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Overview

The purchase of the AvaTax *Pro* product provides your organization access to tax research for approximately 1,000 categories of products, services, and charges. This guide is designed to provide an approach to expedite the set-up and tax code selection process necessary to begin using the AvaTax Service, and utilizing the taxability rules associated with AvaTax System Tax Codes to determine the tax calculated for each of your organization's product and service offerings.

There are four primary elements of the AvaTax Service that must be configured to successfully generate a sales tax calculation utilizing AvaTax tax rules for your organization's estimates, quotes, sales orders, invoices, and returns:

- Company Definition
- Nexus Selection
- Tax Code Selection
- Tax Code Mapping

The AvaTax Pro process offers a completely self-service user interface to facilitate the configuration of your organization's AvaTax Tax Profile (e.g. Company, Nexus, and Tax Codes). This document provides the necessary information to complete the identification and collection of the required company-specific data to begin the process, and the AvaTax tools that are made available to finish the configuration. The following documents and files are included to support the self-service process:

- AvaTax Pro Requirements – Word document
- AvaTax System Tax Codes – Excel worksheet
- Item-Tax Code Template – Excel worksheet
- Nexus Identification – Excel worksheet
- State Tax Registration Websites – Excel worksheet

Avalara offers a variety of courses through its AvaTax University program, specifically an AvaTax Dashboard course that provides instruction on the navigation of and functionality available on the Dashboard that is utilized in the Pro set-up process. This course, in addition to ERP specific courses (e.g. Great Plains, MAS, QuickBooks), are free of charge to Avalara customers, and registration is available via the Avalara User Center (www.avalara.com/usercenter).

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If there are any questions or requests for additional information in regard to this process, please contact Avalara Support. A support representative can be contacted via telephone at our toll free number 1.877.780.4848 – option 2 at the automated attendant. Standard support hours are from 6:00 a.m. Pacific through 5:00 p.m. Pacific, Monday through Friday. Requests for assistance can also be placed online via the Avalara User Center (www.avalara.com/usercenter).

Log in to the User Center, and select the *Contact Support* or *Submit a Case* menu options available on the User Center Home menu.

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Company Definition

Introduction

In order to begin utilizing the AvaTax Pro service, certain elements of the AvaTax Dashboard must be configured to recognize your organization and identify the company or companies conducting transactions from your organization's ERP or eCommerce application. The following section of the Set-Up Guide identifies the process to configure company credentials.

To begin the processing, it is necessary to gain access to the AvaTax Dashboard. Log-in credentials are forwarded to the individual at your organization performing the download of the AvaTax product from the Avalara User Center.

Required information:

- AvaTax Dashboard log-in credentials – provided during download of AvaTax product from the Avalara User Center
- Company Code – dependent on ERP application utilized by your organization – see below for code identification process

The AvaTax Service supports a multi-company configuration. If your organization utilizes multiple companies to transaction business, only one AvaTax Dashboard log-in is necessary. However, a unique Company Code is required for each company.

Company Code Identification

Your organization's Company Code(s) are dependent on the ERP/eCommerce application utilized to process business transactions. The section below identifies the location of the Company Code for the following applications:

- Dynamics GP – Great Plains
- MAS 90/200
- Navision
- QuickBooks
- Avalara Software Development Kit (SDK) – e.g. custom integration

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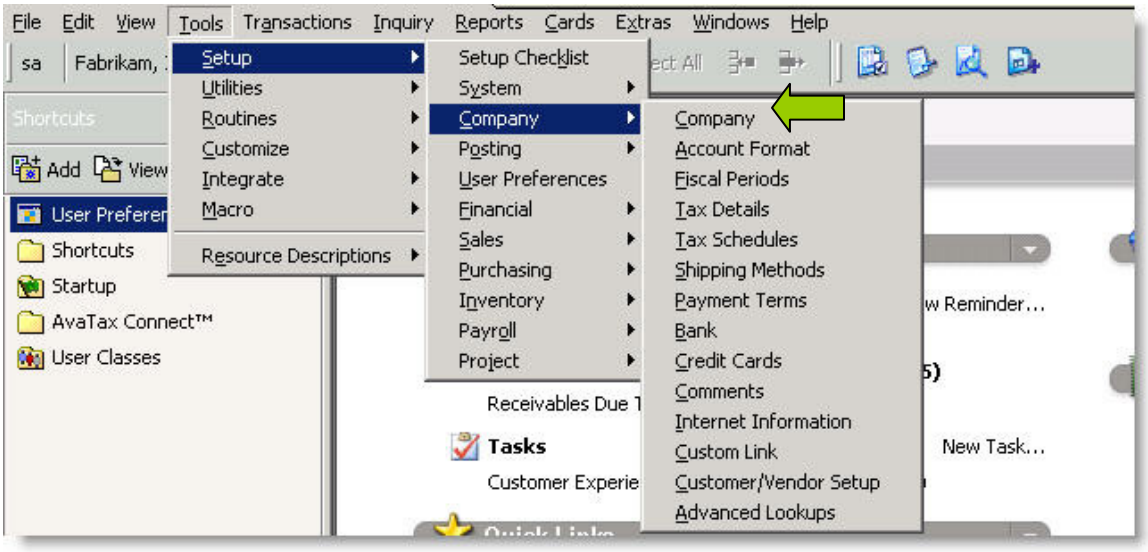
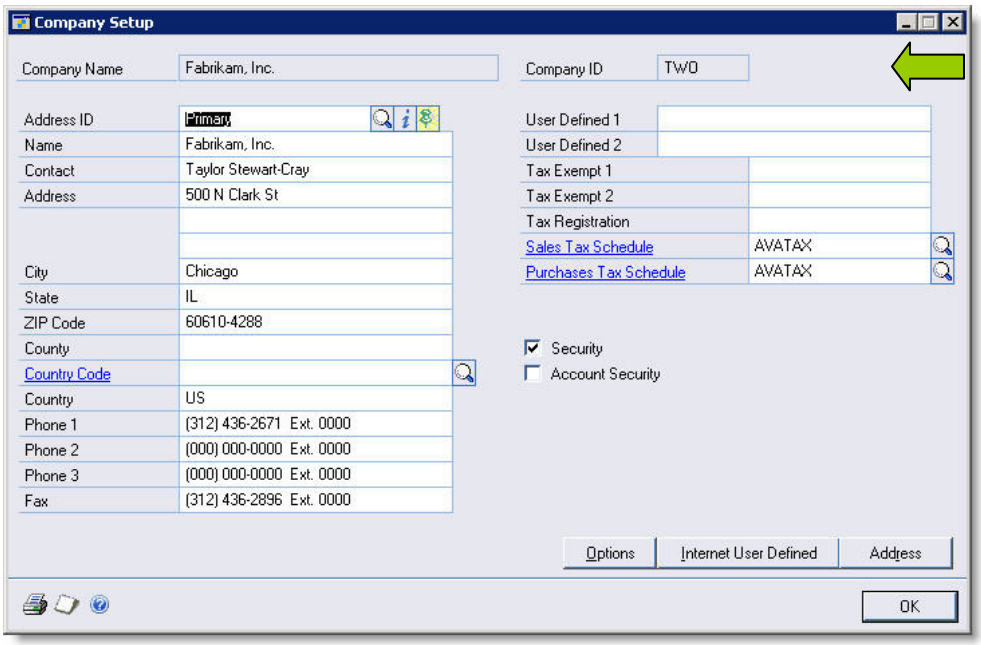
Dynamics GP – Great Plains

Avalara's standard integration for the Dynamics GP – Great Plains ERP application utilizes the Company ID (also known as the Database ID) as the Company Code. To locate the code, open the Dynamics GP application, select the Tools drop down menu, Company menu, and the Company option.



The Company Setup window is displayed. On the top right corner of the window, the Dynamics GP CompanyID is found. This is the Company Code utilized by the AvaTax service.



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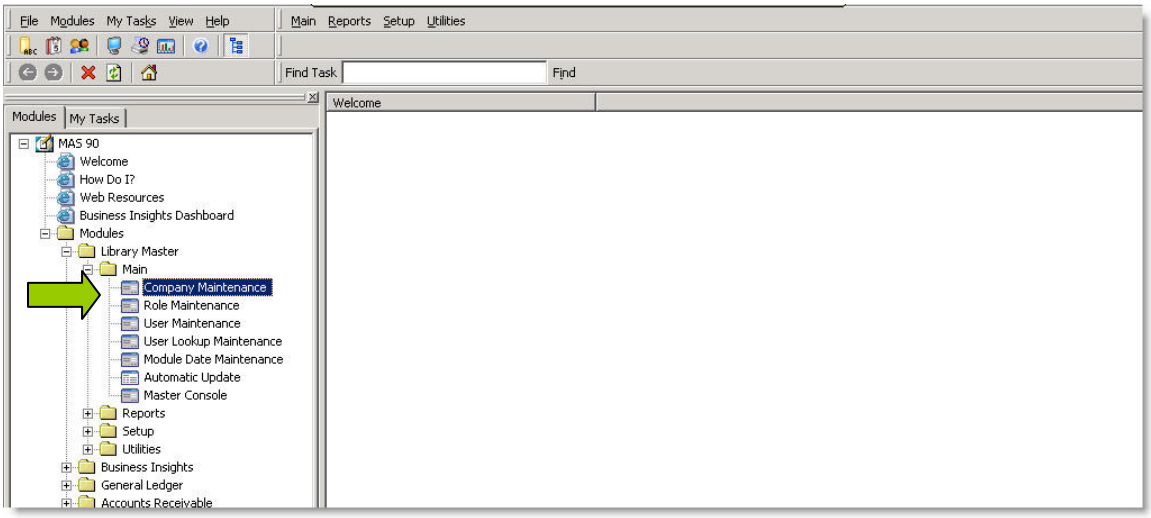
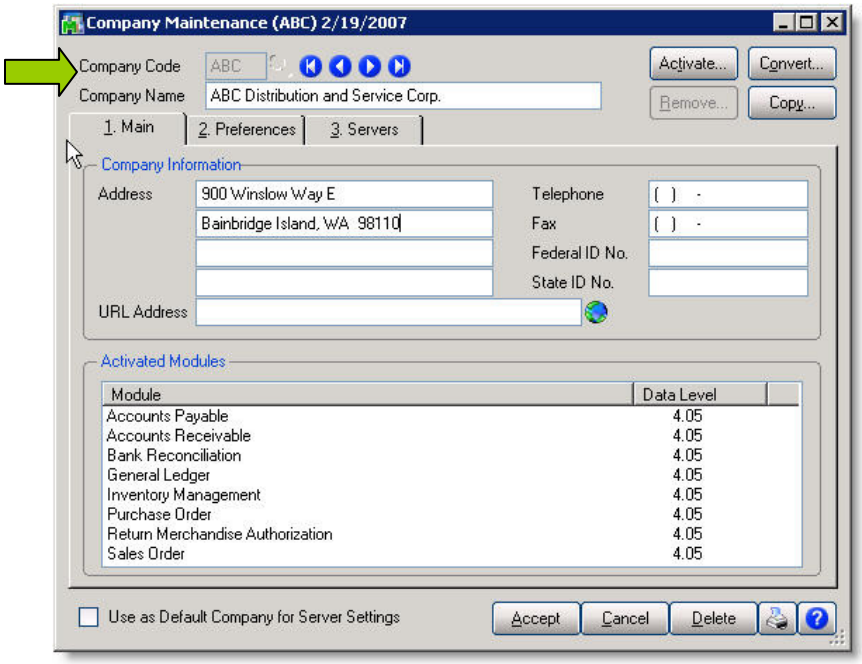
MAS 90/200

Avalara's standard integration for the MAS 90 and MAS 200 ERP application utilizes the MAS Company Code as the AvaTax Company Code cross-reference. To locate the code, open the MAS application, select the Library Master module, Main folder, and the Company Maintenance option.



The Company Maintenance window is displayed. On the top left corner of the window, the MAS Company Code is found. This is the Company Code utilized by the AvaTax service.



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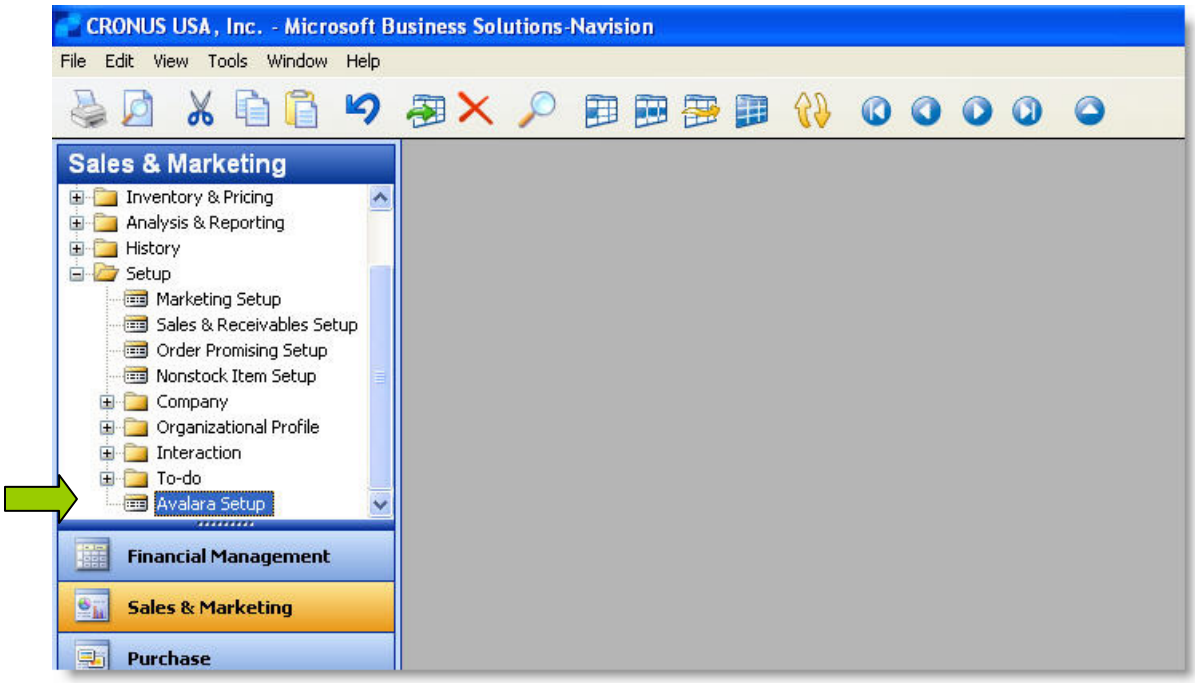
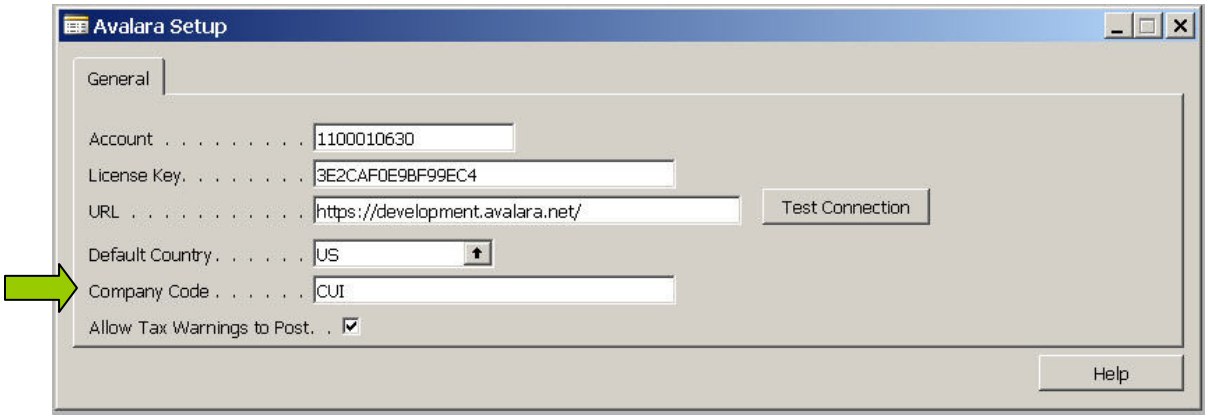
Navision

Avalara's standard integration for the Navision ERP application creates a field within a custom AvaTax window to designate a Company Code. The AvaTax for Navision product must first be installed to complete Company Code definition. To access the menu option, open the Navision application, select the Sales & Marketing menu, select the Setup folder, and the Avalara Setup option.



The Avalara Setup window is displayed. The last field on the window is designated Company Code, and this is the field where the desired user-defined Company Code is recorded. Generally, a three (3) to five (5) character Company Code is suggested.



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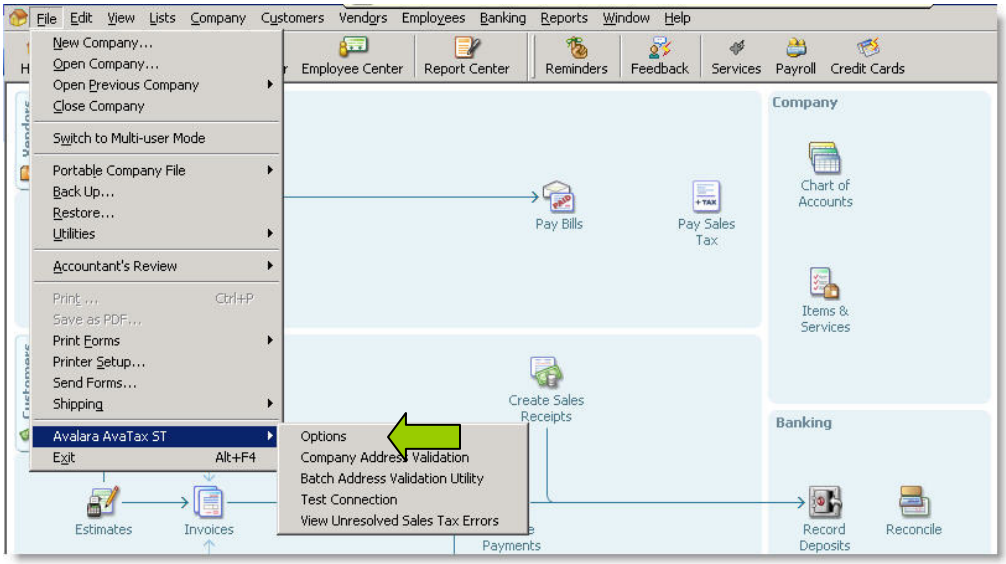
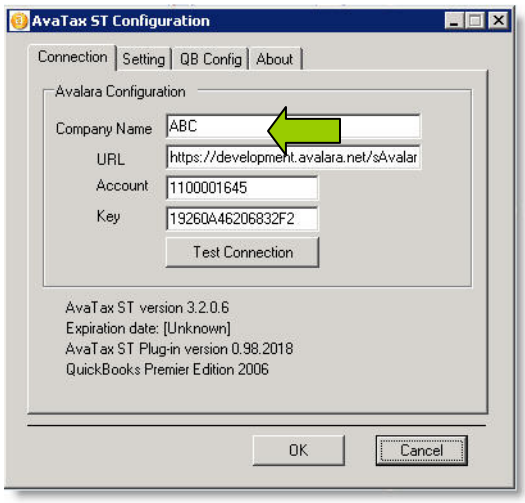
QuickBooks

Avalara's standard integration for the QuickBooks ERP application creates a field within a custom AvaTax window to designate a Company Code. The AvaTax for QuickBooks installer must first be executed to complete Company Code definition. To access the menu option, open the QuickBooks application, select the File drop down menu, Avalara AvaTax ST menu, and the Options selection.



The AvaTax ST Configuration window is displayed. The first field on the window is designated Company Name, and this is the field where the desired user-defined Company Code is recorded. Generally, a three (3) to five (5) character Company Code is suggested.



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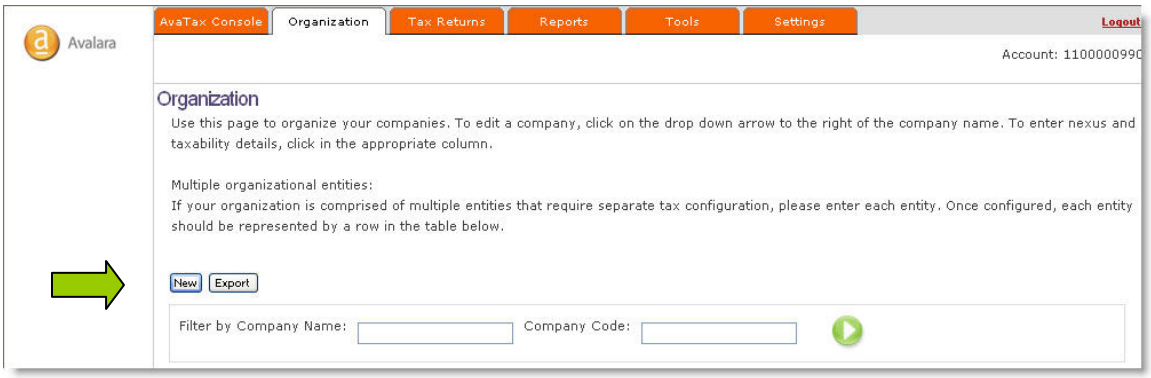
Software Development Kit (SDK)

If your organization is utilizing Avalara's SDK to create a custom integration for the ERP/eCommerce application, the Company Code will be defined by your organization's development team. The Company Code is a required element to be passed with the transaction set when requesting a sales tax calculation from the AvaTax service.

Company Definition

To define a company or set of companies for your organization on the AvaTax Dashboard, log in to the dashboard utilizing the set up credentials provided during the download of the AvaTax Product from the Avalara User Center. On the Organization tab of the Dashboard, the organization chart is displayed. To create a company entry on the chart, select the New button on the top left section of the page.



A web page is called that has a series of fields requesting information to complete the Company definition within the AvaTax Dashboard.

Field	Required?	Information
Company Code	Yes	Utilize Company Code as identified above
Company Name	Yes	User-defined for reference on the organization chart
Select Parent Company	No	Only required for Child company set-up
Separate Reporting	Yes	Combine parent & child reporting?
Business TIN	No	For future use
Company Status	Yes	Set as Active to utilize company
Tax Profile	Yes	Only required for Child company set-up
Set Default Company	Yes	1 company required to be Default
Address/Contact	No	For future use

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Nexus Selection

Introduction

After your organization creates the appropriate company records in the chart on the Organization tab of the AvaTax Dashboard, it is necessary to define where and when AvaTax should return sales tax calculations. This process is known as defining Nexus for your company.

Nexus is a legal term meaning that a seller by virtue of their business activities has a "connection" with a state and/or local taxing jurisdiction as to be required to collect tax. In order for a seller to have nexus, they must have a "substantial physical presence" in a taxing jurisdiction.

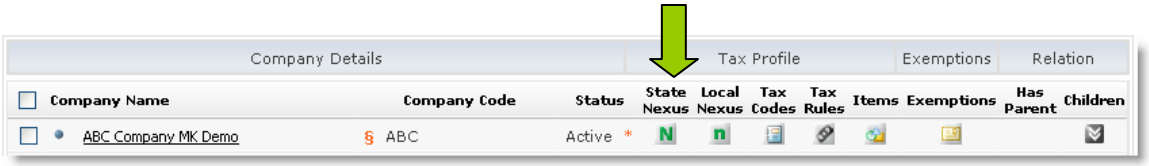
Elements that can be construed as a substantial physical presence are:

- An organization's corporate office
- Remote sales office
- Remote employee, e.g. a sales person working from their home, payroll
- Warehouse space, whether owned or rented, containing owned inventory
- Delivery of product by means of a company owned vehicle or truck
- Owned inventory leased to a customer

The AvaTax Organization tab requires State Nexus to be defined, and for some U.S. states and territories, a subsequent designation of Local Nexus must also be defined. Review your organization's list of U.S. states and territories where there is an element of Nexus and identify all states in which your organization is currently registered to collect sales tax. The Nexus Identification worksheet is included in the Pro document package, and is intended to assist in identifying potential Nexus qualifications for your organization. Utilize this list to complete the following State and Local Nexus sections.

