to **Yes** to allow the user to choose between the original and validated addresses (valid address will be selected by default). If set to **No**, user will be required to use the validated address or update their original address. This setting is ignored in the backend and the user will always have a choice.

Address Validation Instructions
[store view]

To ensure accurate delivery, we suggest the changes highlighted below. Please choose which address you would like to use. If neither option is correct, edit your address.

When user progresses to the **Review & Payments** step of the checkout, this text will be displayed above the **Suggested Address** and **Original Address** checkboxes.

Address Validation Error Instruction
[store view]

We were unable to validate your address. <p class="error-message"></p> If the address below is correct then you don't need to do anything. To change your address, click here.

This text will be displayed when there is an error in the address validation process. The element assigned the "error-message" class will be filled with the error message summary returned by AvaTax.

3. The comment text underneath each of the options in this section should explain the purpose of the setting.

Product Attributes

Custom product attributes are defined on `Catalog > Products.` Custom attributes are defined under "Excise Attributes" tab.

Excise Product Code - This value is tax class configured in Avatax. If this is set as none then product SKU will be sent instead in the API call.

Unit Of Measure - The Measurement type, the measure value in which the product is defined.

Unit Quantity Unit Of Measure - Product unit quantity of measure.

Unit Volume Unit Of Measure - Product volume unit of measure.

Purchase Unit Price - The purchase price per unit.

Purchase Line Amount - The purchase line amount.

Unit Quantity - Product unit quantity.

Alternative Product Content - This field is required for products having alternate fuel content.

Unit Volume - Volume of a unit.

Tax Breakup

The module will provide the tax break up on the order, invoice and credit memo detail page in the Magento backend. This will enable the administrator to see the components that are part of the tax. The tax will be broken down into 'sales tax', 'excise tax' and 'shipping tax' components. The breakup will also be available on the line-item level to see the tax per item in the order, invoice and credit memo.

The breakup will also be available in the order, invoice and credit memo listing pages in the Magento backend which can be downloaded as a report. This will enable the administrator to have the information for reporting and reconciliation of transactions.

AvaTax Queue

The AvaTax Queue functionality only works when **Tax Mode** is set to **Estimate Tax & Submit Transactions to AvaTax.** The following section assumes that AvaTax queueing is enabled. To view the AvaTax Queue, in the Magento admin, go to `Stores > AvaTax Queue.`

When invoices and credit memos are created in Magento, new records are added to the AvaTax Queue with a **pending** status. If a CRON job is properly configured, then every 5 minutes, all pending records will be submitted to AvaTax with a **Document Type** of **Sales Invoice** or **Return Invoice**, depending on whether the record is a Magento invoice or credit memo (respectively). If there are errors submitting the record, Magento will attempt to resend the record for the number of times configured in the **Max Queue Retry Attempts** constant property, this is set for maximum 3 attempts.

If you are in a development or staging environment and do not have a CRON job setup, or you want to send invoice and credit memo records individually you can manually send these records to AvaTax using the **Post to AvaTax** button on the invoice and credit memo details page in the Magento admin.

AvaTax Logging

The logging functionality built into this extension is for debugging purposes. If you are experiencing issues with this extension, you can review the logs to see if they provide any details about the issues you are experiencing.

This extension can log information in two locations: In files (in the var/log/ directory) and/or in the database (in `Stores > AvaTax Logs`), depending on the logging settings you have configured in `Stores > Settings > Configuration > Sales > Tax > AvaTax Settings > Logging Settings.`

