



LAUNCH GUIDE



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Set-Up

1. Admin Section / Settings

- Click on your profile photo on the top right and select 'Settings'
- Make sure you are under 'Company Settings' and select 'Integrations' towards the bottom right
- Choose 'Accounting' and scroll to 'Chart of Accounts'
- Under line item type, select the Products & Services to connect to (mapped from QBO)
 - ◆ Prep Work: Create a new Products & Services line item for Avalara tax in QBO

Line item type	QuickBooks Online Item
Avalara Invoice Tax	Test item
Bills	Accounts Payable (A/P)
Bills Items	Cost of Goods Sold

2. Admin Section / Company Contact Information

- Click on your profile photo on the top right and select 'Settings'
- Make sure you are under 'Company Settings' and select 'Setup' towards the bottom left
- Select 'Company Contact Info' which is the first tab on the pop up window
- Star your company's main billing address (this will send to Avalara as your 'from' address)
- Note that changing this address will alter your tax calculations in Avalara

The screenshot shows the 'Setup' window with the 'Company Contact Info' tab selected. The tab contains a list of addresses for billing, shipping, and fulfillment. The 'Billing Address' is marked as the default. The 'Office' address is also listed.

Add or update the billing and shipping addresses that appears at the bottom of your sales and purchase forms.		Learn More
Billing Address	250 Merton St Toronto ON M5S2J7 Canada	★ Default
Blank	Arizona United States	☆
Fulfillment House	1 Yonge Street Toronto Ontario Canada	☆
Head Office	2515 Chanute Trail Maitland Florida 32751 United States	☆
Home Address	123 Main Street Toronto 55199 Canada	☆
Office	123-456-7890 Toronto M2P 0F6 Canada	☆

3. Admin Section / Avalara

- Click on your profile photo on the top right and select 'Settings'
- Make sure you are under 'Company Settings' and select 'Integrations' towards the bottom right
- Choose 'Avalara'
- Enter your Avalara Account ID (provided during your AvaTax account activation)
- Enter your Avalara License Key (provided during your AvaTax account activation)
- Click Connect To Avalara Production

The screenshot shows the 'Integrations' page with a sidebar on the left containing links for Marketing, Credit Card, Accounting, SAGE, and Avalara (which is highlighted). The main area has two input fields: 'Avalara Account ID:' and 'Avalara License Key:'. Below these are two buttons: 'Connect to Avalara Production' and 'Connect to Avalara Sandbox'. A 'Done' button is in the top right corner.

4. Exploring The Tax Set-Up In commonsku

Keys to Avalara Page (once logged in):

The screenshot shows the Avalara configuration page. At the top is a button 'Disconnect from Avalara Sandbox'. Below are two dropdown menus: 'Default Company:' with 'Commonsku' selected, and 'Default Category:' with 'MERCHANDISE' selected. At the bottom are two checkboxes: 'Disable document recording' (unchecked) and 'Test mode (mode)' (checked).

Default Company - Select your company from the drop down menu (set up in Avalara)

Default Category - This category will default on each project for your entire company and can be changed as needed

Default Shipping Category - this category will default on each project for your entire company and can be changed as needed

Disable Document Recording - When turned on, tax will not be posted or committed to Avalara. This would be used if your Avalara commits are being done by another system (ERP).

Test Mode:

- When turned on, this will provide a drop down for the tax code to allow you to test while others are still working in the system under Zip2Tax
- When turned off, all projects will default to Avalara tax without the option to change

Important To Note:

While in test mode, we recommend communicating with your team that a drop down will now appear and not to select Avalara as you will need to go back and change/delete anything that has been recorded in Avalara and exported to Avalara Production.

Category - Editable field that will appear to your team when they are selecting tax codes on projects. May change at any time, however, best practice is to select final category names during initial setup to ensure consistency.

Avalara tax code - Non-editable field that pulls the tax code directly from Avalara

Avalara tax code description - Non-editable field pulls the Avalara tax code description directly from Avalara

5. Adding/Deleting Your Tax Codes In commonsku

Note: Each company is responsible for researching, understanding, and selecting the final tax codes that are correct for your company.

Category	Avalara tax code	Avalara tax code description
+ Add New Category + Import Categories + Add Preset Categories		

+ Add New Category: Use for adding single codes

- Click Add New Category
- Enter Category name
- Select Avalara tax code from pre-populated list
- Click Save

+ Import Categories: Use for uploading multiple codes at one time

- Click Import Categories
- Import your .csv file containing the following headers:
 - ◆ category
 - ◆ avalara_tax_code
- Click drop here to select your file or drag and drop your file in the 'drop here' box
 - ◆ If the formatting is incorrect, it will return an error indicating which rows need to be updated

- ◆ If the formatting is correct, it will show you a preview of the codes to be imported
- Once imported successfully, click import

+ Add Preset Categories: Choose from commonly used industry specific tax codes

- Click Add Preset Categories
- Select the applicable categories and click 'Add Categories'