State Nexus

On the Organization tab of the AvaTax Dashboard, the column heading of Tax Profile displays an orange button under the State Nexus heading.



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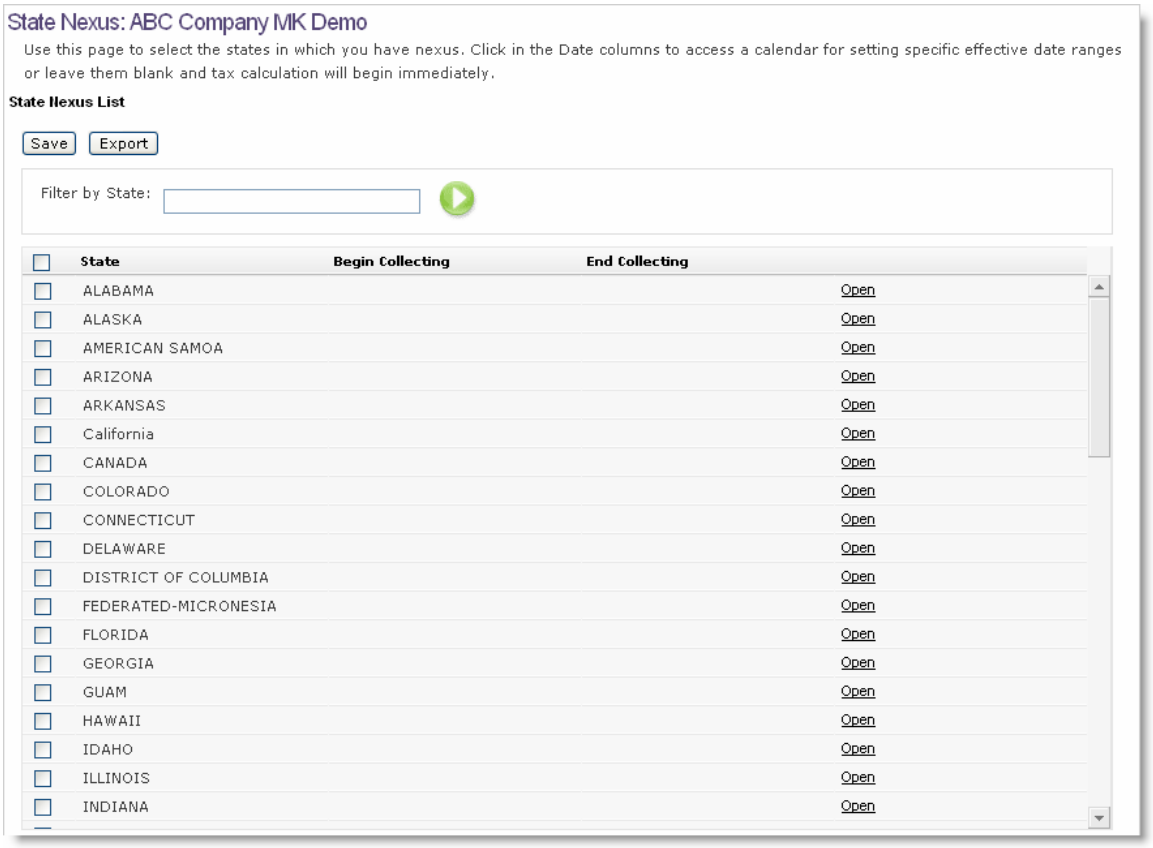
Press the orange State Nexus button to begin the selection process.

The next screen displayed is a matrix including all U.S. States, Territories, and Provinces where AvaTax can generate sales tax calculations. To select a state as a Nexus state, e.g. one that will receive a sales tax calculation from AvaTax, merely click on the check box to the left of the state name.



Upon completing the selection of the states via check box, press the Save button at the top of the browser window.

The Begin Collecting and End Collecting date fields, if left blank, will have default information recorded as follows:

- Begin Collecting – Current date is decremented by 1 year
  - If the current date is 3/1/2007, when Nexus is selected, the Begin Collecting date will default to 3/1/2006
- End Collection – 12/31/2099

Either set of dates can be defined by your organization either during the Nexus selection process or subsequent to the selection. These dates are utilized to

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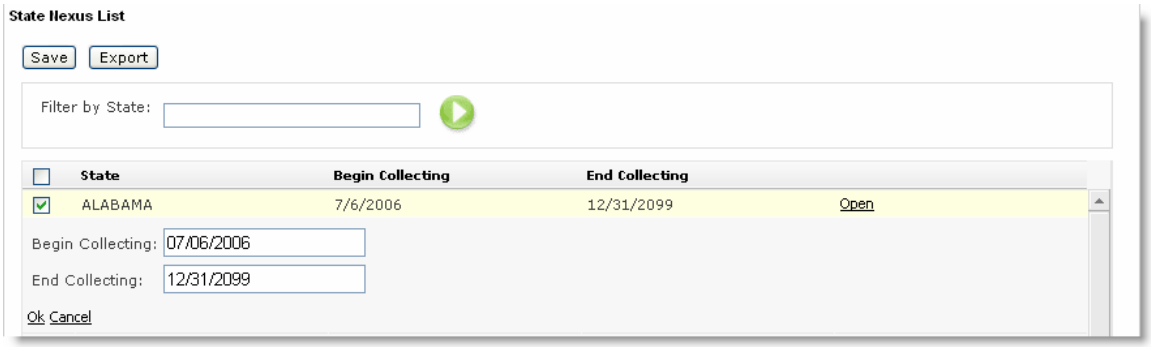
compare with document dates identified on transactions sent to AvaTax for a sales tax calculation. Any document dates prior to the Begin Collecting date or after the End Collecting date will receive a 0.0% sales tax calculation.

To edit the Begin Collecting or End Collecting dates, select the Open link associated with the state in question.

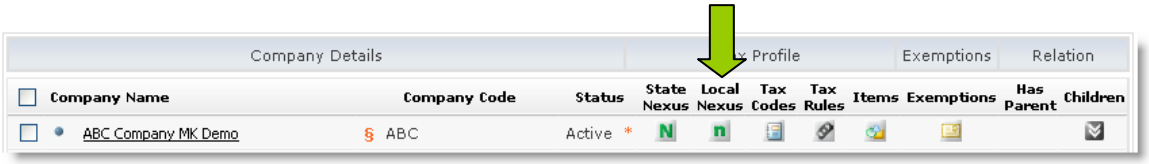


Alter the date as desired, select the Ok link, collapsing the edit window, and press the Save button.

Local Nexus

A majority of the U.S. states do not require further definition of Local Nexus after having been selected during the State Nexus process. For example, once the state of Ohio is selected as a Nexus State all local city, county, and special taxing jurisdictions are automatically included for your organization. There are a small group of states that require further Nexus definition at the local level.

Upon completion of the State Nexus definition, select the orange Local Nexus button under the Tax Profile heading.



The screen displayed provides access to Local Nexus selection, and is called on a state-by-state basis. From the *Filter by State* drop down selection box, all states and territories requiring additional Local Nexus definition are dynamically included in the list. This list is built based upon Nexus States selected in the process noted above AND require further Local Nexus definition.

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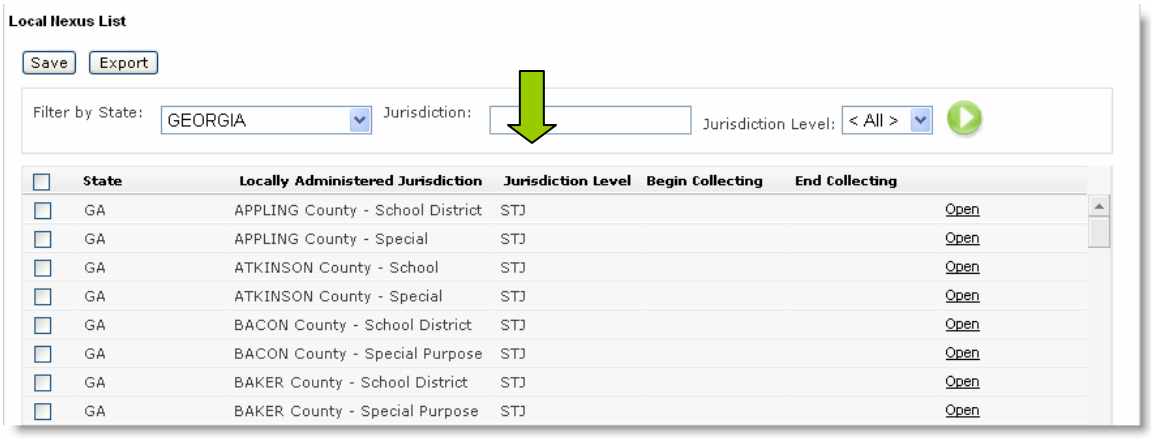
From the Filter by State drop down selection list, identify the state to review Local Nexus options, and press the Green Arrow on the right side of the page.

The Local Nexus matrix is similar in format to the State Nexus displayed above. The selection process is the same utilizing the check boxes, Begin Collecting date, and End Collecting date.

An additional column is included to identify the jurisdiction level associated with a particular entry:

- County jurisdiction
- City jurisdiction
- Special Taxing jurisdiction (STJ)



Most of the States included in the Local Nexus selection process have Special Taxing Jurisdictions (STJ) that are optional dependent on having Nexus or a *physical presence* within the jurisdiction.

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Six (6) states in the U.S. are known as Home Rule or Self-Administered states:

- Alabama
- Alaska
- Arizona
- Colorado
- Idaho
- Louisiana

In Home Rule states the local taxing jurisdictions are administered either at the local level or through regional taxing authorities. For example, the Alabama sales tax return primarily reports only tax collected for the state imposed sales tax. Accordingly, adding the City or County taxing jurisdiction for one of the above states increases the number of sales tax returns required to file for those states.

NOTE: Once your organization registers to collect sales tax in a city, county, or state taxing jurisdiction, sales tax returns must continue to be filed regardless of an absence of sales activity or sales tax liability.

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Tax Code Selection

Introduction

Avalara provides access to tax rules to be applied to items (e.g. SKU's) utilized by your organization for sales and billing transactions by identifying AvaTax System Tax Codes that represent the products or services provided to your customer base. There are approximately 1,000 System Tax Codes available to select and subsequently map to your organization's item or SKU record. Each of the System Tax Codes has tax rules for each taxing jurisdiction in the United States and Canada. The tax rules identify if the product or service associated with the System Tax Code is either:

- 100% taxable
- Exempt from sales tax
- Partially taxable – *for example, in California certain categories of software maintenance are subject to a tax rule only applying the applicable sales tax rate to 50% of the sale amount*
- Subject to a rate override – *for example, in Chicago lease charges for tangible personal property are subject to a 6.0% sales tax rate in lieu of the standard 1.0% rate*
- Subject to caps or thresholds – *for example, in Massachusetts certain types of apparel have tax exemptions up to a sale price of $175.00*

This section of the Set-Up Guide provides assistance in locating the appropriate System Tax Code for each product or service offered to your organization's customer base, and subsequently mapping that Tax Code to the item code.

AvaTax System Tax Code List

Included in the packet providing this Set-Up Guide is an Excel worksheet that lists all available AvaTax System Tax Codes. The file is identified as *AvaTax System Tax Codes.xls*. Utilize this listing of tax codes to select codes that correspond to groups of products and/or services that your organization offers for sale to your customer base.

The AvaTax system tax code is an eight (8) character code generally comprised of a two (2) character alpha element and a six (6) character numeric element. For example:

- PC070300 – Computer Hardware (Business to Business) – Monitor
- SW050400 – Website - Hosting

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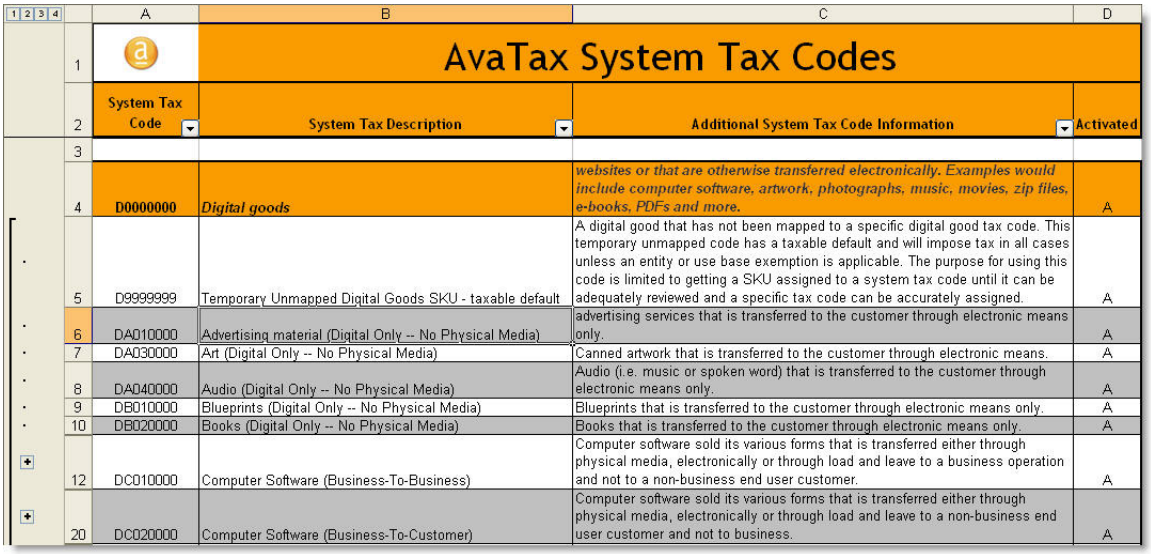
The Excel worksheet is folded to identify top level Parent Tax Code categories, and makes available expansion points (+) along the left side of the document to reveal the underlying system tax codes.

Avalara identifies five (5) primary groupings of tax codes:

- Digital – Products that are delivered electronically, e.g. downloaded from a web site or delivered via email
  - Digital tax codes begin with the letter "D"
- Freight – Charges for delivery, shipping, or handling
  - Freight tax codes begin with the letter "F"
- Other – Miscellaneous charges, e.g. dues, adjustments, royalties
  - Other tax codes begin with the letter "O"
- Tangible personal property (TPP) – Products other than real property
  - TPP tax codes begin with the letter "P"
- Services – Services offered for sale by your organization, e.g. repairs, installation, consulting, etc.
  - Service tax codes begin with the letter "S"

The AvaTax System Tax Code worksheet is formatted as follows:

- Column A – System Tax Code
- Column B – System Tax Description
- Column C – Additional System Tax Code Information
- Column D – Activation Indicator



	A	B	C	D
1		AvaTax System Tax Codes		
2	System Tax Code	System Tax Description	Additional System Tax Code Information	Activated
3				
4	D0000000	*Digital goods*	*websites or that are otherwise transferred electronically. Examples would include computer software, artwork, photographs, music, movies, zip files, e-books, PDFs and more.*	A
5	D9999999	Temporary Unmapped Digital Goods SKU - taxable default	A digital good that has not been mapped to a specific digital good tax code. This temporary unmapped code has a taxable default and will impose tax in all cases unless an entity or use base exemption is applicable. The purpose for using this code is limited to getting a SKU assigned to a system tax code until it can be adequately reviewed and a specific tax code can be accurately assigned.	A
6	DA010000	Advertising material (Digital Only -- No Physical Media)	advertising services that is transferred to the customer through electronic means only.	A
7	DA030000	Art (Digital Only -- No Physical Media)	Canned artwork that is transferred to the customer through electronic means.	A
8	DA040000	Audio (Digital Only -- No Physical Media)	Audio (i.e. music or spoken word) that is transferred to the customer through electronic means only.	A
9	DB010000	Blueprints (Digital Only -- No Physical Media)	Blueprints that is transferred to the customer through electronic means only.	A
10	DB020000	Books (Digital Only -- No Physical Media)	Books that is transferred to the customer through electronic means only.	A
12	DC010000	Computer Software (Business-To-Business)	Computer software sold its various forms that is transferred either through physical media, electronically or through load and leave to a business operation and not to a non-business end user customer.	A
20	DC020000	Computer Software (Business-To-Customer)	Computer software sold its various forms that is transferred either through physical media, electronically or through load and leave to a non-business end user customer and not to business.	A

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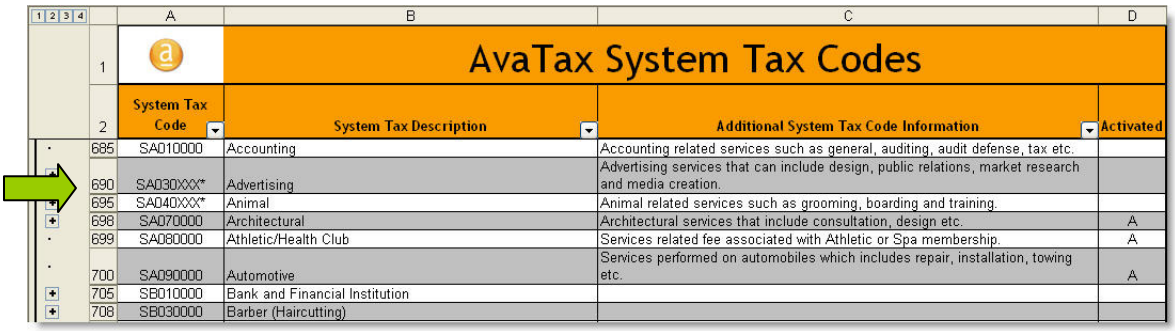
As indicated above, the worksheet is delivered in a collapsed format only displaying the top level System Tax Codes for a unique category of product or service. A majority of the top level System Tax Codes contain further definitions refining the type of product or service serviced by the associated tax rules.

As an example, top level System Tax Code DC010000 represents the category of Computer Software (Business to Business). Included in this category of product is further definition of the software broken down by whether it is prewritten (canned) code or custom code. These two categories are then each broken down by the method of delivering the software: physical media, electronic delivery, or load & leave. In total, the DC010000 category of tax codes includes six System Tax Codes that each have a unique set of tax rules identifying taxability of the product for all taxing jurisdictions in the United States and Canada:

System Tax Code	System Tax Description
DC010100	Software (B2B)-custom-delivered via physical media
DC010200	Software (B2B)-custom-delivered electronically
DC010300	Software (B2B)-custom-delivered via load & leave
DC010400	Software (B2B)-canned-delivered via physical media
DC010500	Software (B2B)-canned-delivered electronically
DC010600	Software (B2B)-canned-delivered via load & leave

To navigate the list of AvaTax System Tax Codes, first identify the top level Tax Code, and determine if there are further refined variations of that Tax Code available for selection. To demonstrate, if the service related Tax Code required for your organization is Advertising, the top level code is identified in the SA030XXX series.



	A	B	C	D
1		AvaTax System Tax Codes		
2	System Tax Code	System Tax Description	Additional System Tax Code Information	Activated
685	SA010000	Accounting	Accounting related services such as general, auditing, audit defense, tax etc.	
690	SA030XXX*	Advertising	Advertising services that can include design, public relations, market research and media creation.	
695	SA040XXX*	Animal	Animal related services such as grooming, boarding and training.	
698	SA070000	Architectural	Architectural services that include consultation, design etc.	A
699	SA080000	Athletic/Health Club	Services related fee associated with Athletic or Spa membership.	A
700	SA090000	Automotive	Services performed on automobiles which includes repair, installation, towing etc.	A
705	SB010000	Bank and Financial Institution		
708	SB030000	Barber (Haircutting)		

When a top level AvaTax System Tax Code has additional Tax Codes available, there will be an expansion point identified by a + character BELOW (and to the left of) the top level Tax Code. In the example referring to the Advertising Tax Code, there are multiple Advertising Tax Codes to select from based upon the +

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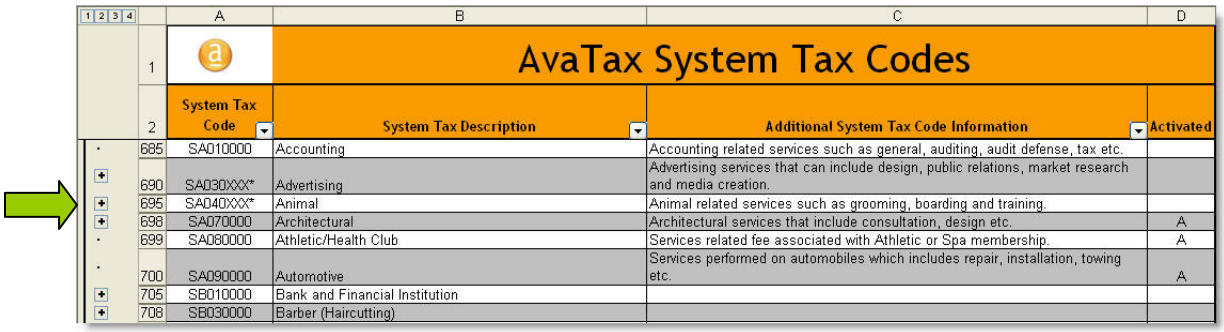
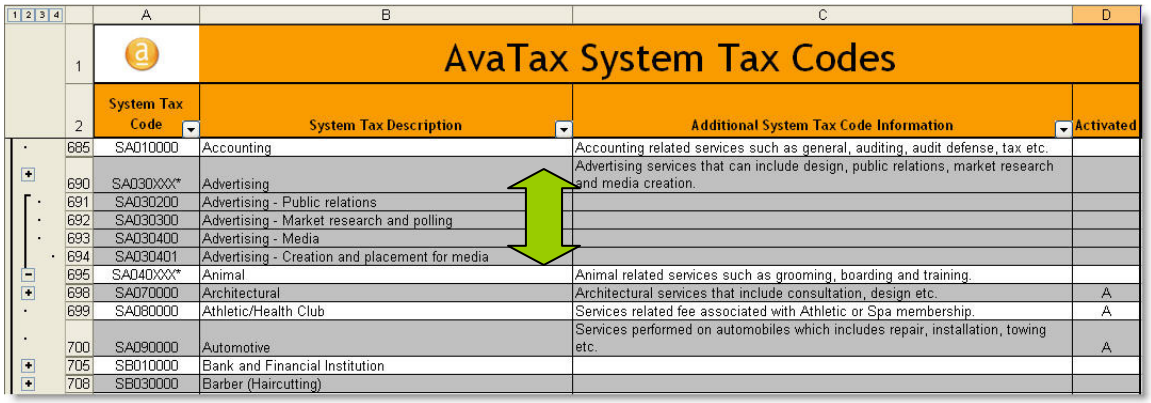
character appearing to the left of the Animal Tax Code BELOW the Advertising Tax Code.



	A	B	C	D
1	AvaTax System Tax Codes			
2	System Tax Code	System Tax Description	Additional System Tax Code Information	Activated
685	SA010000	Accounting	Accounting related services such as general, auditing, audit defense, tax etc.	
690	SA030XXX*	Advertising	Advertising services that can include design, public relations, market research and media creation.	
695	SA040XXX*	Animal	Animal related services such as grooming, boarding and training.	
698	SA070000	Architectural	Architectural services that include consultation, design etc.	A
699	SA080000	Athletic/Health Club	Services related fee associated with Athletic or Spa membership.	A
700	SA090000	Automotive	Services performed on automobiles which includes repair, installation, towing etc.	A
705	SB010000	Bank and Financial Institution		
708	SB030000	Barber (Haircutting)		

Upon clicking the + expansion point below the Advertising Tax Code (actually next to the Animal Tax Code line), all associated Advertising Tax Codes are displayed.



