Managely and Avalara

07/17/2025 4:41 pm EDT

Avalara – a Managely integrator who calculates tax for Managely invoices based on the customer's zip code.

How does a customer get Avalara? - We direct them to Avalara. They set up their account with Avalara. They bring their Avalara credentials back to our professional services team, which helps them set it up.

How to set up the Avalara integration -

1. Log in to the Managely host portal > Select the customer > Services tab > Other section > Switch Avalara to "Yes".
2. Log in to the Managely database itself, and create a new tax group named Avalara. It should have a 0.00% tax.
3. In the Setup Preferences tables, set the new Avalara tax group as the default for the database.
4. In the Central Station Integration Setup Table > Third Party Integration > Add the credentials from Avalara and select the Avalara tax group you created.
5. Log in to Avalara and create invoice items you expect to bill and tax for in Managely. Link those Avalara items to their equivalent items/parts in Managely. **Note** – You do have to link each Managely item to an item in Avalara (SO allows you to adjust tax by item type rather than individual items, which would be an improvement and something to consider for the future).

How it Works

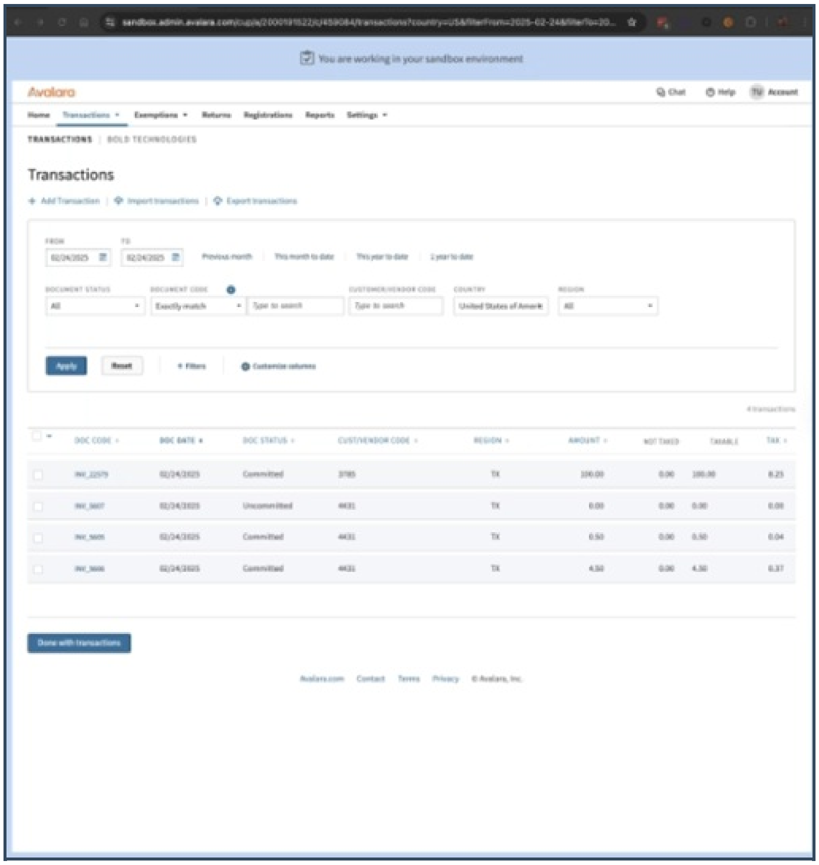
After setting up, the Avalara integration is automatic. Whenever you create an invoice in Managely using the Avalara tax group, that same invoice will appear in Avalara. Avalara will auto-calculate the invoice tax and send that info back to Managely. The tax will then show on the invoice in Managely, the same as it normally would. Avalara will also send Managely estimated tax on things like proposals.

Avalara uses the customer site's zip code to determine taxes. It specifically uses the site zip code, not the bill to zip code, and not the overall customer zip code. It uses the zip code associated with the site the invoice is for. *We don't know what the system will do if there is more than one site on the invoice. Development was tasked to look into this.*

Committed vs. Non-Committed Items

Committed is not a Managely designation; it only applies to Avalara. In Avalara, an invoice is considered uncommitted until you print it or pay it, at which point it becomes committed. Avalara only shows committed invoices in their reports. The only reason this matters to Managely support is that in Managely, all invoice amounts are immediately included in our reports, so this could cause differences between Managely and Avalara reports. However, at the end of the month, Avalara will commit any uncommitted invoices for that month, regardless of whether the invoices were printed or paid. Which means this situation can only cause differences in current/future months, not past months.

For visualization, here is what Avalara looks like when our customers log in to it directly.


You are working in your sandbox environment
Avalara
Chat
Help
Account
Home
Transactions
Exemptions
Returns
Registrations
Reports
Settings
TRANSACTIONS
BOLD TECHNOLOGIES
Transactions
Add Transaction
Import transactions
Export transactions
Previous month
This month to date
This year to date
1 year to date
Exactly match
United States of America
Apply
Reset
Filters
Customize columns
DOC CODE
DOC DATE
DOC STATUS
CUST/VENDOR CODE
REGION
AMOUNT
NOT TAXED
TAXABLE
TAX
Committed
Uncommitted
Done with transactions
Avalara.com
Contact
Terms
Privacy
© Avalara, Inc.