



Managely Integration with Avalara

MANAGELY™

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Introduction

Avalara AvaTax is a cloud-based service that receives information from Managely proposals, invoices, and credits to calculate sales taxes. AvaTax delivers real-time sales tax calculations based on up-to-date sales and uses tax rules for the United States, U.S. territories, and Canada.

Managely passes information to the AvaTax tax service, and AvaTax calculates the taxes and passes the tax information back to Managely.

Prerequisites

To use AvaTax with Managely, you must meet these requirements:

- Managely Pro
- You must have an account with Avalara with a license key and account number.

Note: Avalara provides a username and password to log into the Avalara web site.

Setting up Managely and Avalara AvaTax Integration

Before you can use AvaTax with Managely, you must complete the following:

1. In Managely Host, Avalara integration must be activated. A Bold Group employee does this.

2. In Managely, create a new tax code to use for AvaTax (Setup > Accounting > Sales Tax). Enter zero for the percent. Any proposal, invoice, and credit that has this tax code will go to Avalara AvaTax.

The screenshot shows the 'Edit Sales Tax' form in Managely. The form has a blue header with the title 'Edit Sales Tax' and a close button. The fields are as follows: 'Sales Tax Code' is set to 'AvaTax'; 'Description' is set to 'Avalara Tax'; 'Tax Agency' is a dropdown menu; 'Recurring' is a toggle switch set to 'YES'; 'Non-Recurring' is a toggle switch set to 'YES'; 'Base' is a toggle switch set to 'YES'; 'Breakout' is a toggle switch set to 'YES'; and 'GL Account' is set to '12565 - Sales Tax'. At the bottom, there are 'Save' and 'Cancel' buttons.

Note: Non-taxable customers (or Sites, as we manage it in Managely) must have a tax-exempt code. Managely sends that to Avalara for a given invoice.

3. In Managely, complete the fields on Third Party Services for Avalara. (Setup > Utilities > Third Party Services > Central Station Integrations tab)

The screenshot shows the 'Edit Connection' form in Managely. The form has a blue header with the title 'Edit Connection' and a close button. The fields are as follows: 'Name' is set to 'Avalara'; 'Endpoint' is set to 'Endpoint'; 'Authentication' is a dropdown menu set to 'Dealer'; 'Sales Tax Code' is a dropdown menu; 'Username' is a text field; 'Password' is a text field; 'Company Code' is a text field; and 'Production Mode' is a toggle switch set to 'YES'. At the bottom, there are 'Save' and 'Cancel' buttons.

- **Endpoint:** Leave this field blank.
 - **Authentication:** Choose dealer (most common choice) to use Avalara across the entire dealer. User means this is specific to the current user.
 - **Username:** This comes from Avalara.
 - **Password:** This comes from Avalara.
 - **Company Code:** This comes from Avalara.
 - **Production Mode:** Set this to YES.
4. In AvaTax, set up your company. Proposals and invoices cannot go to AvaTax until the AvaTax company is set up. AvaTax setup may include setting up tax rules, Nexus, tax codes, exemptions, locations, items, and parts. Read the AvaTax documentation for information. By default, AvaTax taxes miscellaneous charges based on the state. In AvaTax, you can change this where needed.

Note: If you have items and parts that are non-taxable, on the item setup and part setup, set the **Taxable** switch to **NO**.

Using the Avalara AvaTax Integration

When you enter a proposal or invoice, information is automatically sent to AvaTax. The calculated tax is sent from AvaTax back to the proposal or invoice so that it is visible. Tax is calculated based on the Site zip code in Managely that is sent to Avalara.

Credits and Tax Calculation

When you enter a credit, a calculated tax refund is sent from AvaTax back to the credit memo so that it is visible.

Non-Taxable Customers

Non-taxable customers (or Sites, as we manage it in Managely) must have a tax exempt code. Edit a customer site and enter this in the **Tax Exempt** field. Managely sends that to Avalara for a given invoice.

Non-Taxable Items and Parts

If you have items and parts that are non-taxable, read the instructions from Avalara; create a non-taxable code(s) in AvaTax; and create the rule that applies to the code. In Managely, for items and parts, set the **Taxable** switch to **NO**.

Deactivating AvaTax Tax Integration

If you need to deactivate the integration, delete the connection in the Third Party Integrations.