	A	B	C	D
1	AvaTax System Tax Codes			
2	System Tax Code	System Tax Description	Additional System Tax Code Information	Activated
685	SA010000	Accounting	Accounting related services such as general, auditing, audit defense, tax etc.	
690	SA030XXX*	Advertising	Advertising services that can include design, public relations, market research and media creation.	
691	SA030200	Advertising - Public relations		
692	SA030300	Advertising - Market research and polling		
693	SA030400	Advertising - Media		
694	SA030401	Advertising - Creation and placement for media		
695	SA040XXX*	Animal	Animal related services such as grooming, boarding and training.	
698	SA070000	Architectural	Architectural services that include consultation, design etc.	A
699	SA080000	Athletic/Health Club	Services related fee associated with Athletic or Spa membership.	A
700	SA090000	Automotive	Services performed on automobiles which includes repair, installation, towing etc.	A
705	SB010000	Bank and Financial Institution		
708	SB030000	Barber (Haircutting)		

For Advertising services, Avalara provides tax codes for the following specific service offerings:

System Tax Code	System Tax Description
SA030200	Advertising – Public relations
SA030300	Advertising – Market research and polling
SA030400	Advertising – Media
SA030401	Advertising – Creation and placement for media

AvaTax System Tax Codes identified in the format, SA030XXX, flagged with an asterisk (*) are top level Tax Codes that do NOT have tax rules associated with them, and are merely place holders for a category of products or services.

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AvaTax System Tax Code Selection

The suggested tax code selection process includes a review of your organization's product and service offering, and the identification of the primary categories included in this offering to your organization's customer base. In addition, items included on sales orders, invoices, returns, etc. that represent charges for freight, handling, or other miscellaneous categories must be identified as well.

Based upon the categories of products, services, and other charges identified for your organization, review the AvaTax System Tax Code worksheet to capture the correct System Tax Code that corresponds to these various categories. Keep in mind that many of the AvaTax Tax Codes are defined to identify very specific variations of products or services. As noted above, there are six (6) categories of software tax codes, sold in a business-to-business environment, that can potentially apply to your organization's sale of computer software. In addition, there is a separate set of AvaTax Tax Codes that apply to software products sold in a business-to-customer environment.

In order to effectively utilize the *Find (Ctrl+F)* function in the Excel worksheet, insure that all expansion points within the document are extended (e.g. showing all - at the various levels of grouping). The Find function does not actively open Excel rows contained within a collapsed grouping.

Once the needed AvaTax System Tax Codes are identified, review the Activated column (column D on the worksheet). If an "A" is found associated with the selected System Tax Codes, this indicates that the System Tax Rules associated with the Tax Code are active and available for your organization's immediate use.

In the event of the selection of a System Tax Code that is not currently in an Activated mode, please document the selection and forward to Avalara to begin the activation process. The process to complete the activation of the associated System Tax Rules requires approximately two weeks. Send an email identifying the selected AvaTax System Tax Codes to:

premiumservices@avalara.com

If there are any questions or requests for additional information in regard to this process, please contact Avalara Support. A support representative can be contacted via telephone at our toll free number 1.877.780.4848 – option 2 at the automated attendant. Standard support hours are from 6:00 a.m. through 5:00 p.m. Pacific Time, Monday through Friday.

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Tax Code Mapping

Introduction

Avalara offers two options, for *most* ERP and eCommerce applications, to link your organization's item codes to the AvaTax System Tax Codes. For all ERP and eCommerce applications, the Item Code to Tax Code mapping can be performed on the AvaTax Dashboard. The Dashboard option includes a manual update process included as part of the User Interface, and offers a mass upload utilizing an Excel worksheet.

A second mapping option is available on some ERP and eCommerce applications permitting the direct designation of the desired AvaTax System Tax code to the Item record maintained within your organization's ERP or eCommerce application.

Included below are ERP system specific options for the Item to Tax Code mapping process. The mapping options are identified for the following ERP applications:

- Acc Pac
- Dynamics GP – Great Plains
- MAS 90/200
- Navision
- QuickBooks – Premier, Pro, Enterprise
- Other – e.g. AvaTax integration utilizing Avalara's Software Development Kit (SDK)

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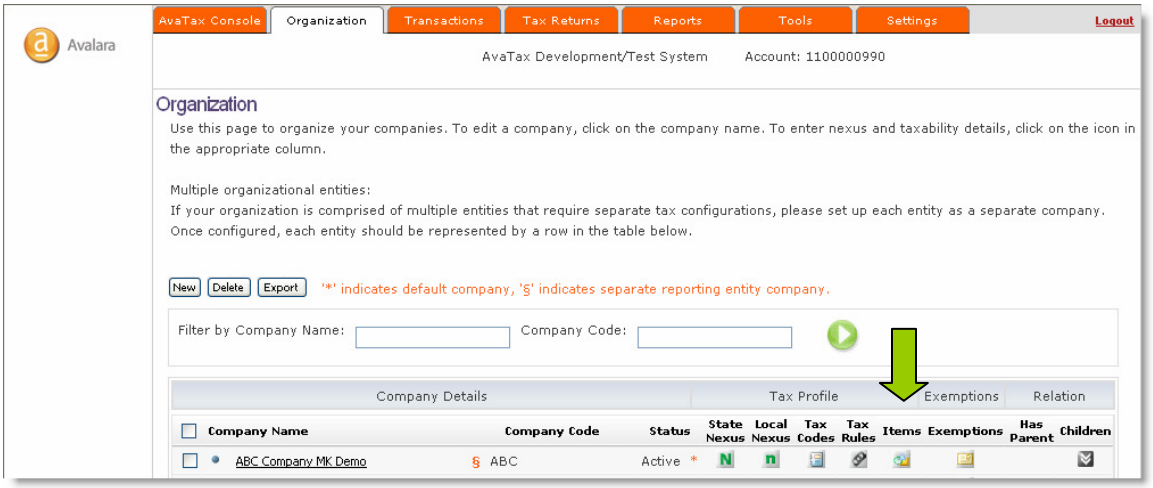
AvaTax System Tax Code Mapping

Acc Pac

Item to Tax Code mapping can be maintained on your organization's AvaTax Dashboard. On the Organization Tab of the AvaTax Dashboard, the Items button, under the Tax Profile column heading, provides access to the cross reference between Item Code and Tax Code.



There are two methods to create a cross reference between your organization's Item codes and the AvaTax System Tax Codes using the AvaTax Dashboard Items functionality. One method utilizes an Excel worksheet (.xls) or Comma Delimited File (.csv) to upload a large number of Item/Tax Code mappings, and the second method utilizes a User Interface directly on the Dashboard to enter the Item/Tax Code record.

To record a large number of Item/Tax Code mappings, the 4.12 Release of the AvaTax service adds Import functionality to the Tools tab of the AvaTax Dashboard. End user's may now import their Item to Tax Code mapping directly from the AvaTax Dashboard utilizing either a Comma Delimited file (.csv) or a standard Excel worksheet (.xls).

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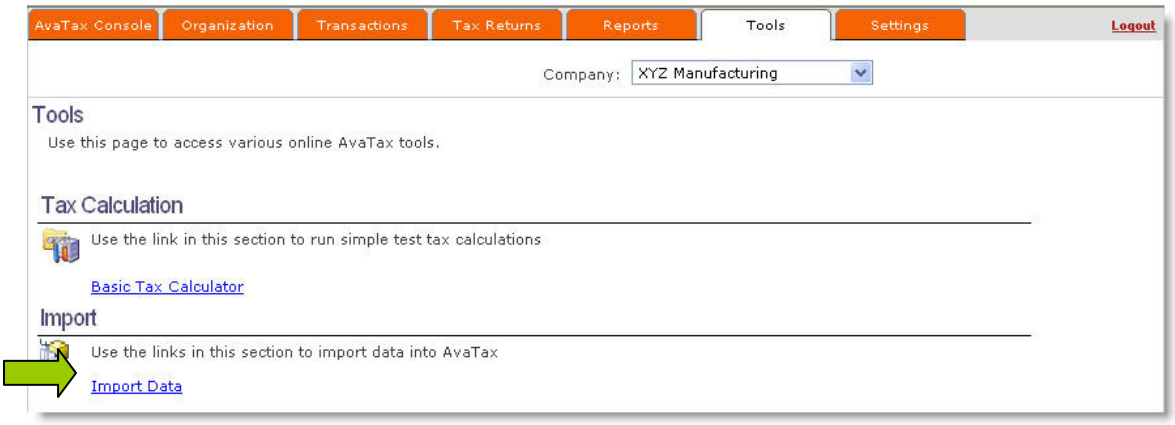
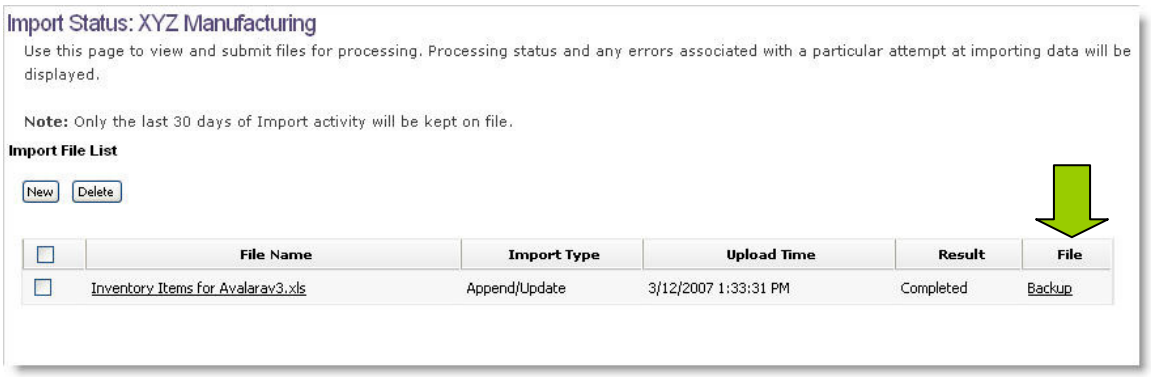
Selecting the Import Data hyper link provides access to the Import user interface.



The Import Status screen is displayed providing access to the Import File List of previous Import activity.



The Import File List identifies all file imports attempted over the course of the previous 30 days. Each successful file import creates a Comma Delimited (.csv) Backup file of the Item to Tax Code mapping prior to the successful import of the current Item mapping. Any historical Import files can be deleted from the Import File List by selecting the check box to the left of the File Name, and pressing the Delete button at the top of the list.

The Backup hyper link provides access to a downloadable file that can be imported to revert to the previous Item mapping. By clicking on the Backup hyper link, the following dialog window is displayed:

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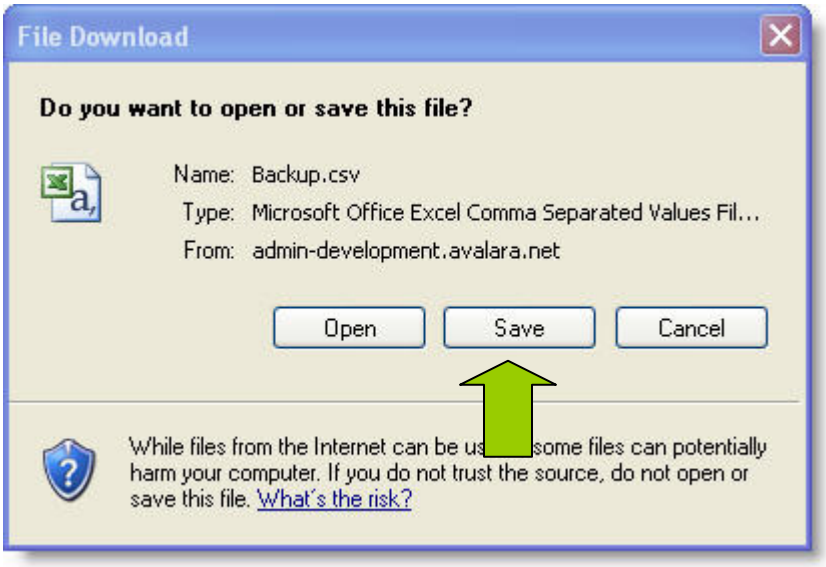

Select the Save option, and store the file locally. The process to import both new and Backup files is reviewed below.

To begin the Import process, select the New button on the top left of the Import Status screen.

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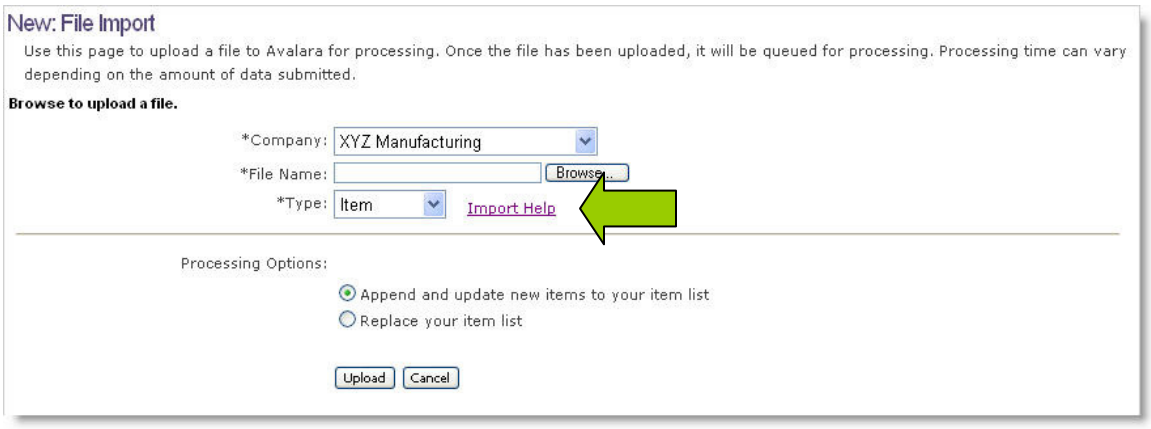
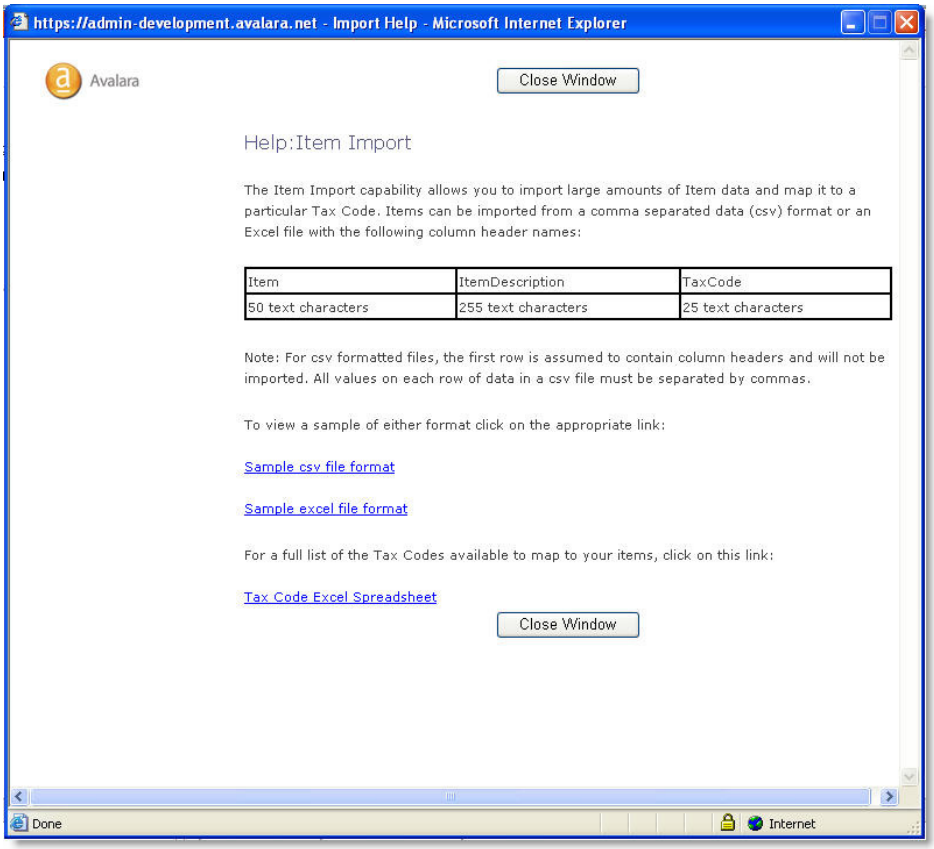
The File Import screen is displayed identifying the selection of import parameters required to begin the import process.



The Import functionality utilizes either a Comma Delimited (.csv) or Excel worksheet (.xls) file to facilitate the import of Item to Tax Code mapping. By selecting the Import Help hyper link found below the File Name Browse button, the following dialog window is displayed:



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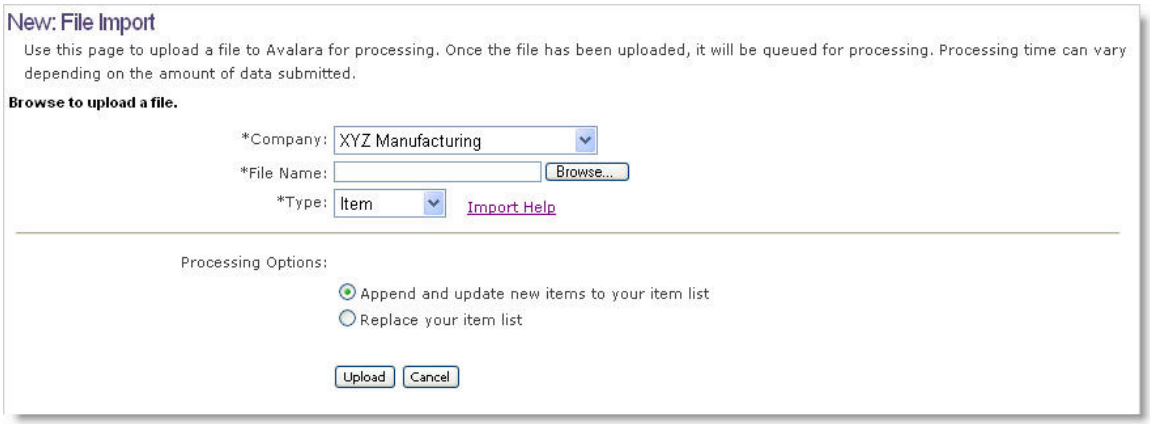
When utilizing either the Comma Delimited or standard Excel worksheet to import the Item mapping, row 1 of the file must contain the following column headings:

- Column A – Item
- Column B – ItemDescription
- Column C – TaxCode

Sample file formats can be downloaded from the Sample csv file format or the Sample excel file format hyper links on the Import Help dialog window. In addition, the Tax Code Excel Spreadsheet hyper link provides access to the AvaTax System Tax Code list.

	A	B	C
1		**AvaTax System Tax Codes**	
2		Note: AvaTax System Tax Codes do NOT provide taxability rules unless the AvaTax PRO product has been purchased.	
3	**System Tax Code**	**System Tax Description**	**Additional System Tax Code Information**
4			
5	**D0000000**	***Digital goods***	***Digital goods are generally viewed as downloadable items that are sold on websites or that are otherwise transferred electronically. Examples would include computer software, artwork, photographs, music, movies, zip files, e-books, PDFs and more.***
6	D9999999	Temporary Unmapped Digital Goods SKU - taxable default	A digital good that has not been mapped to a specific digital good tax code. This temporary unmapped code has a taxable default and will impose tax in all cases unless an entity or use base exemption is applicable. The purpose for using this code is limited to getting a SKU assigned to a system tax code until it can be adequately reviewed and a specific tax code can be accurately assigned.
7	DA010000	Advertising material (Digital Only -- No Physical Media)	Tangible personal property (i.e. designs, artwork, photos etc.) associated with advertising services that is transferred to the customer through electronic means only.
8	DA030000	Art (Digital Only -- No Physical Media)	Canned artwork that is transferred to the customer through electronic means.
9	DA040000	Audio (Digital Only -- No Physical Media)	Audio (i.e. music or spoken word) that is transferred to the customer through electronic means only.

Upon preparing the import file in either accepted format, return to the File Import screen:



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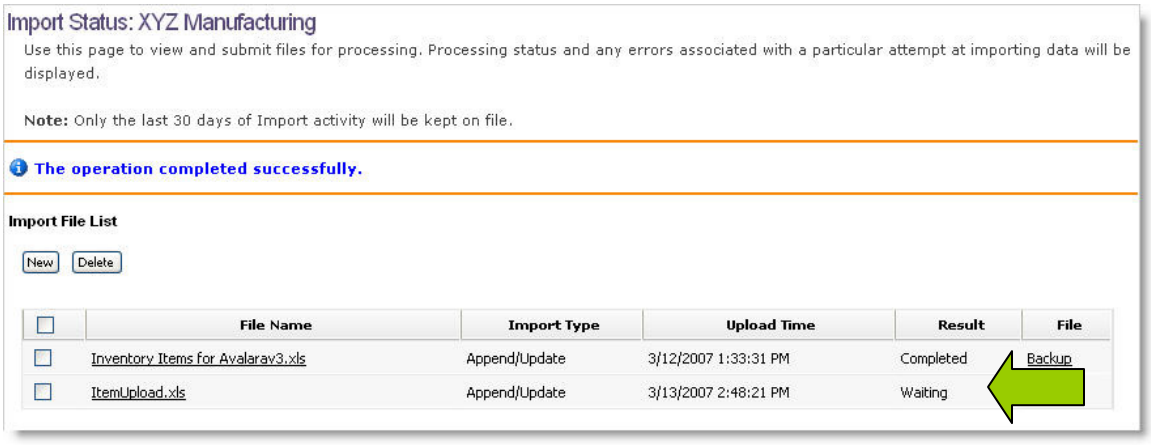
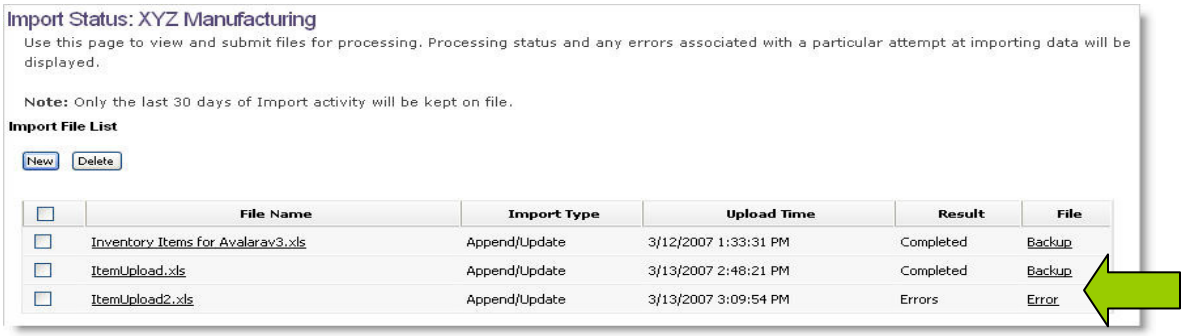
1. Select the desired Company from the Company drop down menu
2. Utilizing the Browse button, select the desired Import file
3. Identify the desired Processing Option:
    a. Append and update new items to your item list
    b. Replace your item list
4. Press the Upload button

The Import Status screen is returned, and the Item to Tax Code mapping worksheet is queued for processing. The initial Result returned is Waiting.



Upon successful completion of the import, the Result field updates to a status of Completed, and the File field is populated with a hyper link named Backup that provides access to a Comma Delimited file containing copy of the Item list contained in the AvaTax Dashboard prior to the import of the current Item update.