Magento Order and Invoice Numbers

If you are using AvaTax with a **Tax Mode** of **Estimate Tax & Submit Transactions to AvaTax**, when Invoices or Credit Memos get sent to AvaTax, the Invoice/Credit Memo 'id' will be sent in the **InvoiceNumber** field prefixed with 'INV' or 'CM' for invoice and credit memo, respectively. The Magento Order Number will be sent in the **CustomString** field.
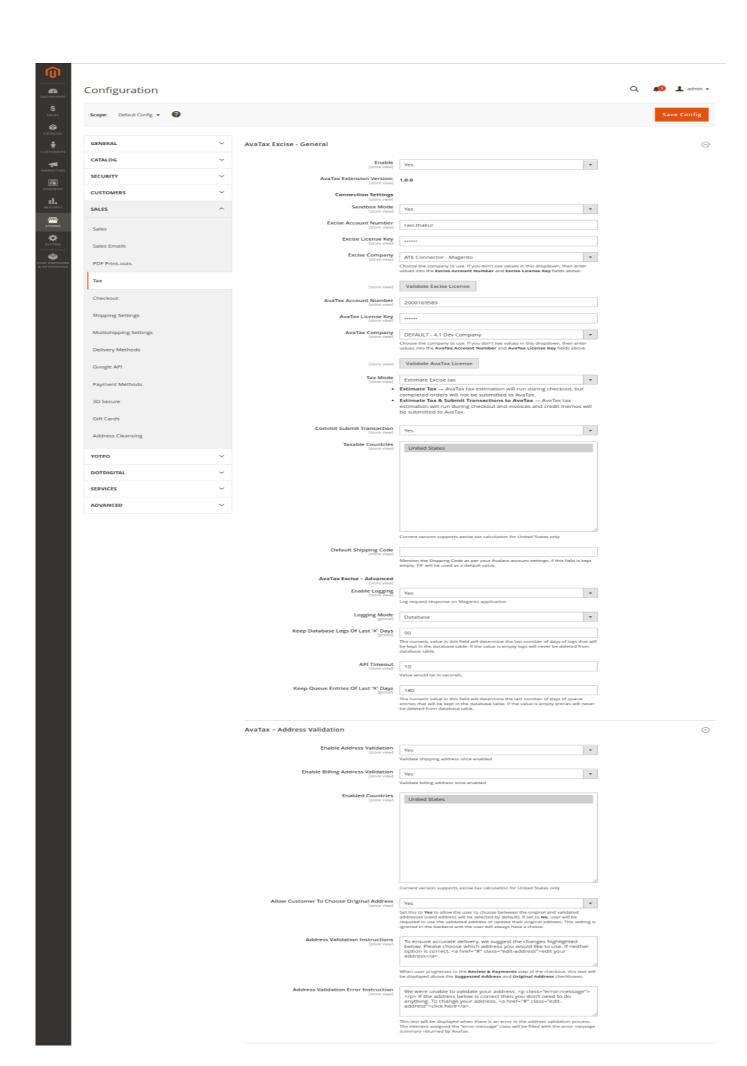
Address Validation:

Overview

This extension implements address validation in nearly every area where an address can be entered:

- Frontend Checkout
- Frontend add/edit customer address
- Backend order creation
- Backend add/edit customer address

The following sections explain how address validation works in the four areas listed above. Note: Address validation is not enabled for virtual orders (orders where only a billing address is required).
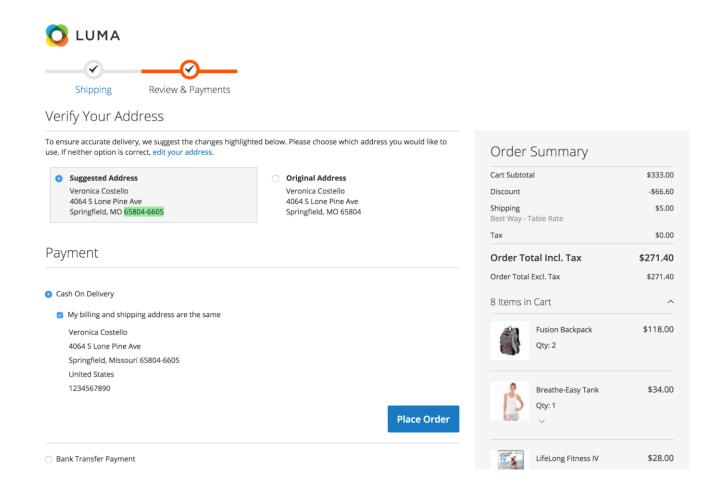
Configuration

1. In the Magento admin, go to `Stores > Settings > Configuration > Sales > Tax.` Click on the **AvaTax - Address Validation** section.
2. Review each of the options in this section and input the appropriate value.

Configuration

Scope: Default Config

Save Config

GENERAL
CATALOG
SECURITY
CUSTOMERS
SALES
- Sales
- Sales Emails
- PDF Print-outs
- **Tax**
- Checkout
- Shipping Settings
- Multishipping Settings
- Delivery Methods
- Google API
- Payment Methods
- 3D Secure
- Gift Cards
- Address Cleansing

YOTPO
DOTDIGITAL
SERVICES
ADVANCED

AvaTax Excise - General

Enable
[store view]
`Yes`

AvaTax Extension Version:
[store view]
1.0.0

Connection Settings
[store view]

Sandbox Mode
[store view]
`Yes`

Excise Account Number
[store view]
`ravi.thakur`

Excise License Key
[store view]
`••••••`

Excise Company
[store view]
`ATE Connector - Magento`
Choose the company to use. If you don't see values in this dropdown, then enter values into the **Excise Account Number** and **Excise License Key** fields above.