- Delete Or Edit A Tax Code

- Hover over the code you wish to delete and click delete
- Hover over the code you wish to edit and edit the category text or change the tax code

Category	Avalara tax code	Avalara tax code description		
Test	OD010502	Automobile sales and lease / Trade-in credit	Edit	Delete

6. Assign an Avalara tax exempt category to a customer

- Select 'Sales' in the left navigation
- Choose the 'Clients' subtab
- Click the client to update
- From the 'Clients' slide-out menu, select Edit Detail from the Actions drop-down menu
- Near the bottom, select their Entity Use Code from the drop down menu

Adding Tax To Projects in commonsku

1. Applying tax to Estimates & Sales Orders

- Convert your presentation or add items directly to an estimate or sales order
- Select Avalara under Default Tax and click OK on the pop-up

Billing Address	Main Shipping Address	Terms	Currency
Aaron	Aaron	Net 30	USD
US HQ	US HQ	In Hands Date	Default Margin
		2021-11-05	
Average Joe's 7991 S Elati Littleton, CO, United States 80120 aaron@commonsku.com	Average Joe's 7991 S Elati Littleton, CO, United States 80120 aaron@commonsku.com	Default Tax 80120 Littleton Arapahoe CO Avalara Exempt (0%)	Customer PO

- Select your billing and shipping addresses
 - ◆ If shipping to multiple addresses, create a Split Shipment (or similar address) for the tax to be applied during invoicing
 - An invoice needs to be created for each shipping address to export to Avalara properly
 - **Tip:** If there are multiple shipments and a client would like to see tax on the Sales Order or Estimate, you can add service line items with tax to be deleted during final invoicing.
- Edit each item to choose the correct 'Avalara Item Code'
 - ◆ The 'Avalara Item Code' will apply the same tax to all costs associated with each item.

Edit Item

Close

Product Name	Supplier	SKU
Igloo® Akita Hard Lined Cooler	Gemline	9098
Avalara Item Code		
MERCHANDISE		
FOOD_CANDY		
FOOD_GENERAL_SSUTA		
robial lining Product Color: Black 1 color/1 location print.		



- You have the option to calculate tax at the estimate, sales order, or invoice level

- ◆ The tax is not committed to Avalara until the invoice is exported to QBO
- ◆ If you need to recalculate the tax, you must select a different shipping address
- ◆ A valid shipping address is required to calculate tax and the tax from that address will be applied to the entire project
 - **Tip:** If split shipment (or other) are selected, you must wait to calculate the tax through the system on the final invoices once separated out by each address

Subtotal	\$3208.74
<div style="background-color: #00a0e3; color: white; padding: 5px 20px; display: inline-block; border-radius: 3px;">Calculate Tax</div>	
Total	\$3208.74
<input type="checkbox"/> Hide Totals	

2. Tax on Invoices

Single Shipping Address:

- Create invoice for all items on the sales order
- If all information is correct, click calculate tax
- This invoice is now ready to be exported (see page 7)
- **Note:** Tax is not committed to Avalara until exported (see page 7)

Multiple Shipping Addresses:

- Create an invoice for each shipping address
- If all information is correct, click calculate tax on all invoices
- These invoices are now ready to be exported (see page 7)
- **Note:** Tax is not committed to Avalara until exported (see page 7)

Committing Tax To Avalara from commonsku

Single Shipping Address:

- Select 'Finance' in the left navigation
- Select the 'Invoicing' subtab
- Select 'Invoices' from the drop down menu
- Select the invoice(s) you wish to export by selecting the check box(es)
- Click 'Export to Quickbooks Online'
 - ◆ Once exported, any changes to the invoice must be made to QBO, Avalara and commonsku

Quickbooks Online Tax View:

- The tax will export over as exempt and classified under the QBO line item selected in the Admin section during setup (invoice totals match + backup for data)
- The tax will be bulked together per tax rate

CO CO COUNTY TAX Invoice #23978	1	7.65	7.65
CO CO STATE TAX Invoice #23978	1	88.70	88.70
CO CO SPECIAL TAX Invoice #23978	1	33.65	33.65

Avalara Tax View:

- Your tax commitment will be captured under your transactions in your Avalara Production
- The Doc Code is your project number_invoice number

Next Steps

commonsku Go-Live Checklist

Admin:

- ☐ Entity codes are entered
- ☐ Internal tax code guide distributed to team

Projects:

- ☐ Choose a date to switch over
- ☐ Export any invoices pending export over to QBO
- ☐ Send dump of data to Avalara
- ☐ Everything invoiced following that date is switched to Avalara tax by the accountant

SHOPS:

- ☐ On the date of switching, make sure to update the tax to Avalara on:
 - ☐ Company shops with credit cards
 - ☐ Pop Up Shops collecting tax
- ☐ Any orders that get invoiced, confirm Avalara is selected on the final invoice before it's sent to the client