If an error is found in the Item import file, the entire import is aborted and a Result of Errors is displayed. The File field is populated with a hyper link named Error that provides access to an Excel worksheet identifying the specific



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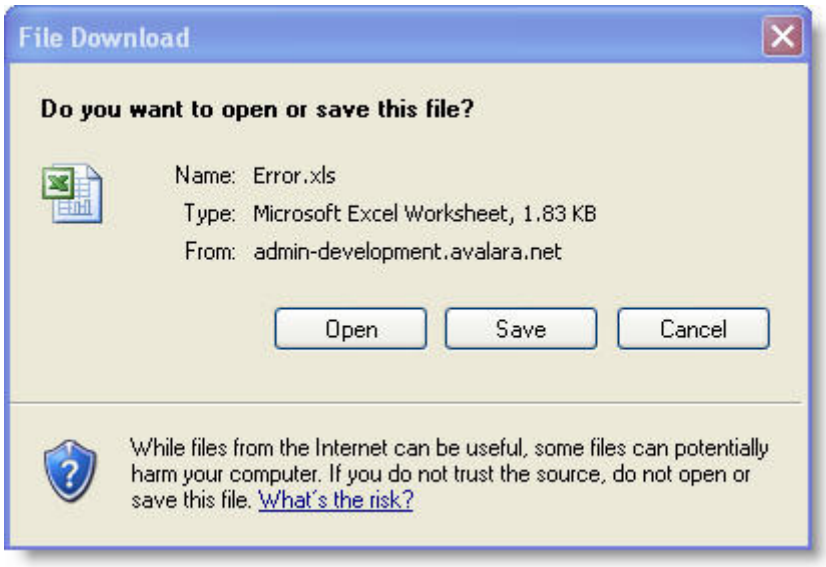
error(s) causing the import failure. Clicking on the Error hyper link calls the following dialog window:



Pressing the Open button displays the Excel worksheet identifying the lines causing the error.

	A	B	C	D
1	Item	ItemDescription	TaxCode	Errors
2		Application Software - delivered on CD	DC010400	ItemCode Missing --
3	SW-001-54351		DC010500	ItemDescription Missing --
4	HW-015-75001	7500 series Desktop Hardware - CPU		TaxCode Missing --
5				

Edit the original Item import file, repair the lines causing the error, and repeat the Import Process.

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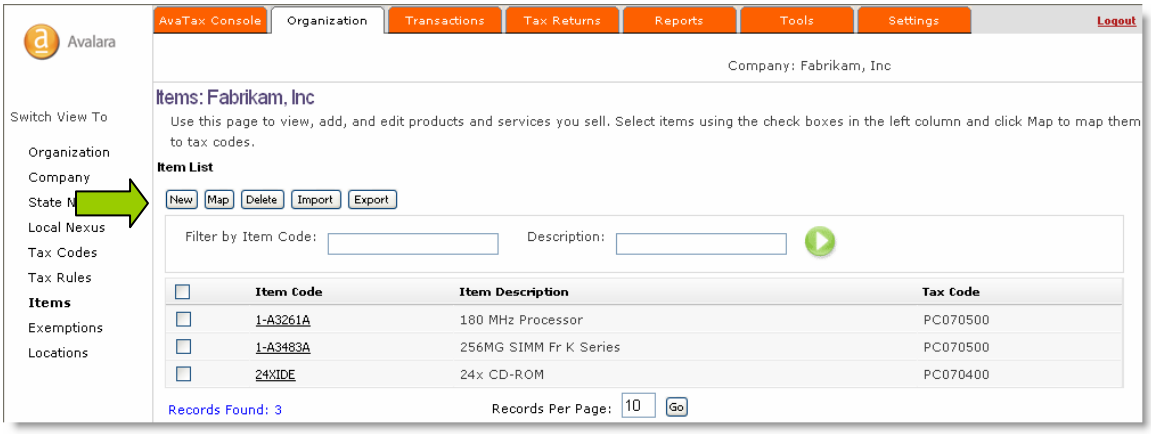
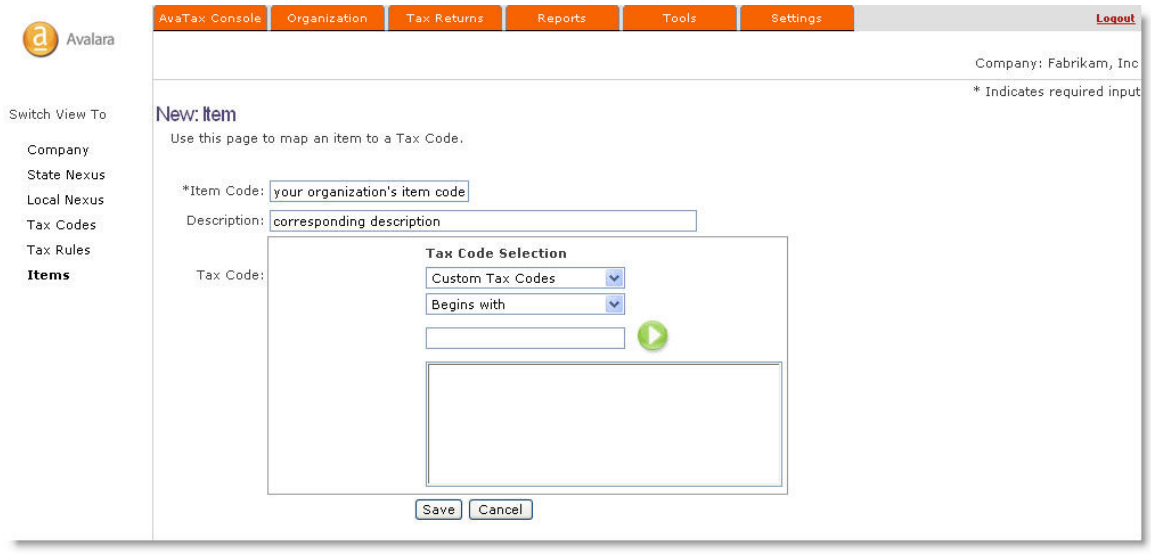
The AvaTax Dashboard provides a User Interface to manually add Item/Tax Code mappings or edit existing Item/Tax Code Mappings. After accessing the AvaTax Dashboard Items screen, a complete listing of the current Item mappings is displayed.



To manually add an Item Mapping record, press the New button. A separate screen is displayed provide the User Interface to add Item/Tax Code mappings.



On the Window identified as Tax Code:

1. Change the Tax Code Selection drop down list from Custom Tax Codes, TO *System Tax Codes*
2. Record the first characters of the AvaTax System Tax Code in the field below the *Begins with* drop down menu
3. Press the green refresh button

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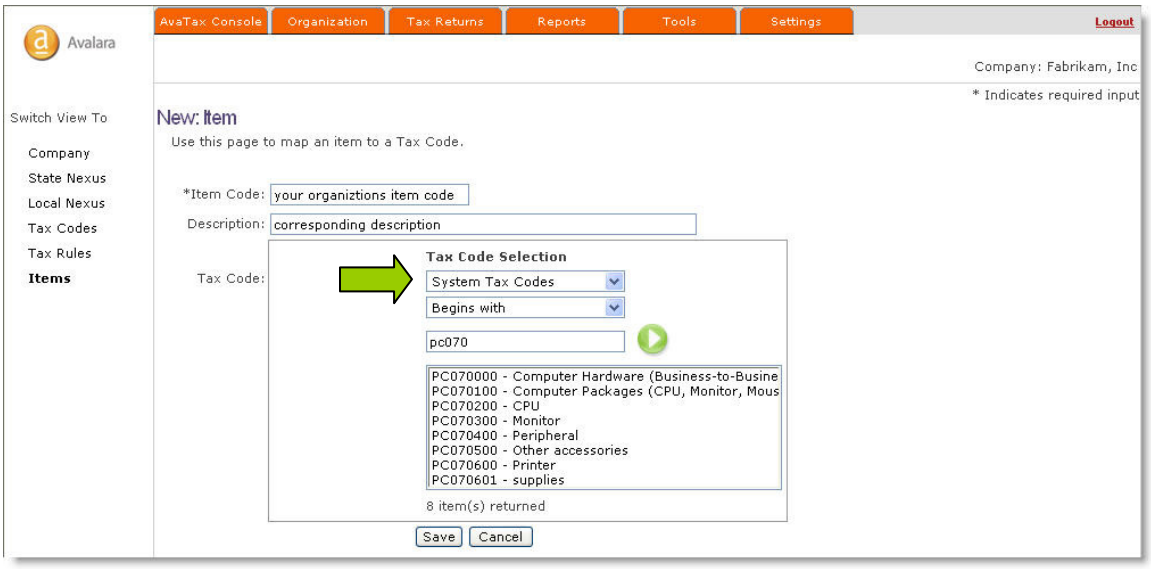
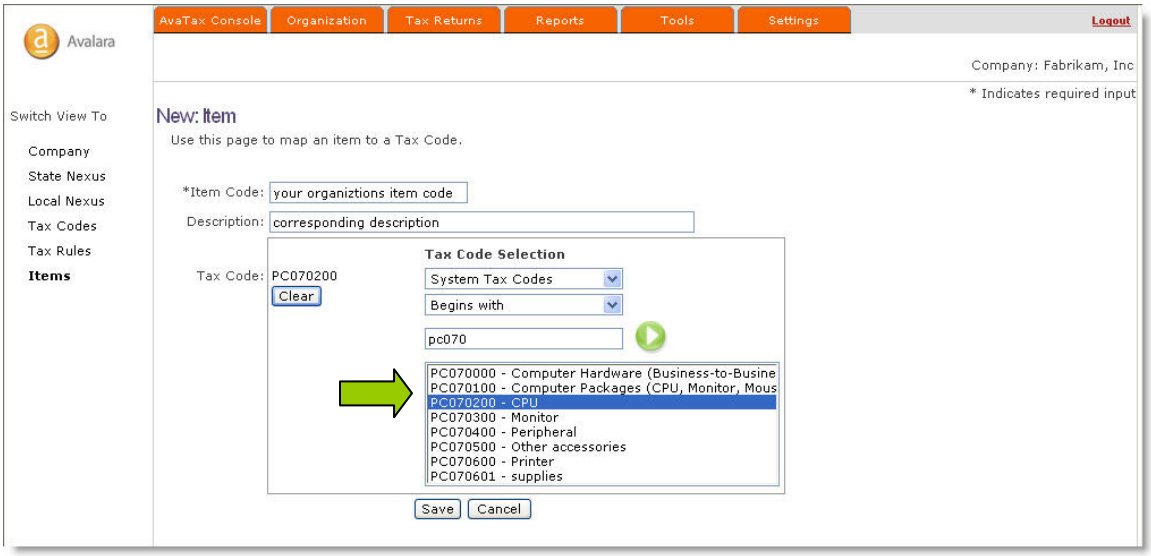
4. A list of corresponding AvaTax System Tax Codes is displayed in the window below



5. Click on the desired AvaTax Tax Code



6. Press the Save button

In order to edit an existing Item/Tax Code mapping, click on the Item Code displayed on the Items page, and make the required update utilizing the User Interface.

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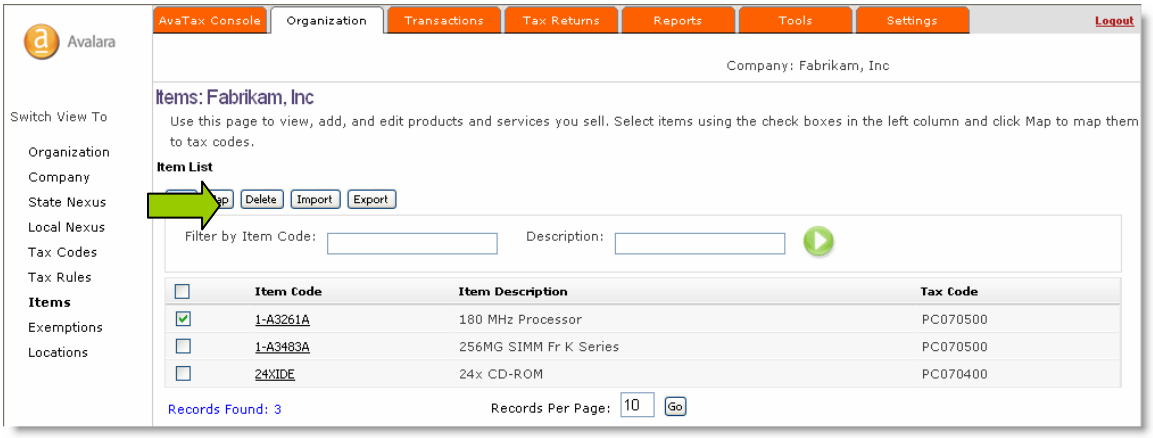
To delete an Item/Tax Code mapping, place a check in the Check Box to the left of the Item Code field, and press the Delete button displayed at the top of the screen.



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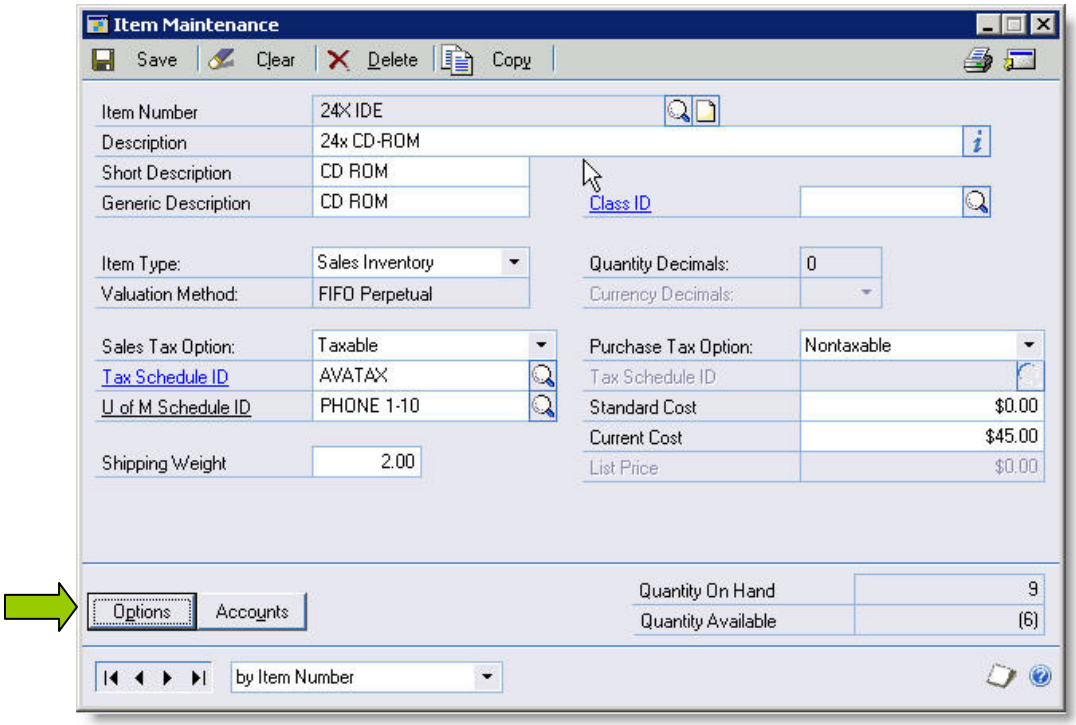
Dynamics GP – Great Plains

Option 1: The Item to Tax Code mapping can be facilitated directly on the Item Card within the Great Plains application. Access Item Maintenance within Great Plains, and press the Options button on the lower left corner of the Item Maintenance window.



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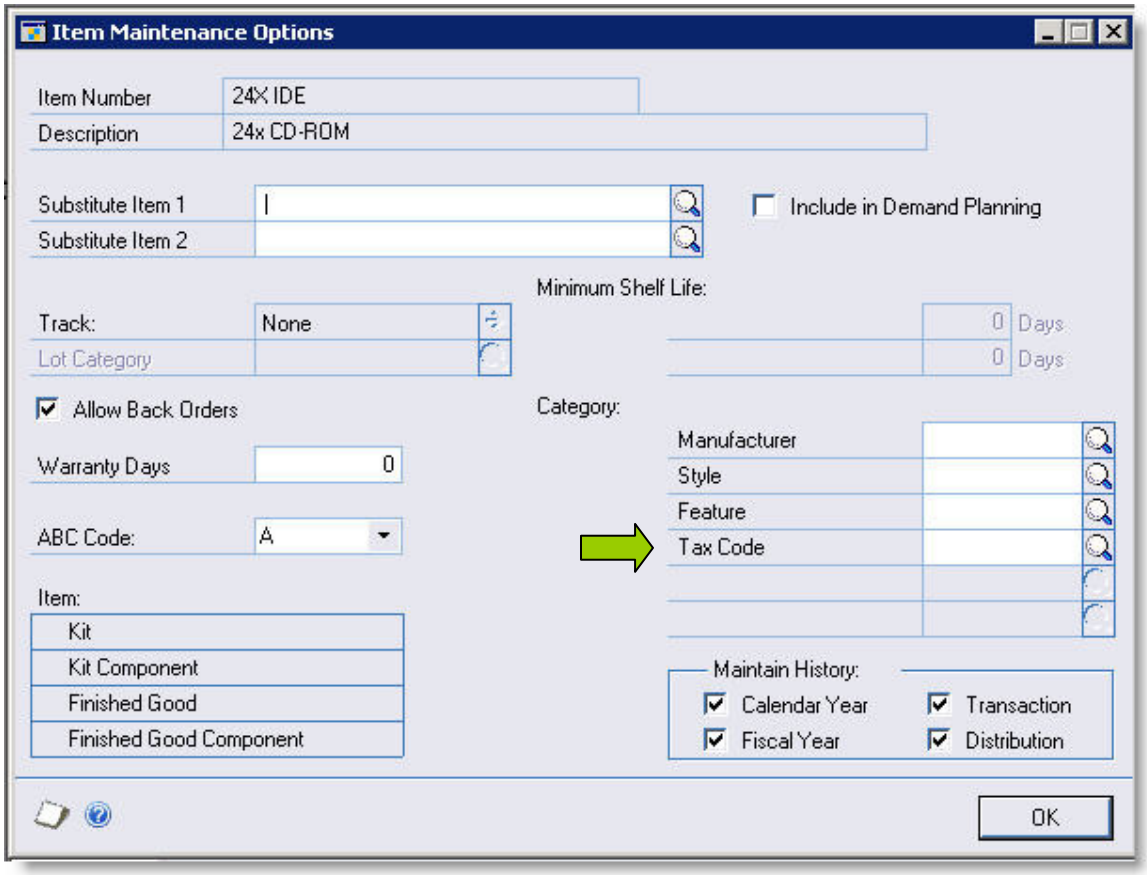
On the Item Maintenance Options window that is subsequently displayed, a series of (User) Categories is listed, including a *Tax Code* (or *Taxability* depending on the release of AvaTax that is installed in your organization's Great Plains application) field.



Record the eight (8) character AvaTax System Tax Code in the Tax Code (Taxability) field, and AvaTax will capture the Tax Code, passing it with other transaction information for a sales tax calculation.

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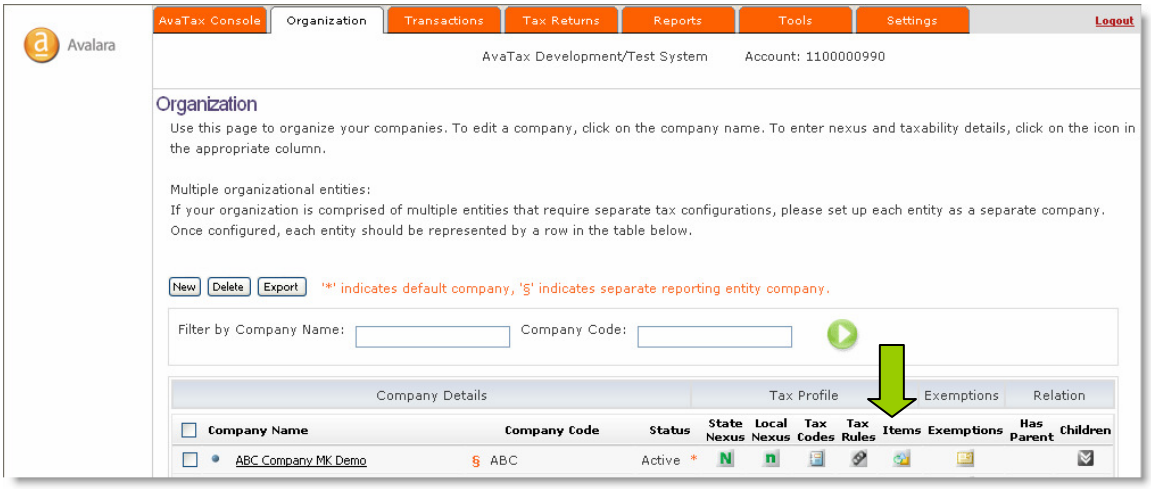
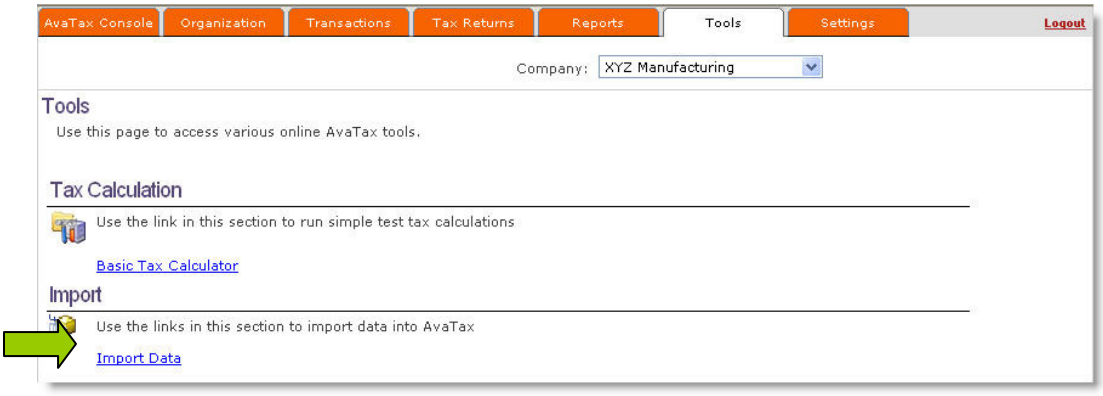
Option 2: Item to Tax Code mapping can be maintained on your organization's AvaTax Dashboard. On the Organization Tab of the AvaTax Dashboard, the Items button, under the Tax Profile column heading, provides access to the cross reference between Item Code and Tax Code.



There are two methods to create a cross reference between your organization's Item codes and the AvaTax System Tax Codes using the AvaTax Dashboard Items functionality. One method utilizes an Excel worksheet to upload a large number of Item/Tax Code mappings, and the second method utilizes a User Interface directly on the Dashboard to enter the Item/Tax Code record.

To record a large number of Item/Tax Code mappings, the 4.12 Release of the AvaTax service adds Import functionality to the Tools tab of the AvaTax Dashboard. End user's may now import their Item to Tax Code mapping directly from the AvaTax Dashboard utilizing either a Comma Delimited file (.csv) or a standard Excel worksheet (.xls).

Selecting the Import Data hyper link provides access to the Import user interface.