[store view]
Validate Excise License

AvaTax Account Number
[store view]
`2000169589`

AvaTax License Key
[store view]
`••••••`

AvaTax Company
[store view]
`DEFAULT - 4.1 Dev Company`
Choose the company to use. If you don't see values in this dropdown, then enter values into the **AvaTax Account Number** and **AvaTax License Key** fields above.

[store view]
Validate AvaTax License

Tax Mode
[store view]
`Estimate Excise tax`
- **Estimate Tax** — AvaTax tax estimation will run during checkout, but completed orders will not be submitted to AvaTax.
- **Estimate Tax & Submit Transactions to AvaTax** — AvaTax tax estimation will run during checkout and invoices and credit memos will be submitted to AvaTax.

Commit Submit Transaction
[store view]
`Yes`

Taxable Countries
[store view]
`United States`

Current version supports excise tax calculation for United States only

Default Shipping Code
[store view]

Mention the Shipping Code as per your Avalara account settings, if this field is kept empty 'FR' will be used as a default value.

AvaTax Excise – Advanced
[store view]

Enable Logging
[store view]
`Yes`
Log request response on Magento application

Logging Mode
[global]
`Database`

Keep Database Logs Of Last 'X' Days
[global]
`90`
The numeric value in this field will determine the last number of days of logs that will be kept in the database table. If the value is empty logs will never be deleted from database table.

API Timeout
[store view]
`10`
Value would be in seconds.

Keep Queue Entries Of Last 'X' Days
[global]
`180`
The numeric value in this field will determine the last number of days of queue entries that will be kept in the database table. If the value is empty entries will never be deleted from database table.

AvaTax – Address Validation

Enable Address Validation
[store view]
`Yes`
Validate shipping address once enabled

Enable Billing Address Validation
[store view]
`Yes`
Validate billing address once enabled

Enabled Countries
[store view]
`United States`

Current version supports excise tax calculation for United States only

Allow Customer To Choose Original Address
[store view]
`Yes`
Set this to **Yes** to allow the user to choose between the original and validated addresses (valid address will be selected by default). If set to **No**, user will be required to use the validated address or update their original address. This setting is ignored in the backend and the user will always have a choice.

Address Validation Instructions
[store view]
`To ensure accurate delivery, we suggest the changes highlighted below. Please choose which address you would like to use. If neither option is correct, <a href="#" class="edit-address">edit your address</a>.`
When user progresses to the **Review & Payments** step of the checkout, this text will be displayed above the **Suggested Address** and **Original Address** checkboxes.

Address Validation Error Instruction
[store view]
`We were unable to validate your address. <p class="error-message"></p> If the address below is correct then you don't need to do anything. To change your address, <a href="#" class="edit-address">click here</a>.`
This text will be displayed when there is an error in the address validation process. The element assigned the "error-message" class will be filled with the error message summary returned by AvaTax.
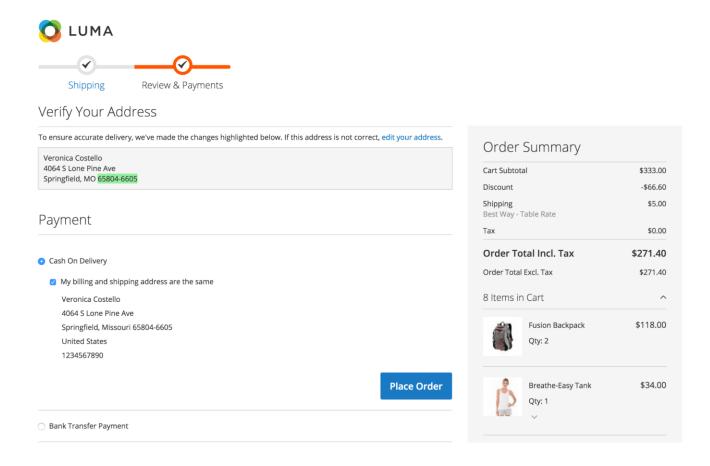
Frontend Checkout

When a guest or a signed in customer proceeds from the **Shipping** step to the **Review & Payment** step, the address they submitted will be sent to AvaTax to be validated.