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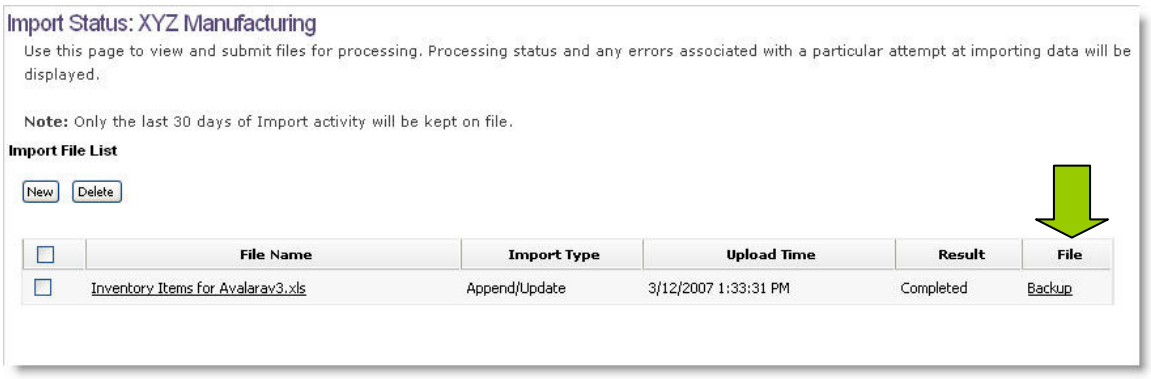
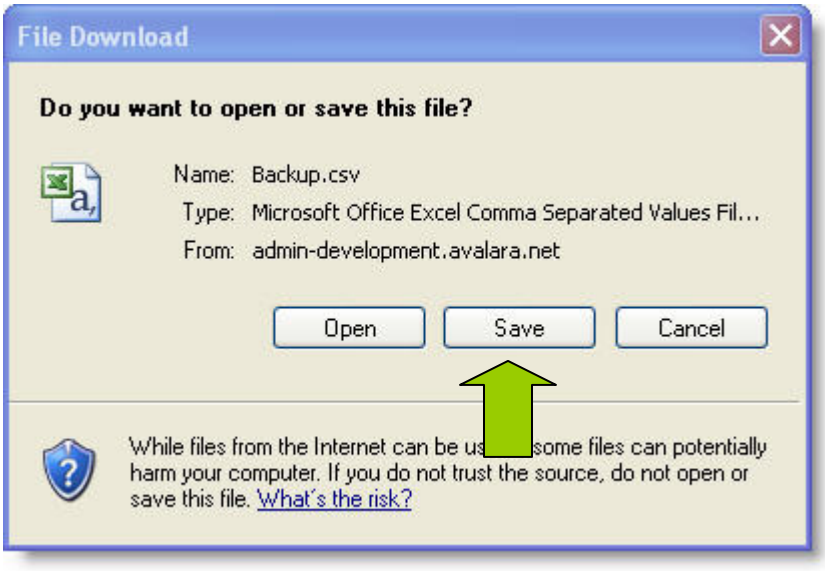
The Import Status screen is displayed providing access to the Import File List of previous Import activity.



The Import File List identifies all file imports attempted over the course of the previous 30 days. Each successful file import creates a Comma Delimited (.csv) Backup file of the Item to Tax Code mapping prior to the successful import of the current Item mapping. Any historical Import files can be deleted from the Import File List by selecting the check box to the left of the File Name, and pressing the Delete button at the top of the list.

The Backup hyper link provides access to a downloadable file that can be imported to revert to the previous Item mapping. By clicking on the Backup hyper link, the following dialog window is displayed:



Select the Save option, and store the file locally. The process to import both new and Backup files is reviewed below.

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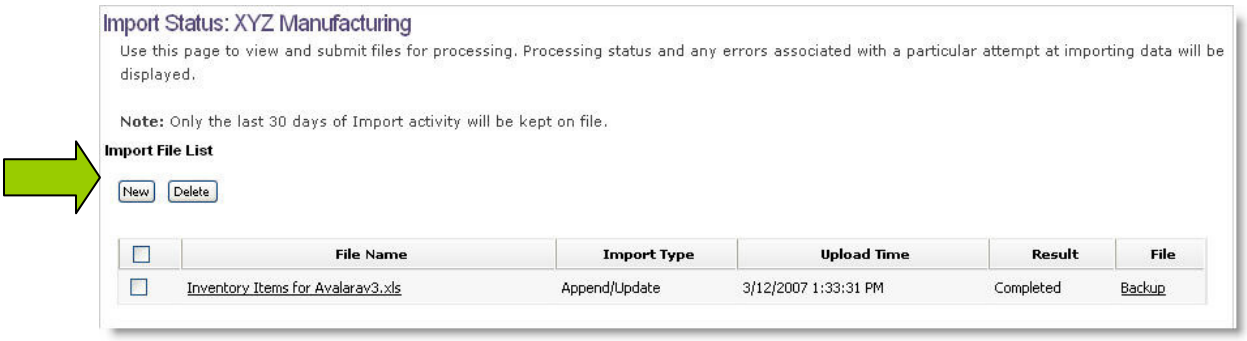
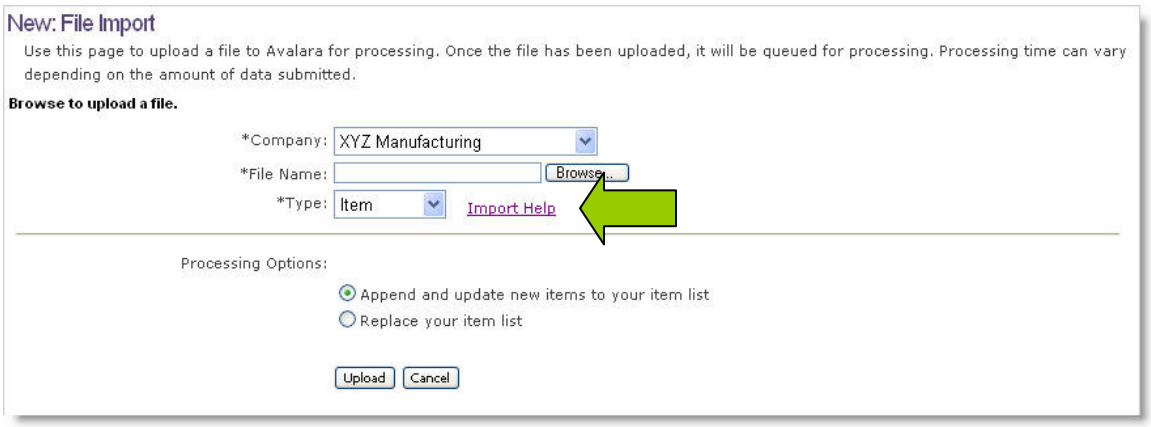
To begin the Import process, select the New button on the top left of the Import Status screen.



The File Import screen is displayed identifying the selection of import parameters required to begin the import process.



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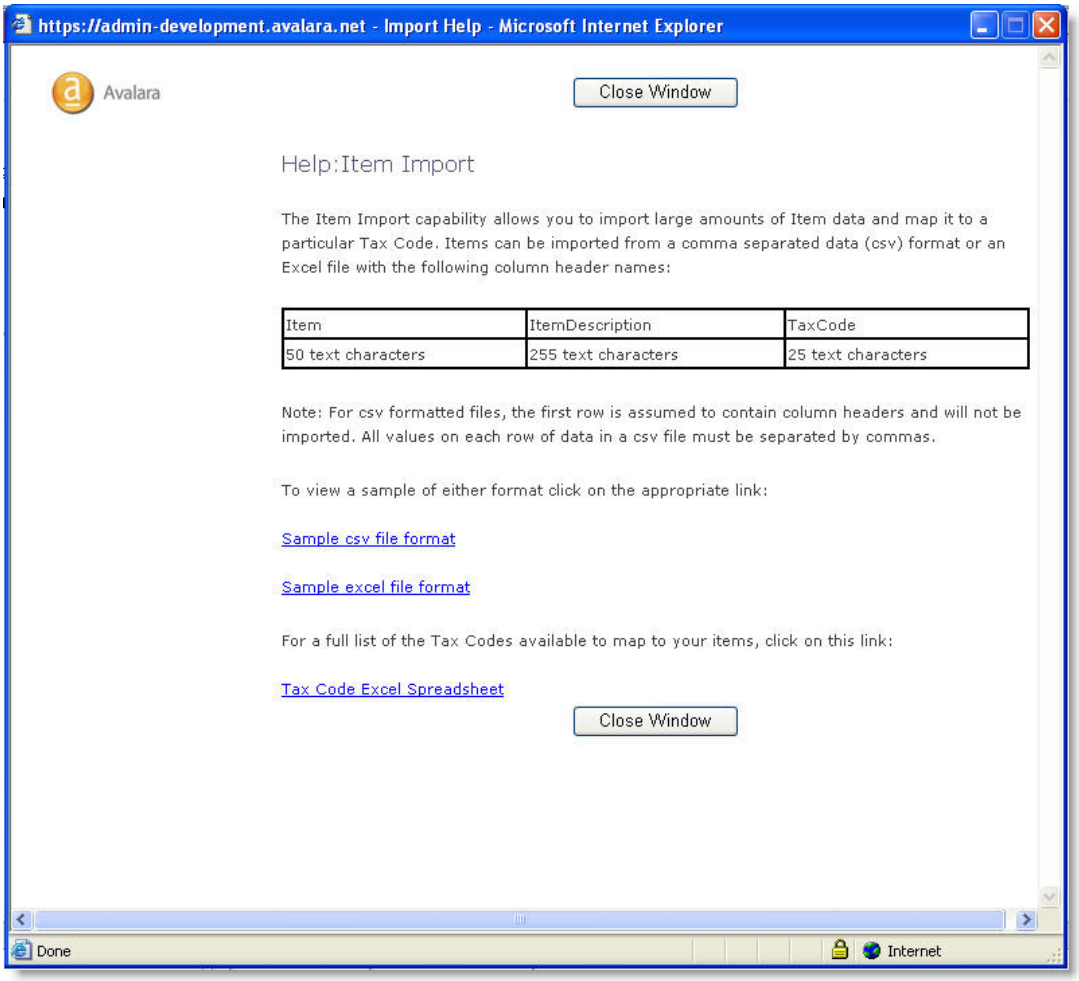
The Import functionality utilizes either a Comma Delimited (.csv) or Excel worksheet (.xls) file to facilitate the import of Item to Tax Code mapping. By selecting the Import Help hyper link found below the File Name Browse button, the following dialog window is displayed:



When utilizing either the Comma Delimited or standard Excel worksheet to import the Item mapping, row 1 of the file must contain the following column headings:

- Column A – Item
- Column B – ItemDescription
- Column C – TaxCode

Sample file formats can be downloaded from the Sample csv file format or the Sample excel file format hyper links on the Import Help dialog window. In

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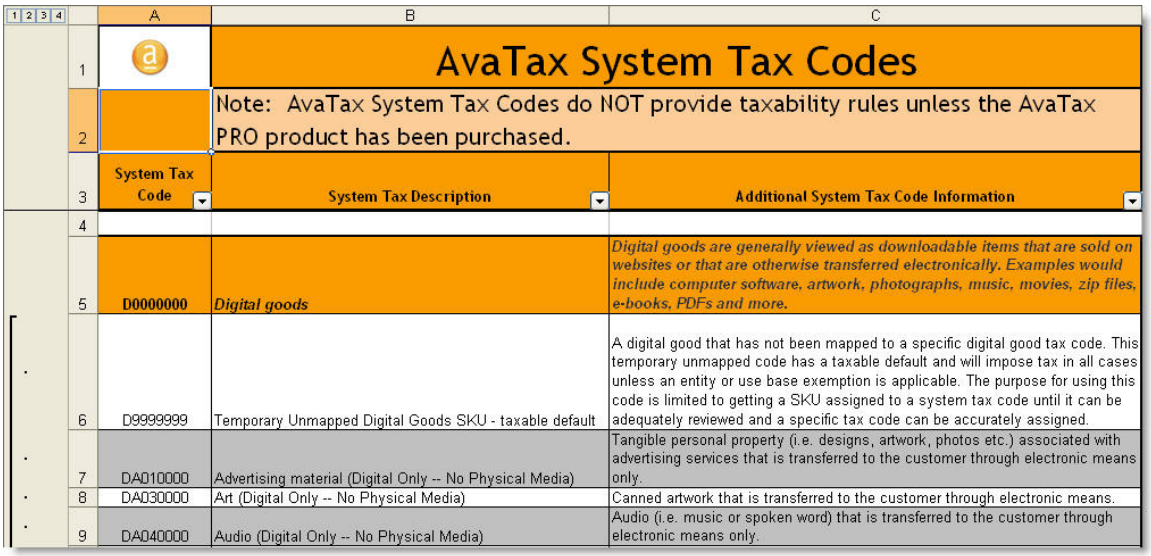
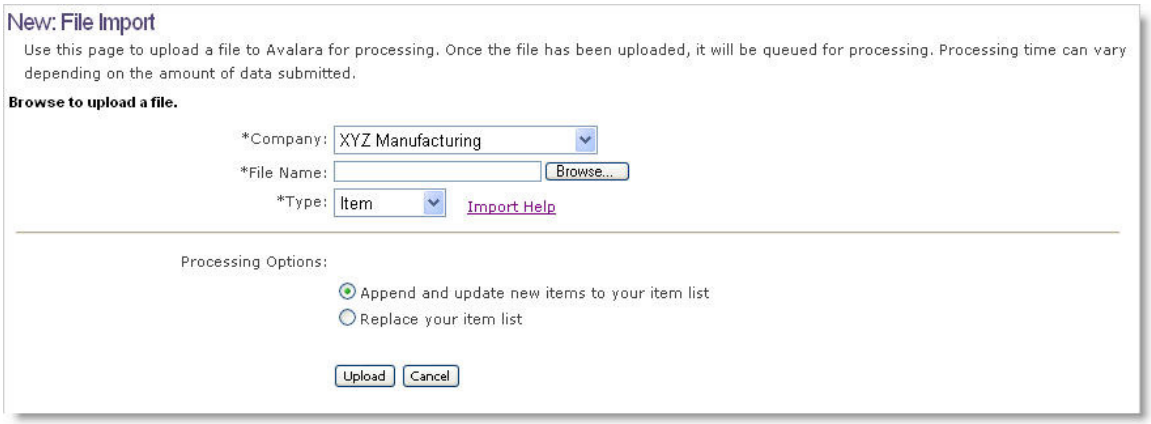
addition, the Tax Code Excel Spreadsheet hyper link provides access to the AvaTax System Tax Code list.



	A	B	C
1		AvaTax System Tax Codes	
2		Note: AvaTax System Tax Codes do NOT provide taxability rules unless the AvaTax PRO product has been purchased.	
3	System Tax Code	System Tax Description	Additional System Tax Code Information
4			
5	D0000000	*Digital goods*	*Digital goods are generally viewed as downloadable items that are sold on websites or that are otherwise transferred electronically. Examples would include computer software, artwork, photographs, music, movies, zip files, e-books, PDFs and more.*
6	D9999999	Temporary Unmapped Digital Goods SKU - taxable default	A digital good that has not been mapped to a specific digital good tax code. This temporary unmapped code has a taxable default and will impose tax in all cases unless an entity or use base exemption is applicable. The purpose for using this code is limited to getting a SKU assigned to a system tax code until it can be adequately reviewed and a specific tax code can be accurately assigned.
7	DA010000	Advertising material (Digital Only -- No Physical Media)	Tangible personal property (i.e. designs, artwork, photos etc.) associated with advertising services that is transferred to the customer through electronic means only.
8	DA030000	Art (Digital Only -- No Physical Media)	Canned artwork that is transferred to the customer through electronic means.
9	DA040000	Audio (Digital Only -- No Physical Media)	Audio (i.e. music or spoken word) that is transferred to the customer through electronic means only.

Upon preparing the import file in either accepted format, return to the File Import screen:



1. Select the desired Company from the Company drop down menu
2. Utilizing the Browse button, select the desired Import file
3. Identify the desired Processing Option:
    a. Append and update new items to your item list
    b. Replace your item list
4. Press the Upload button

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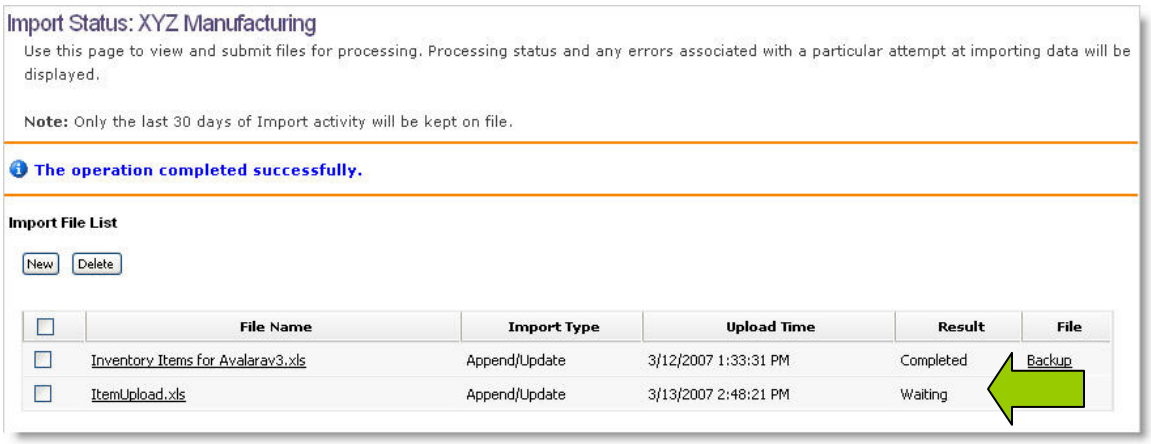
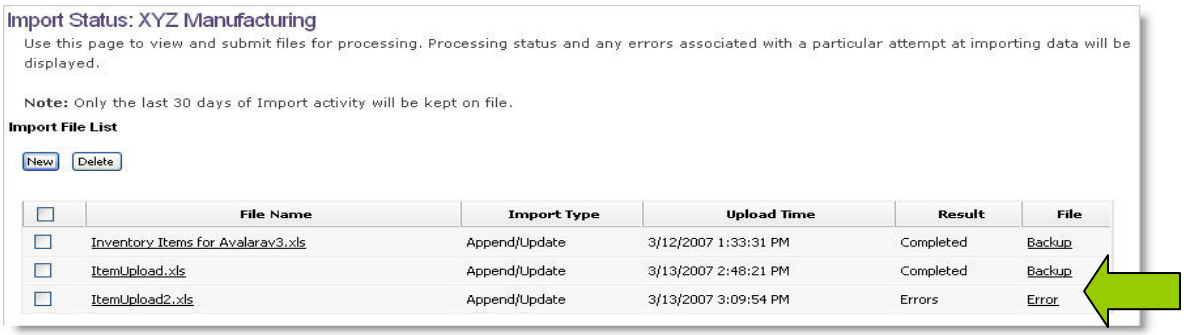
The Import Status screen is returned, and the Item to Tax Code mapping worksheet is queued for processing. The initial Result returned is Waiting.



Upon successful completion of the import, the Result field updates to a status of Completed, and the File field is populated with a hyper link named Backup that provides access to a Comma Delimited file containing copy of the Item list contained in the AvaTax Dashboard prior to the import of the current Item update.

If an error is found in the Item import file, the entire import is aborted and a Result of Errors is displayed. The File field is populated with a hyper link named Error that provides access to an Excel worksheet identifying the specific



error(s) causing the import failure. Clicking on the Error hyper link calls the following dialog window:

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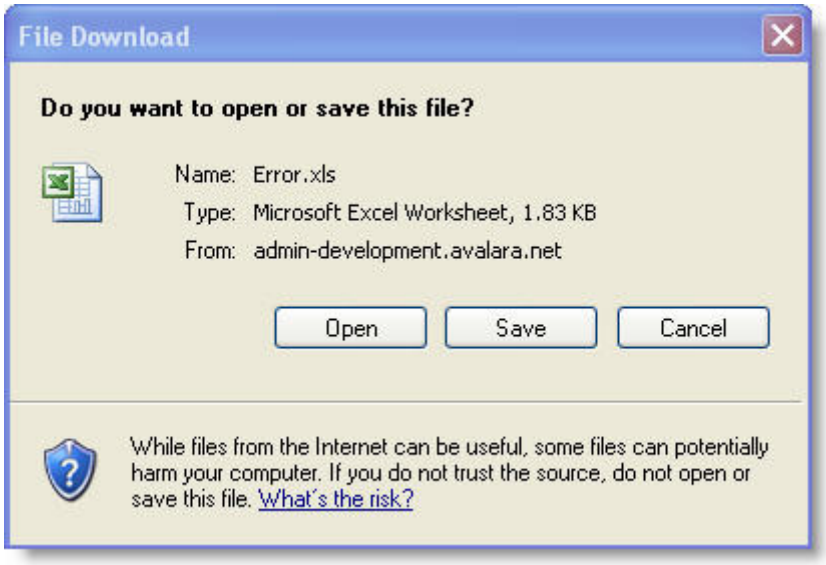

Pressing the Open button displays the Excel worksheet identifying the lines causing the error.

	A	B	C	D
1	Item	ItemDescription	TaxCode	Errors
2		Application Software - delivered on CD	DC010400	ItemCode Missing --
3	SW-001-54351		DC010500	ItemDescription Missing --
4	HW-015-75001	7500 series Desktop Hardware - CPU		TaxCode Missing --
5				

Edit the original Item import file, repair the lines causing the error, and repeat the Import Process.

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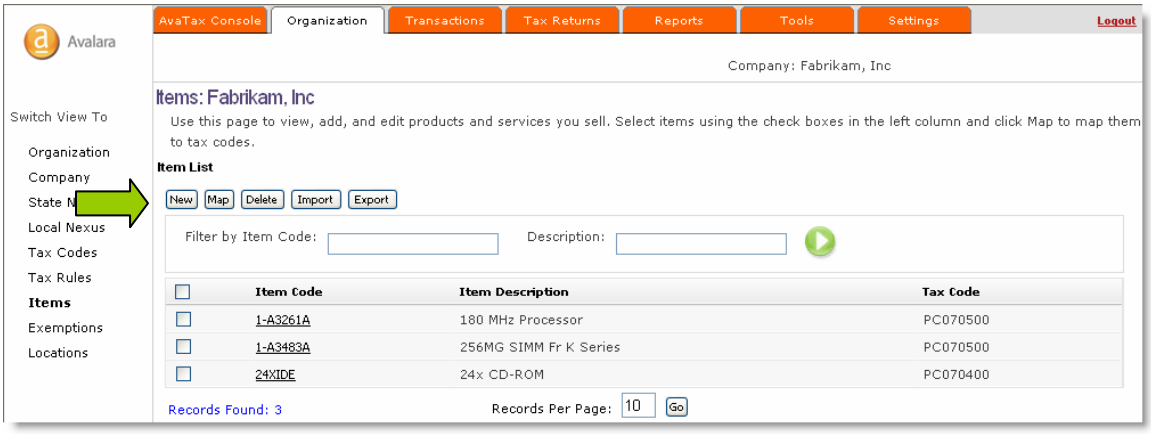
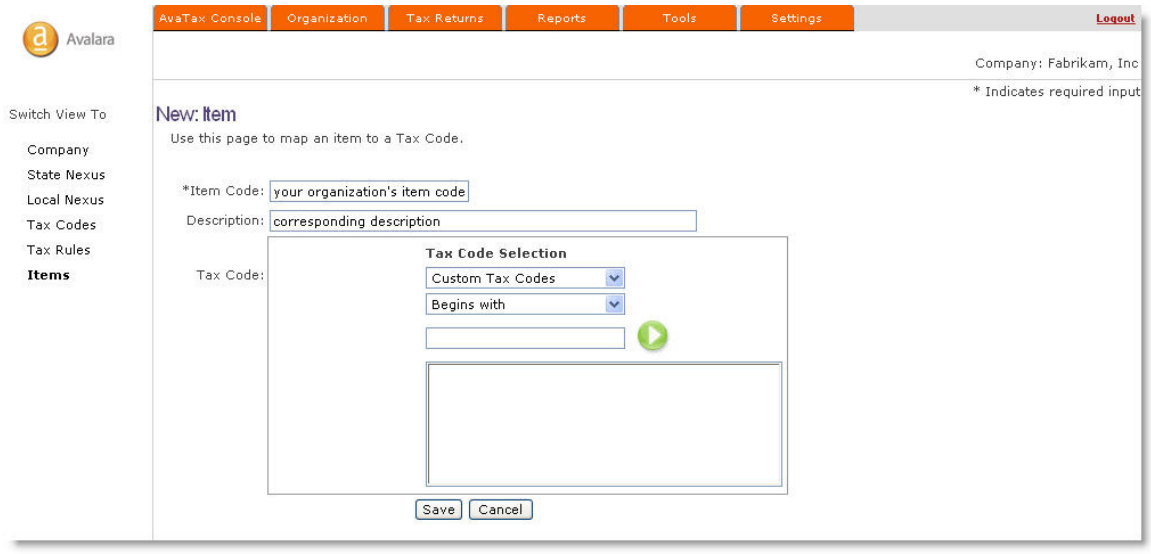
The AvaTax Dashboard provides a User Interface to manually add Item/Tax Code mappings or edit existing Item/Tax Code Mappings. After accessing the AvaTax Dashboard Items screen, a complete listing of the current Item mappings is displayed.



To manually add an Item Mapping record, press the New button. A separate screen is displayed provide the User Interface to add Item/Tax Code mappings.



On the Window identified as Tax Code:

1. Change the Tax Code Selection drop down list from Custom Tax Codes, TO *System Tax Codes*
2. Record the first characters of the AvaTax System Tax Code in the field below the *Begins with* drop down menu
3. Press the green refresh button

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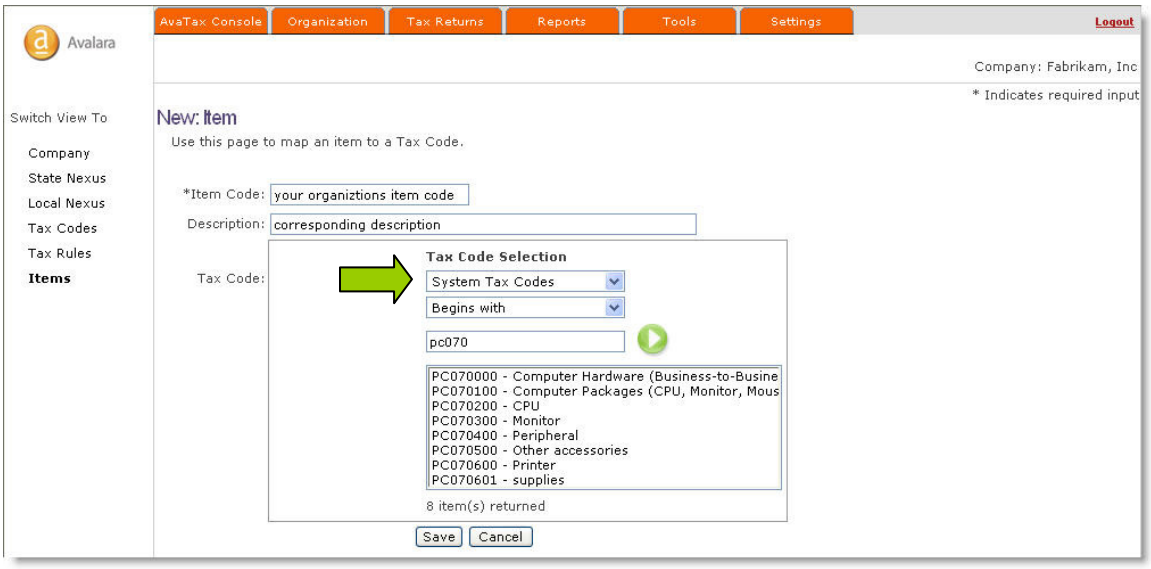
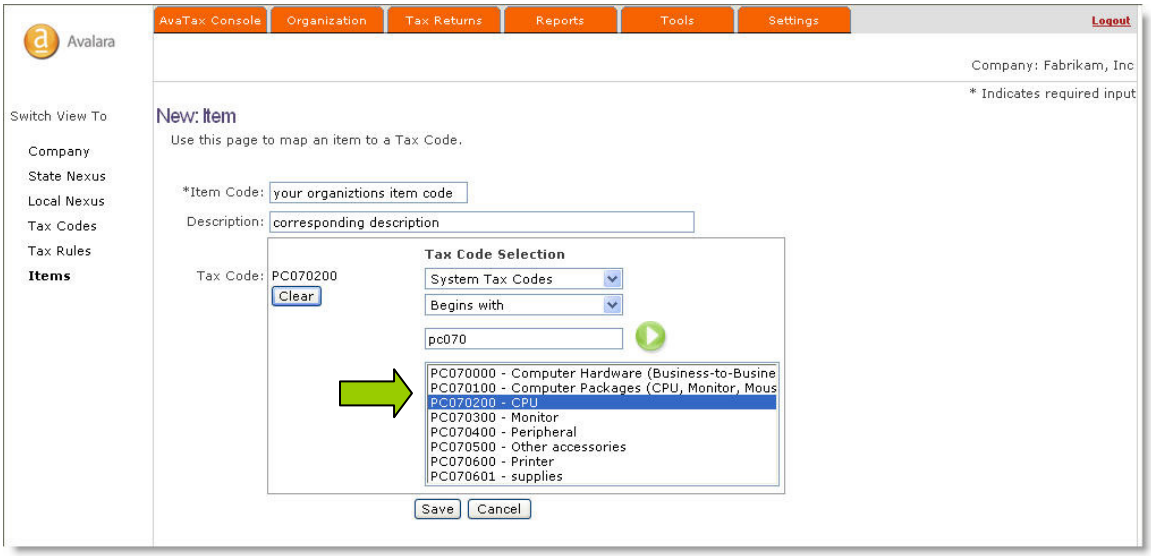
4. A list of corresponding AvaTax System Tax Codes is displayed in the window below



5. Click on the desired AvaTax Tax Code



6. Press the Save button

In order to edit an existing Item/Tax Code mapping, click on the Item Code displayed on the Items page, and make the required update utilizing the User Interface.

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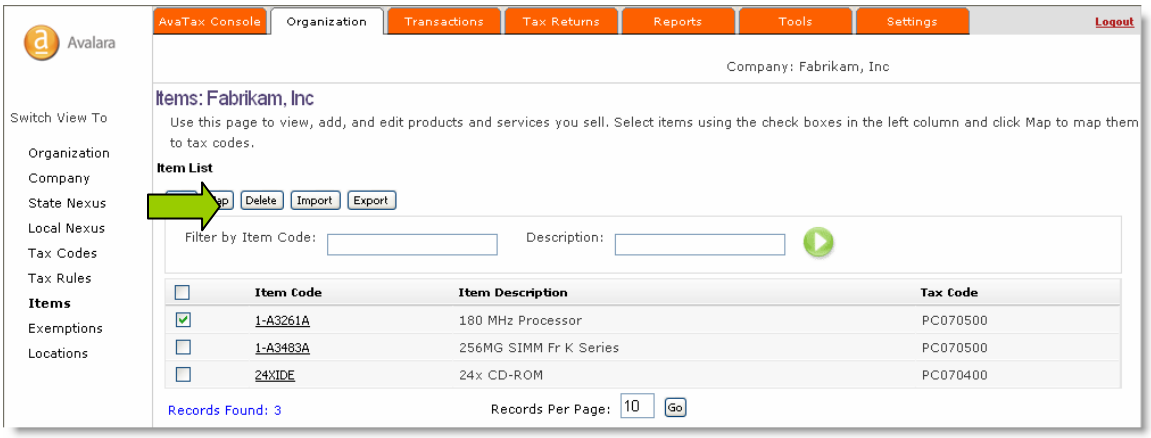
To delete an Item/Tax Code mapping, place a check in the Check Box to the left of the Item Code field, and press the Delete button displayed at the top of the screen.



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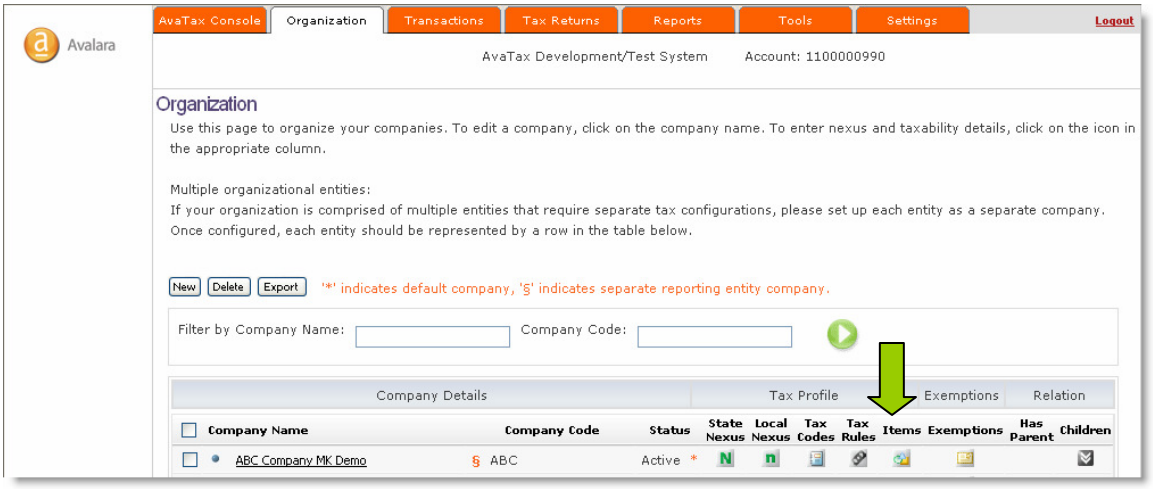
MAS 90/200

Item to Tax Code mapping can be maintained on your organization's AvaTax Dashboard. On the Organization Tab of the AvaTax Dashboard, the Items button, under the Tax Profile column heading, provides access to the cross reference between Item Code and Tax Code.



There are two methods to create a cross reference between your organization's Item codes and the AvaTax System Tax Codes using the AvaTax Dashboard Items functionality. One method utilizes an Excel worksheet to upload a large number of Item/Tax Code mappings, and the second method utilizes a User Interface directly on the Dashboard to enter the Item/Tax Code record.

To record a large number of Item/Tax Code mappings, the 4.12 Release of the AvaTax service adds Import functionality to the Tools tab of the AvaTax Dashboard. End user's may now import their Item to Tax Code mapping directly from the AvaTax Dashboard utilizing either a Comma Delimited file (.csv) or a standard Excel worksheet (.xls).

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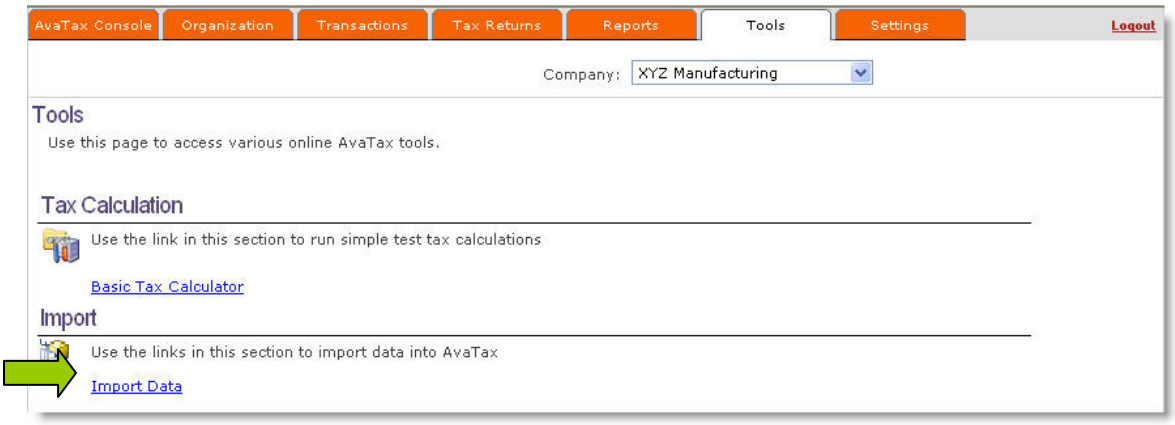
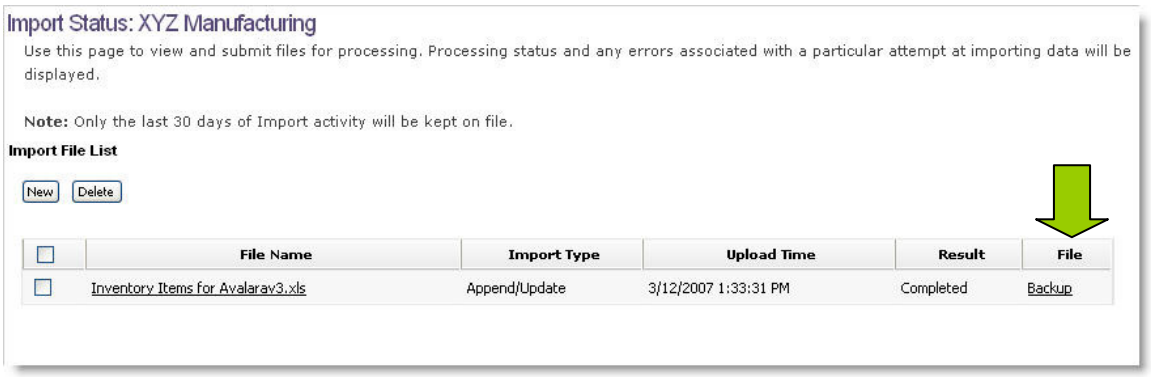
Selecting the Import Data hyper link provides access to the Import user interface.



The Import Status screen is displayed providing access to the Import File List of previous Import activity.



The Import File List identifies all file imports attempted over the course of the previous 30 days. Each successful file import creates a Comma Delimited (.csv) Backup file of the Item to Tax Code mapping prior to the successful import of the current Item mapping. Any historical Import files can be deleted from the Import File List by selecting the check box to the left of the File Name, and pressing the Delete button at the top of the list.

The Backup hyper link provides access to a downloadable file that can be imported to revert to the previous Item mapping. By clicking on the Backup hyper link, the following dialog window is displayed:

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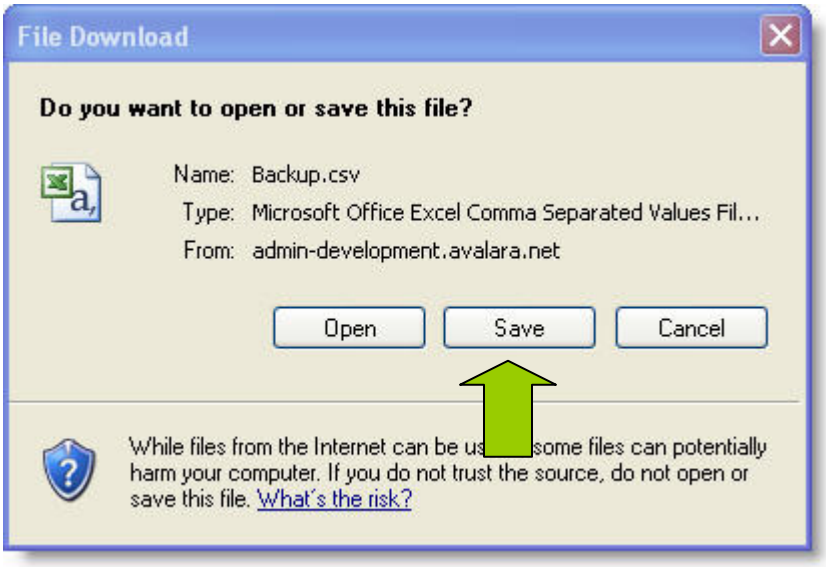

Select the Save option, and store the file locally. The process to import both new and Backup files is reviewed below.

To begin the Import process, select the New button on the top left of the Import Status screen.

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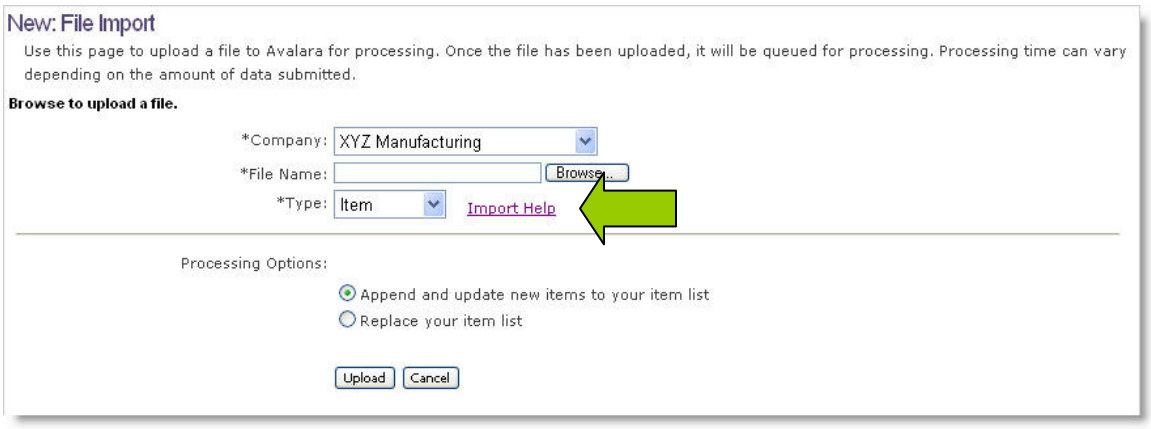
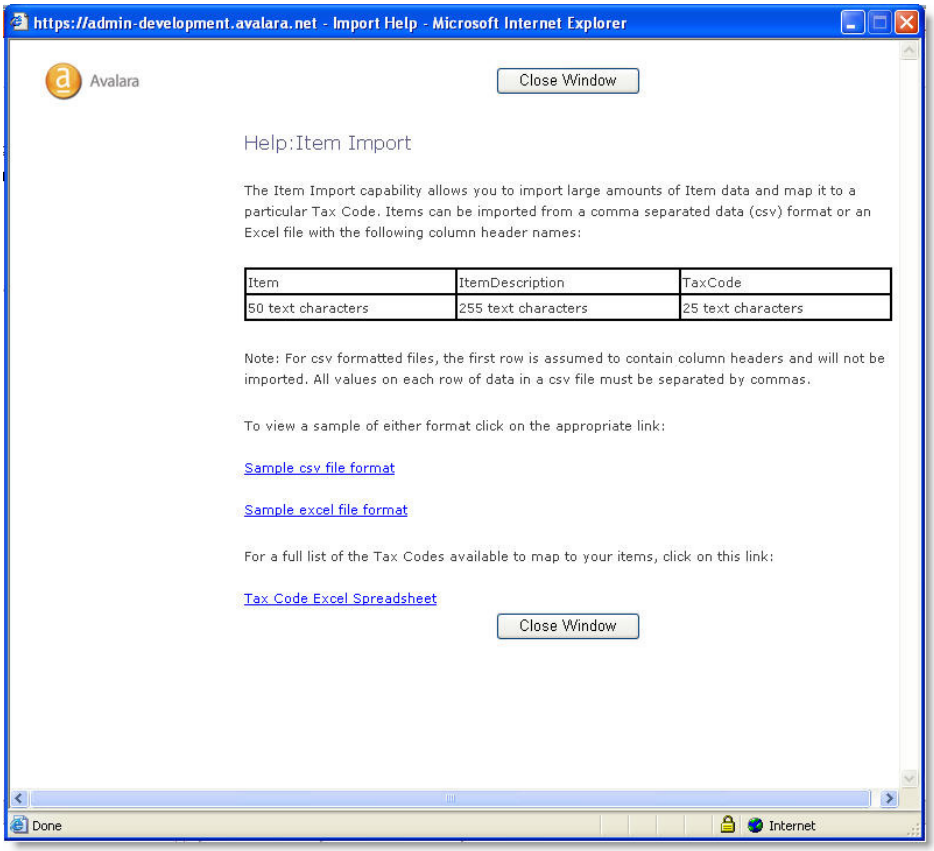
The File Import screen is displayed identifying the selection of import parameters required to begin the import process.



The Import functionality utilizes either a Comma Delimited (.csv) or Excel worksheet (.xls) file to facilitate the import of Item to Tax Code mapping. By selecting the Import Help hyper link found below the File Name Browse button, the following dialog window is displayed:



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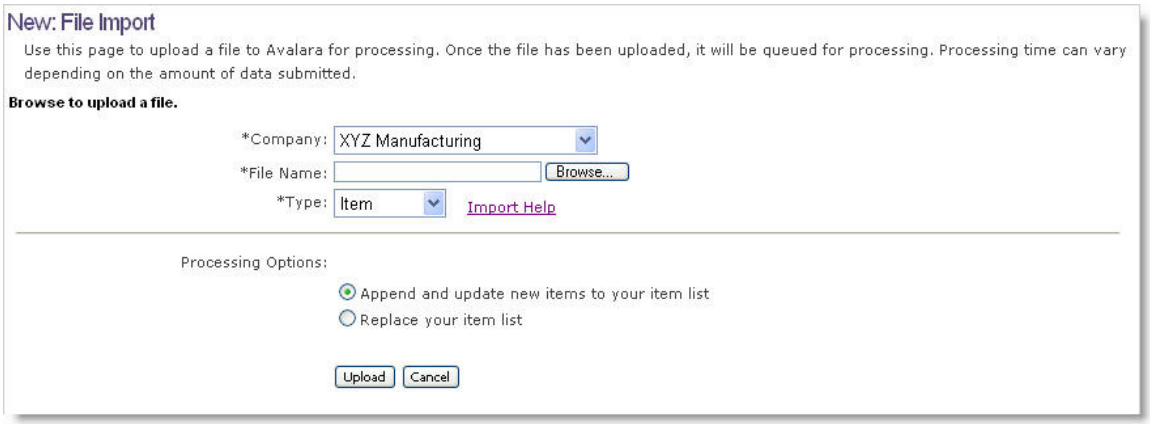
When utilizing either the Comma Delimited or standard Excel worksheet to import the Item mapping, row 1 of the file must contain the following column headings:

- Column A – Item
- Column B – ItemDescription
- Column C – TaxCode

Sample file formats can be downloaded from the Sample csv file format or the Sample excel file format hyper links on the Import Help dialog window. In addition, the Tax Code Excel Spreadsheet hyper link provides access to the AvaTax System Tax Code list.

	A	B	C
1		**AvaTax System Tax Codes**	
2		Note: AvaTax System Tax Codes do NOT provide taxability rules unless the AvaTax PRO product has been purchased.	
3	**System Tax Code**	**System Tax Description**	**Additional System Tax Code Information**
4			
5	**D0000000**	***Digital goods***	***Digital goods are generally viewed as downloadable items that are sold on websites or that are otherwise transferred electronically. Examples would include computer software, artwork, photographs, music, movies, zip files, e-books, PDFs and more.***
6	D9999999	Temporary Unmapped Digital Goods SKU - taxable default	A digital good that has not been mapped to a specific digital good tax code. This temporary unmapped code has a taxable default and will impose tax in all cases unless an entity or use base exemption is applicable. The purpose for using this code is limited to getting a SKU assigned to a system tax code until it can be adequately reviewed and a specific tax code can be accurately assigned.
7	DA010000	Advertising material (Digital Only -- No Physical Media)	Tangible personal property (i.e. designs, artwork, photos etc.) associated with advertising services that is transferred to the customer through electronic means only.
8	DA030000	Art (Digital Only -- No Physical Media)	Canned artwork that is transferred to the customer through electronic means.
9	DA040000	Audio (Digital Only -- No Physical Media)	Audio (i.e. music or spoken word) that is transferred to the customer through electronic means only.