If the configuration setting **Allow User To Choose Original (Invalid) Address** has been set to **Yes**, both the Suggested Address and Original Address will be displayed:
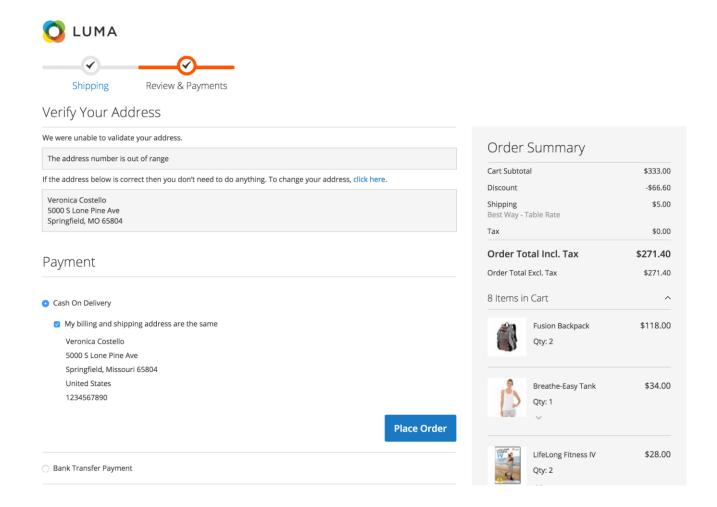
If the configuration setting **Allow User To Choose Original (Invalid) Address** has been set to **No**, only the valid address will be displayed to the user:

If a signed in customer is checking out and their address gets validated, the address the customer selected will automatically be set to the suggested address once the customer proceeds to the **Review & Payment** step. If the customer selects the original address, their customer address will be updated to that address. This will happen every time the user selects a different address.

If the user submits an address that AvaTax cannot validate, an error message will be displayed to give some indication to the user that their address may be incorrect. This does not disrupt the checkout process:

If the address is already valid or if the address is from a country that is not on the list of **Enabled Countries** for address validation, nothing will be displayed to the user.

If the user clicks the **edit your address** or **click here** links in the instructions, they will be navigated back to the **Shipping** step.

Frontend Add/Edit Customer Address

When a customer is adding or editing an address tries to save that address, they will be presented with a modal displaying this **Verify Your Address** form:

If the customer clicks the **x** icon, the **edit your address** link, or the **Edit Address** button, the modal will close and the form will not be submitted. If the customer clicks **Save Address** with the suggested address selected, the fields which are highlighted will be updated in the form and the form will be submitted. Otherwise, the original address will be submitted without any modifications to the form fields. If the config field **Allow User To Choose Original (Invalid) Address** is set to **No**, and the customer clicks save address, the valid address will be submitted. If the API response returns an error, that error will be displayed to the customer just as it is in the checkout. The customer will then have the option of either editing their address or saving it. If the address is not located inside one of the enabled countries or is already valid, nothing will be displayed to the user and the form will be submitted normally.

Backend Add/Edit Customer Address

Address validation in this area is triggered by clicking the Validate Address button at the bottom of an address form:

If the address is already valid, a success message will appear displaying the message *"This address is already valid"*. If the address is not from one of the enabled countries, an error message will appear displaying the message *"Address validation is not enabled for the country you selected"*. After the address has been validated, the suggested address will automatically be selected and the form will be updated. Selecting either address will update the form with that address. Clicking the **edit your address** link will scroll to the top of the page.

If the address is unable to be validated (see screenshot below), a message will be displayed indicating the reason why the validation failed (e.g. *"An exact street name match could not be found"* or *"The address number is out of range"*). The customer address can be revised by clicking the provided link; saving the customer record at this point will save the address as entered.

Backend Order Creation

Address validation in this area is also triggered by clicking the **Validate Address** button of the bottom of the Billing or Shipping Address forms. If **Same As Billing Address** is checked, the **Validate Address** button will not exist below the Shipping Address form. After the Validate Address button is clicked, a modal will appear displaying the same form that is displayed in the frontend add/edit customer address area:

If the address is already valid, a success message will appear displaying the message *"This address is already valid"*. If the address is not from one of the enabled countries, an error message will appear displaying the message *"Address validation is not enabled for the country you selected"*.

Support

Contact Avalara for any support requests, either via support@avalara.com or via this page.

END OF DOCUMENT