Upon preparing the import file in either accepted format, return to the File Import screen:



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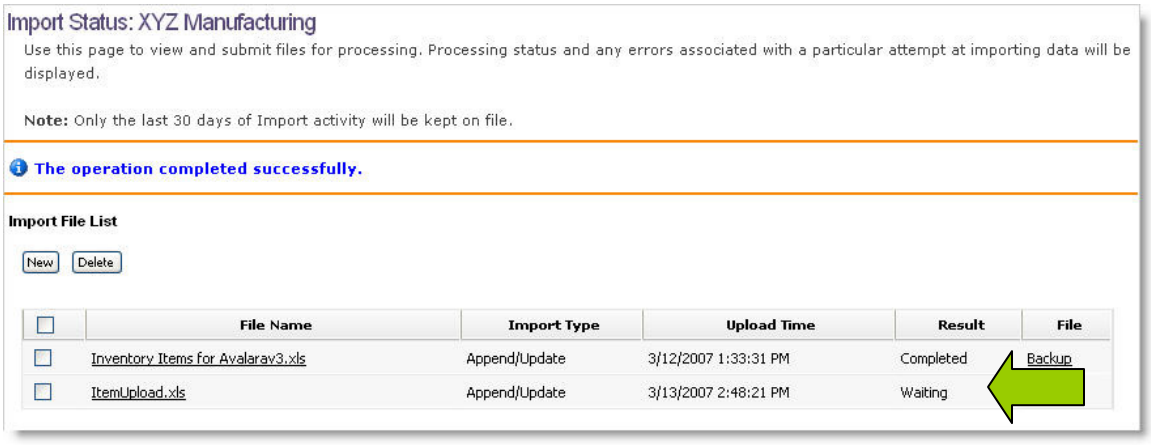
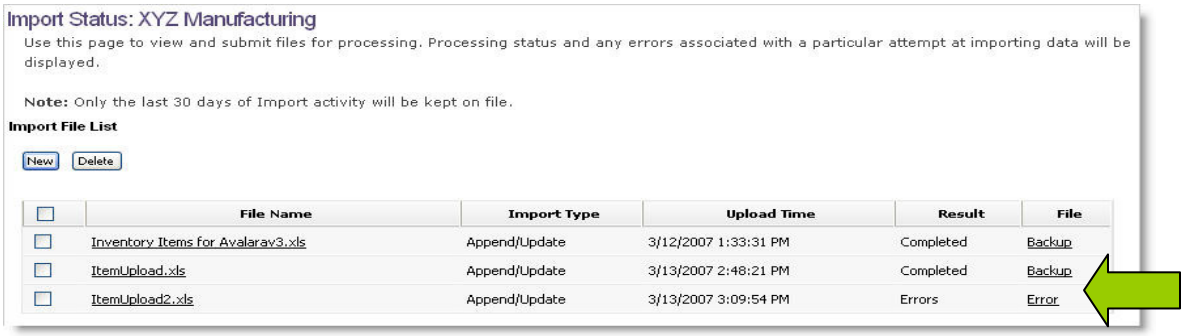
1. Select the desired Company from the Company drop down menu
2. Utilizing the Browse button, select the desired Import file
3. Identify the desired Processing Option:
    a. Append and update new items to your item list
    b. Replace your item list
4. Press the Upload button

The Import Status screen is returned, and the Item to Tax Code mapping worksheet is queued for processing. The initial Result returned is Waiting.



Upon successful completion of the import, the Result field updates to a status of Completed, and the File field is populated with a hyper link named Backup that provides access to a Comma Delimited file containing copy of the Item list contained in the AvaTax Dashboard prior to the import of the current Item update.

If an error is found in the Item import file, the entire import is aborted and a Result of Errors is displayed. The File field is populated with a hyper link named Error that provides access to an Excel worksheet identifying the specific



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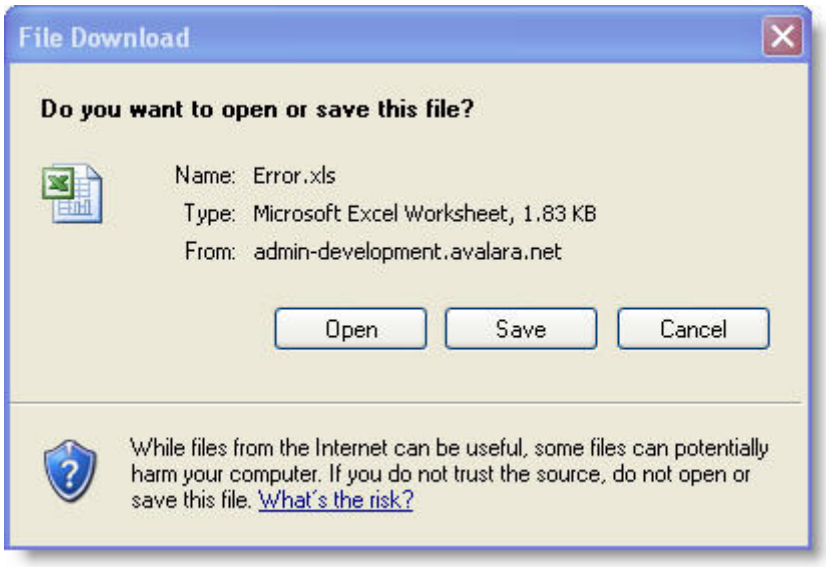
error(s) causing the import failure. Clicking on the Error hyper link calls the following dialog window:



Pressing the Open button displays the Excel worksheet identifying the lines causing the error.

	A	B	C	D
1	Item	ItemDescription	TaxCode	Errors
2		Application Software - delivered on CD	DC010400	ItemCode Missing --
3	SW-001-54351		DC010500	ItemDescription Missing --
4	HW-015-75001	7500 series Desktop Hardware - CPU		TaxCode Missing --
5				

Edit the original Item import file, repair the lines causing the error, and repeat the Import Process.

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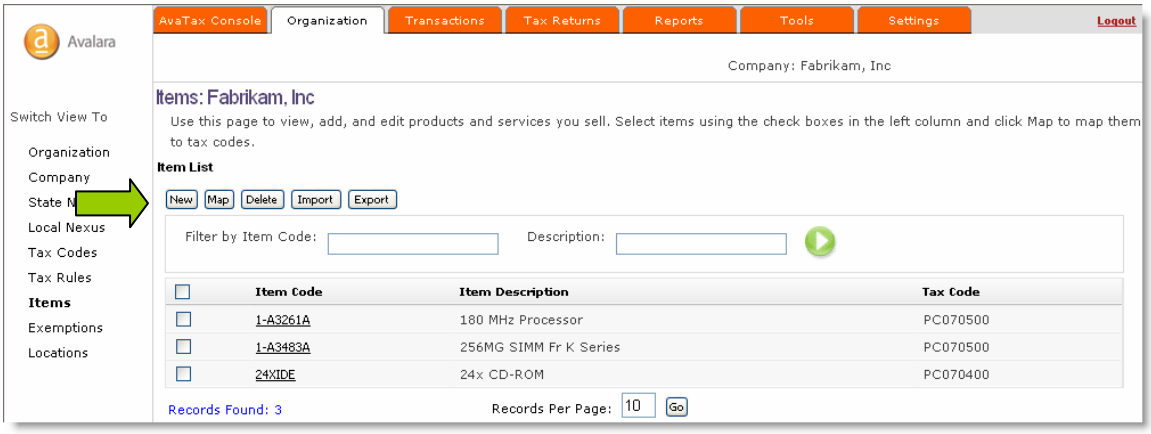
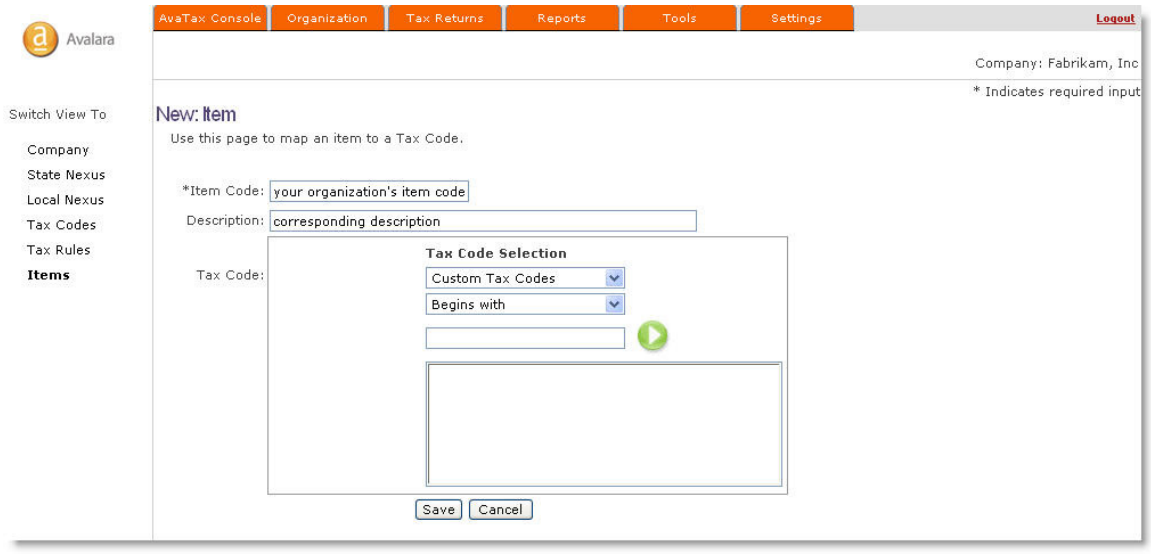
The AvaTax Dashboard provides a User Interface to manually add Item/Tax Code mappings or edit existing Item/Tax Code Mappings. After accessing the AvaTax Dashboard Items screen, a complete listing of the current Item mappings is displayed.



To manually add an Item Mapping record, press the New button. A separate screen is displayed provide the User Interface to add Item/Tax Code mappings.



On the Window identified as Tax Code:

1. Change the Tax Code Selection drop down list from Custom Tax Codes, TO *System Tax Codes*
2. Record the first characters of the AvaTax System Tax Code in the field below the *Begins with* drop down menu
3. Press the green refresh button

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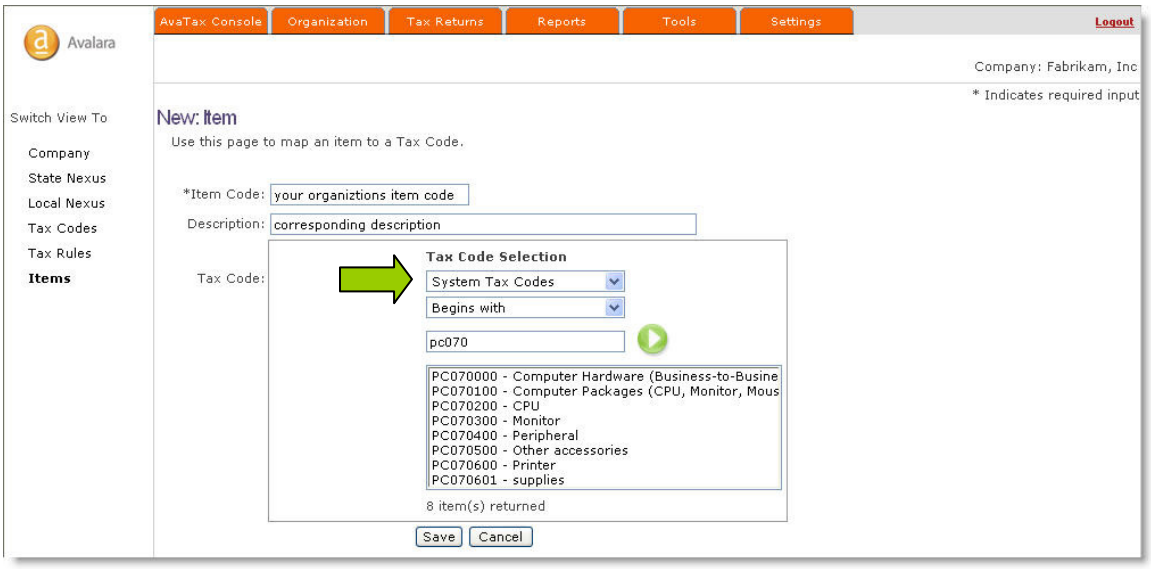
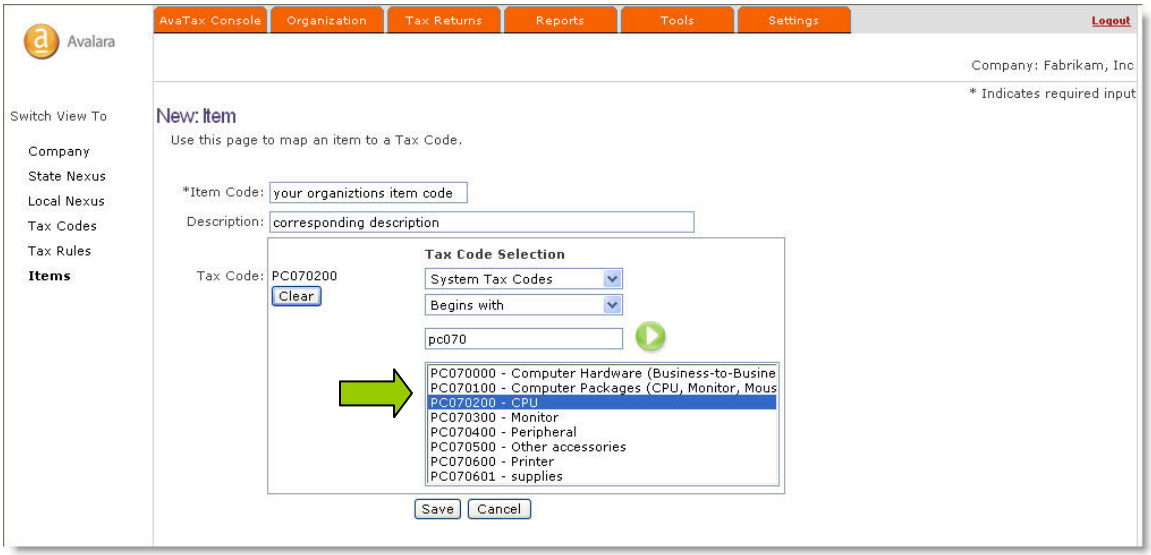
4. A list of corresponding AvaTax System Tax Codes is displayed in the window below



5. Click on the desired AvaTax Tax Code



6. Press the Save button

In order to edit an existing Item/Tax Code mapping, click on the Item Code displayed on the Items page, and make the required update utilizing the User Interface.

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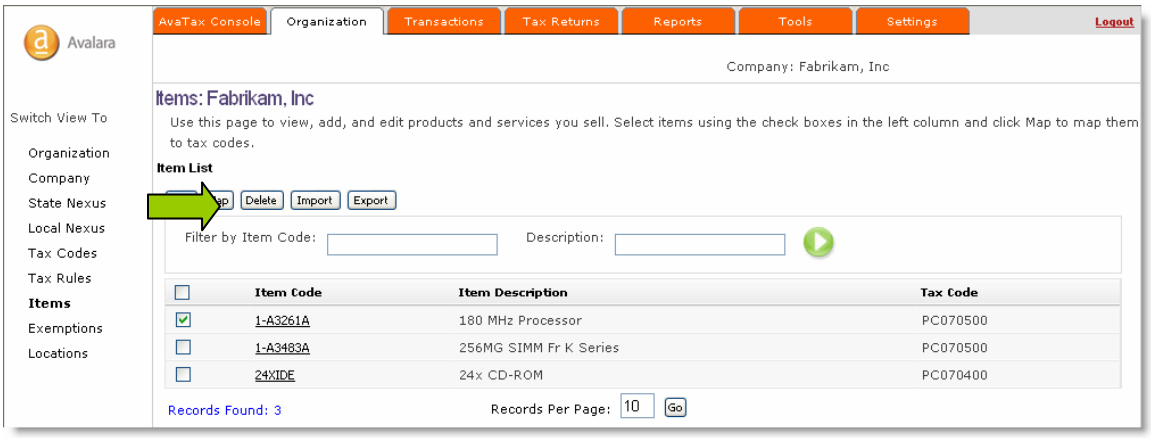
To delete an Item/Tax Code mapping, place a check in the Check Box to the left of the Item Code field, and press the Delete button displayed at the top of the screen.



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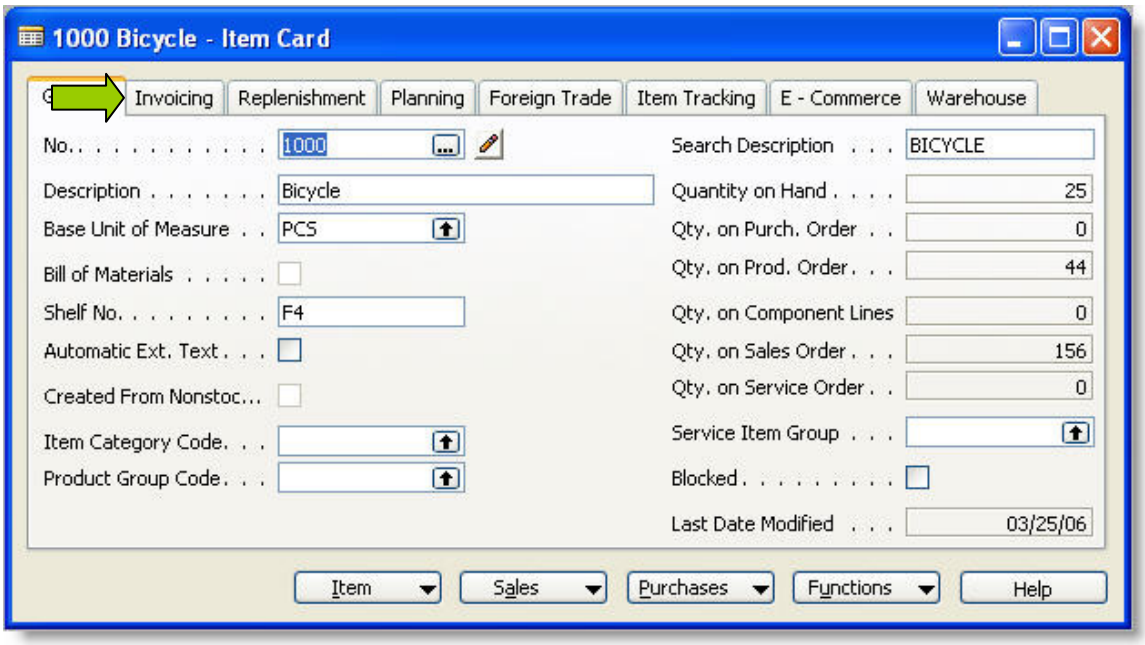
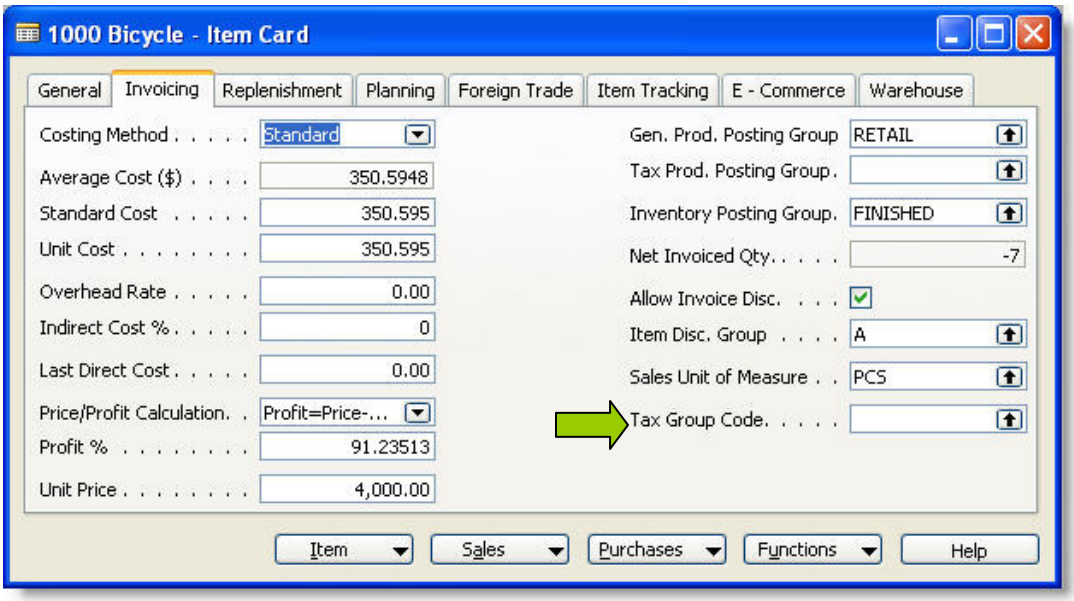
Navision

Option 1: The Item to Tax Code mapping can be facilitated directly on the Item Card within the Navision application. Access Item Maintenance within Navision, and select Invoicing tab along the top of the Item Card window.



On the Invoicing tab of the Item Card that is subsequently displayed, a Tax Group Code field is listed on the lower right side of the window.



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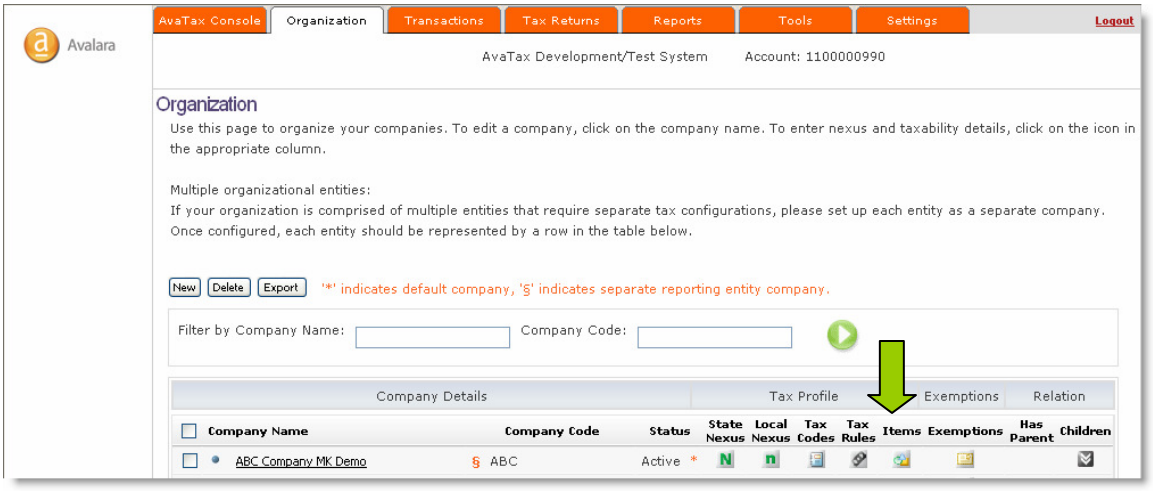
Record the eight (8) character AvaTax System Tax Code in the Tax Group Code field, and AvaTax will capture the Tax Code passing it with other transaction information for a sales tax calculation.

Option 2: Item to Tax Code mapping can be maintained on your organization's AvaTax Dashboard. On the Organization Tab of the AvaTax Dashboard, the Items button, under the Tax Profile column heading, provides access to the cross reference between Item Code and Tax Code.



There are two methods to create a cross reference between your organization's Item codes and the AvaTax System Tax Codes using the AvaTax Dashboard Items functionality. One method utilizes an Excel worksheet to upload a large number of Item/Tax Code mappings, and the second method utilizes a User Interface directly on the Dashboard to enter the Item/Tax Code record.

To record a large number of Item/Tax Code mappings, the 4.12 Release of the AvaTax service adds Import functionality to the Tools tab of the AvaTax Dashboard. End user's may now import their Item to Tax Code mapping directly from the AvaTax Dashboard utilizing either a Comma Delimited file (.csv) or a standard Excel worksheet (.xls).

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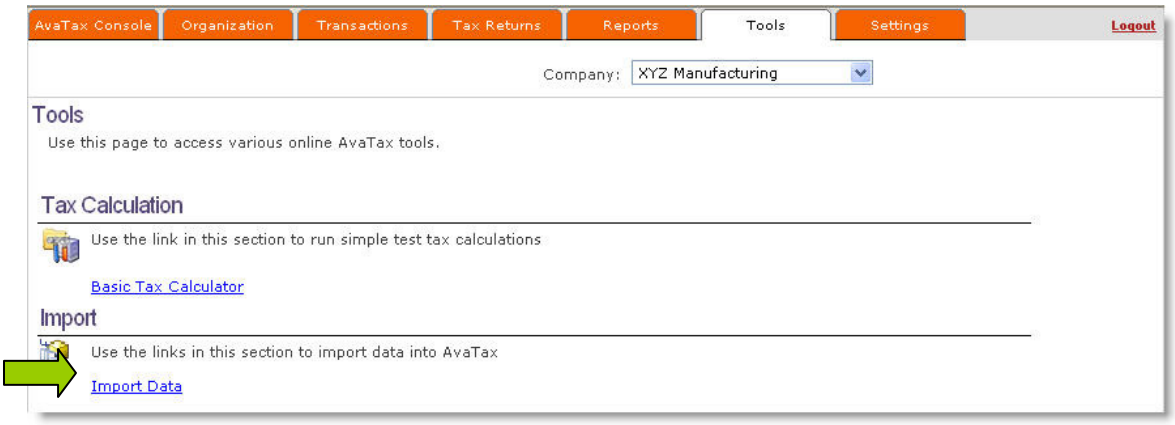
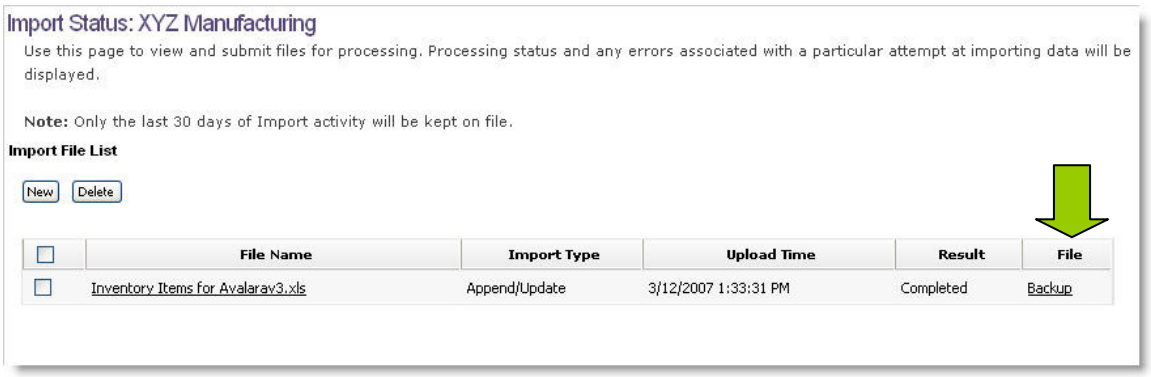
Selecting the Import Data hyper link provides access to the Import user interface.



The Import Status screen is displayed providing access to the Import File List of previous Import activity.



The Import File List identifies all file imports attempted over the course of the previous 30 days. Each successful file import creates a Comma Delimited (.csv) Backup file of the Item to Tax Code mapping prior to the successful import of the current Item mapping. Any historical Import files can be deleted from the Import File List by selecting the check box to the left of the File Name, and pressing the Delete button at the top of the list.

The Backup hyper link provides access to a downloadable file that can be imported to revert to the previous Item mapping. By clicking on the Backup hyper link, the following dialog window is displayed:

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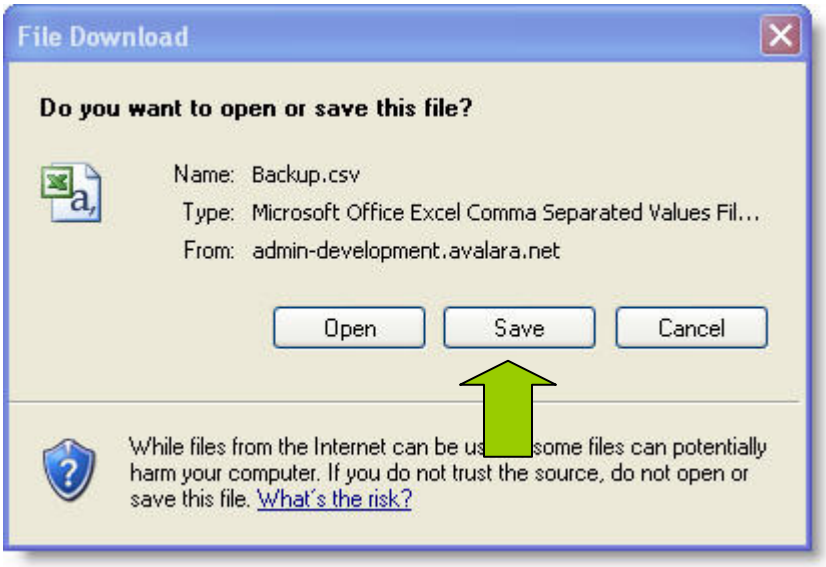

Select the Save option, and store the file locally. The process to import both new and Backup files is reviewed below.

To begin the Import process, select the New button on the top left of the Import Status screen.

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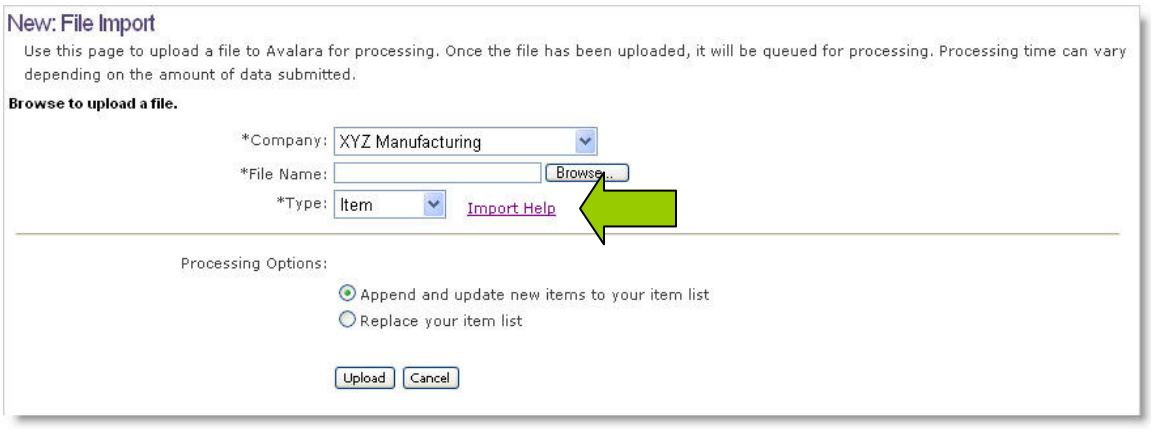
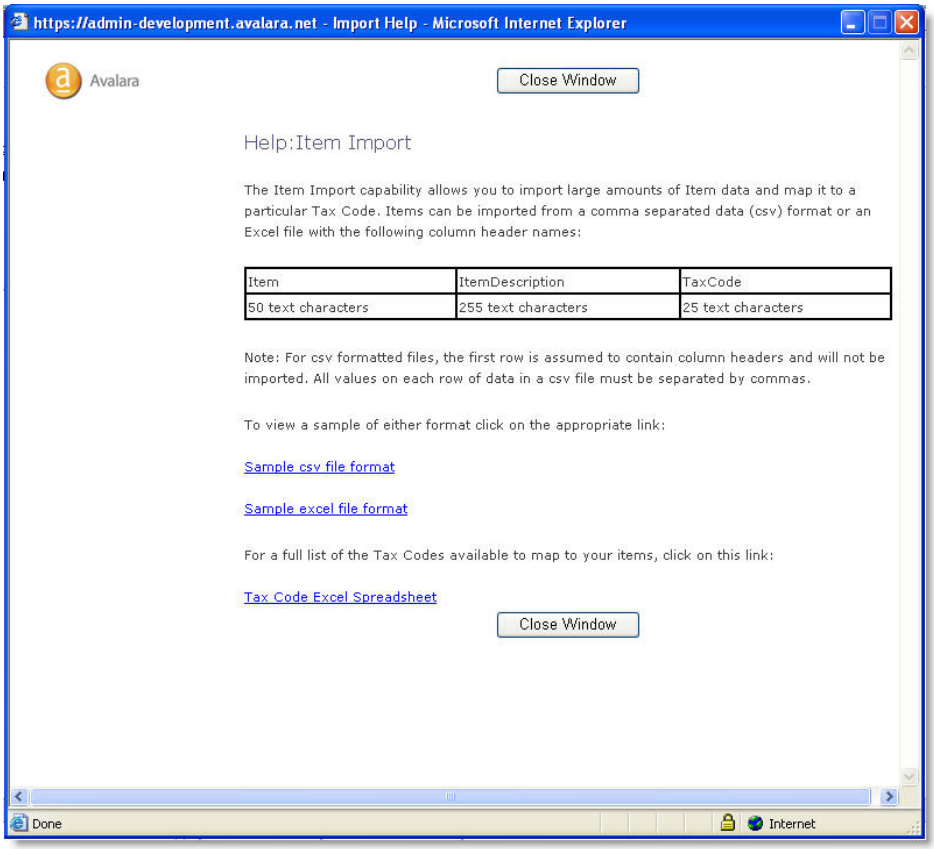
The File Import screen is displayed identifying the selection of import parameters required to begin the import process.



The Import functionality utilizes either a Comma Delimited (.csv) or Excel worksheet (.xls) file to facilitate the import of Item to Tax Code mapping. By selecting the Import Help hyper link found below the File Name Browse button, the following dialog window is displayed:



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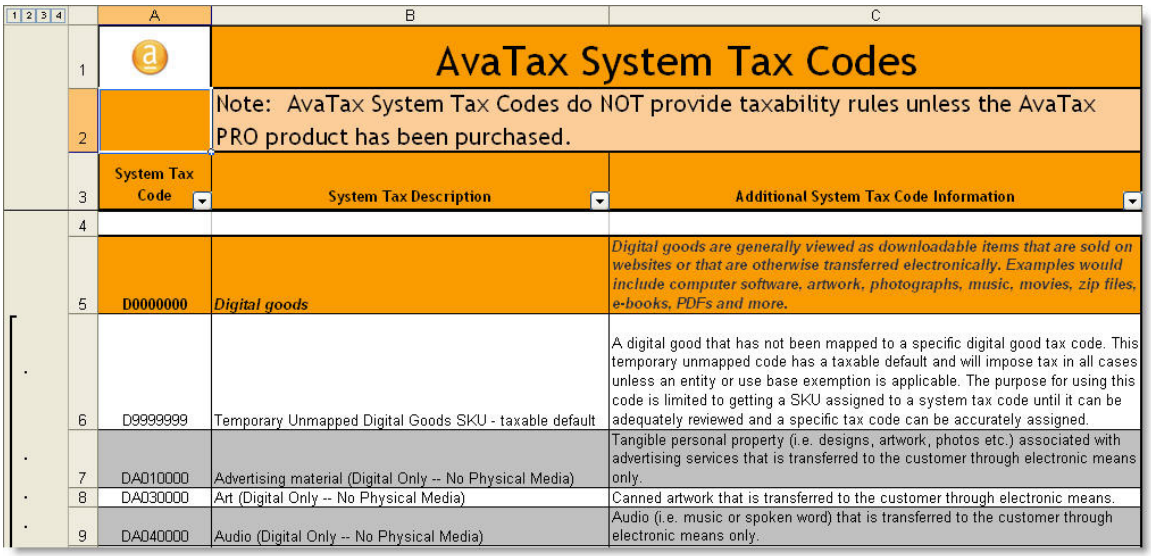
When utilizing either the Comma Delimited or standard Excel worksheet to import the Item mapping, row 1 of the file must contain the following column headings:

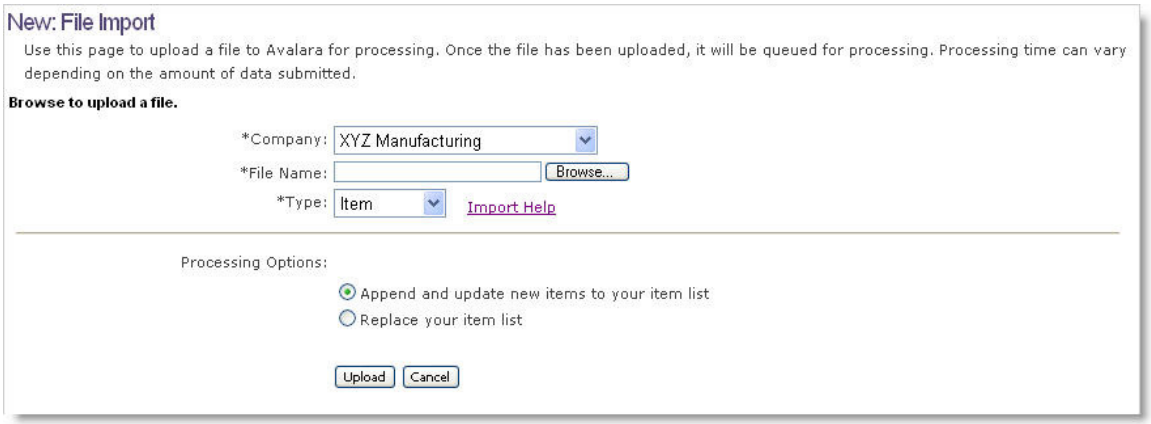
- Column A – Item
- Column B – ItemDescription
- Column C – TaxCode

Sample file formats can be downloaded from the Sample csv file format or the Sample excel file format hyper links on the Import Help dialog window. In addition, the Tax Code Excel Spreadsheet hyper link provides access to the AvaTax System Tax Code list.



	A	B	C
1		AvaTax System Tax Codes	
2		Note: AvaTax System Tax Codes do NOT provide taxability rules unless the AvaTax PRO product has been purchased.	
3	System Tax Code	System Tax Description	Additional System Tax Code Information
4			
5	D0000000	*Digital goods*	*Digital goods are generally viewed as downloadable items that are sold on websites or that are otherwise transferred electronically. Examples would include computer software, artwork, photographs, music, movies, zip files, e-books, PDFs and more.*
6	D9999999	Temporary Unmapped Digital Goods SKU - taxable default	A digital good that has not been mapped to a specific digital good tax code. This temporary unmapped code has a taxable default and will impose tax in all cases unless an entity or use base exemption is applicable. The purpose for using this code is limited to getting a SKU assigned to a system tax code until it can be adequately reviewed and a specific tax code can be accurately assigned.
7	DA010000	Advertising material (Digital Only -- No Physical Media)	Tangible personal property (i.e. designs, artwork, photos etc.) associated with advertising services that is transferred to the customer through electronic means only.
8	DA030000	Art (Digital Only -- No Physical Media)	Canned artwork that is transferred to the customer through electronic means.
9	DA040000	Audio (Digital Only -- No Physical Media)	Audio (i.e. music or spoken word) that is transferred to the customer through electronic means only.

Upon preparing the import file in either accepted format, return to the File Import screen:



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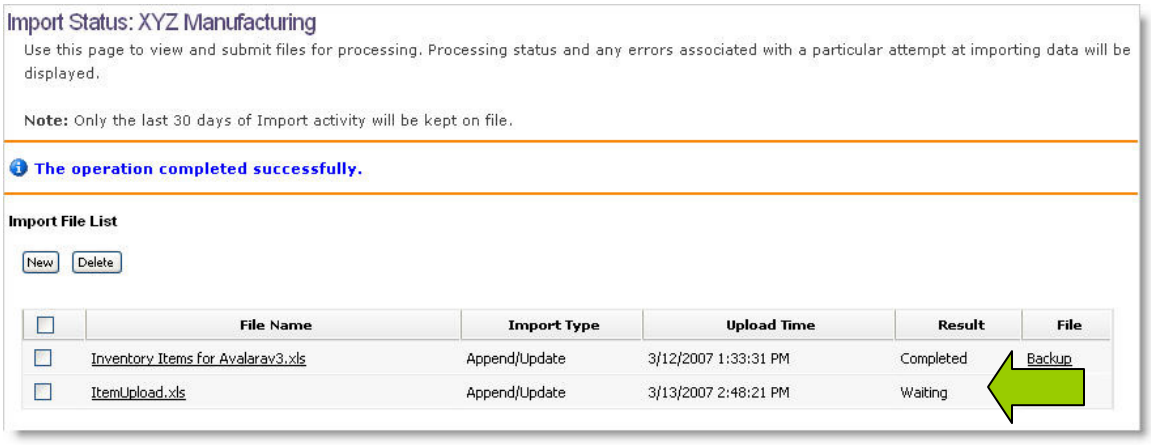
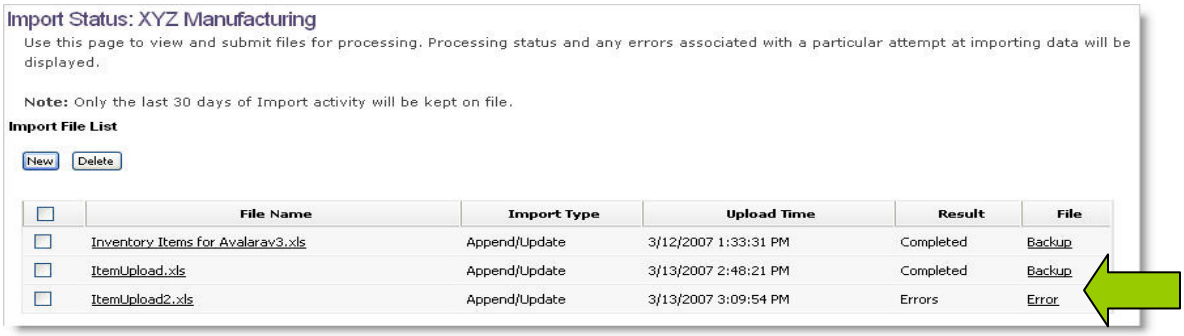
1. Select the desired Company from the Company drop down menu
2. Utilizing the Browse button, select the desired Import file
3. Identify the desired Processing Option:
    a. Append and update new items to your item list
    b. Replace your item list
4. Press the Upload button

The Import Status screen is returned, and the Item to Tax Code mapping worksheet is queued for processing. The initial Result returned is Waiting.



Upon successful completion of the import, the Result field updates to a status of Completed, and the File field is populated with a hyper link named Backup that provides access to a Comma Delimited file containing copy of the Item list contained in the AvaTax Dashboard prior to the import of the current Item update.

If an error is found in the Item import file, the entire import is aborted and a Result of Errors is displayed. The File field is populated with a hyper link named Error that provides access to an Excel worksheet identifying the specific



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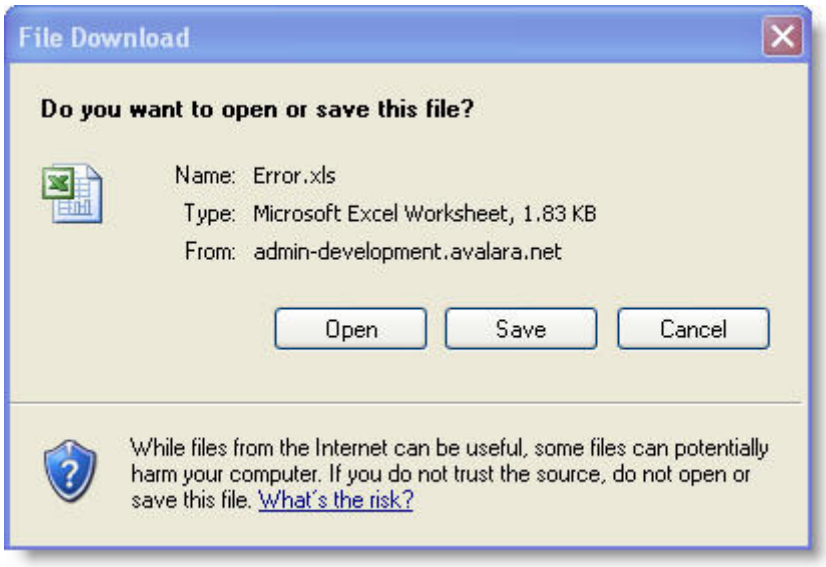
error(s) causing the import failure. Clicking on the Error hyper link calls the following dialog window:



Pressing the Open button displays the Excel worksheet identifying the lines causing the error.

	A	B	C	D
1	Item	ItemDescription	TaxCode	Errors
2		Application Software - delivered on CD	DC010400	ItemCode Missing --
3	SW-001-54351		DC010500	ItemDescription Missing --
4	HW-015-75001	7500 series Desktop Hardware - CPU		TaxCode Missing --
5				

Edit the original Item import file, repair the lines causing the error, and repeat the Import Process.

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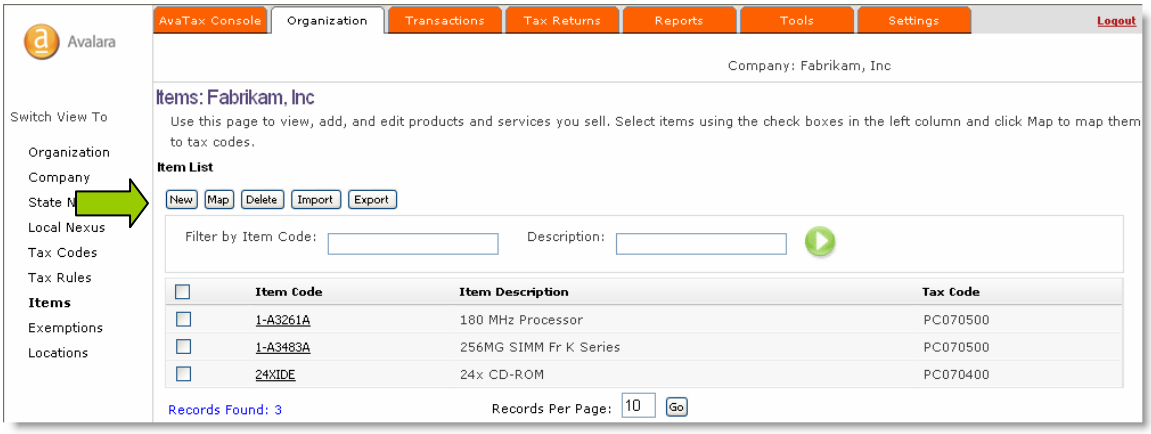
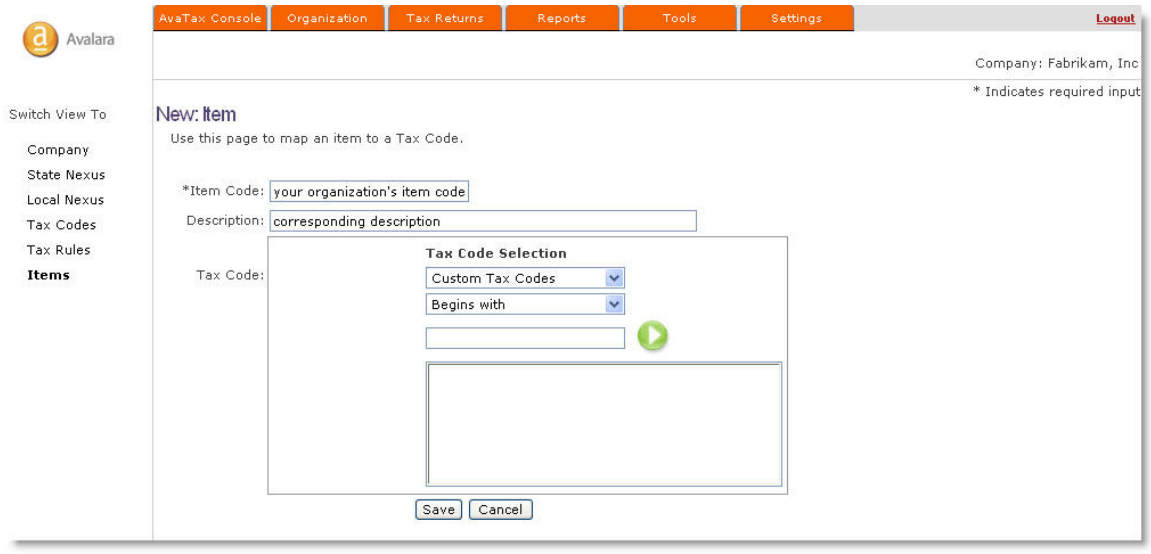
The AvaTax Dashboard provides a User Interface to manually add Item/Tax Code mappings or edit existing Item/Tax Code Mappings. After accessing the AvaTax Dashboard Items screen, a complete listing of the current Item mappings is displayed.



To manually add an Item Mapping record, press the New button. A separate screen is displayed provide the User Interface to add Item/Tax Code mappings.



On the Window identified as Tax Code:

1. Change the Tax Code Selection drop down list from Custom Tax Codes, TO *System Tax Codes*
2. Record the first characters of the AvaTax System Tax Code in the field below the *Begins with* drop down menu
3. Press the green refresh button

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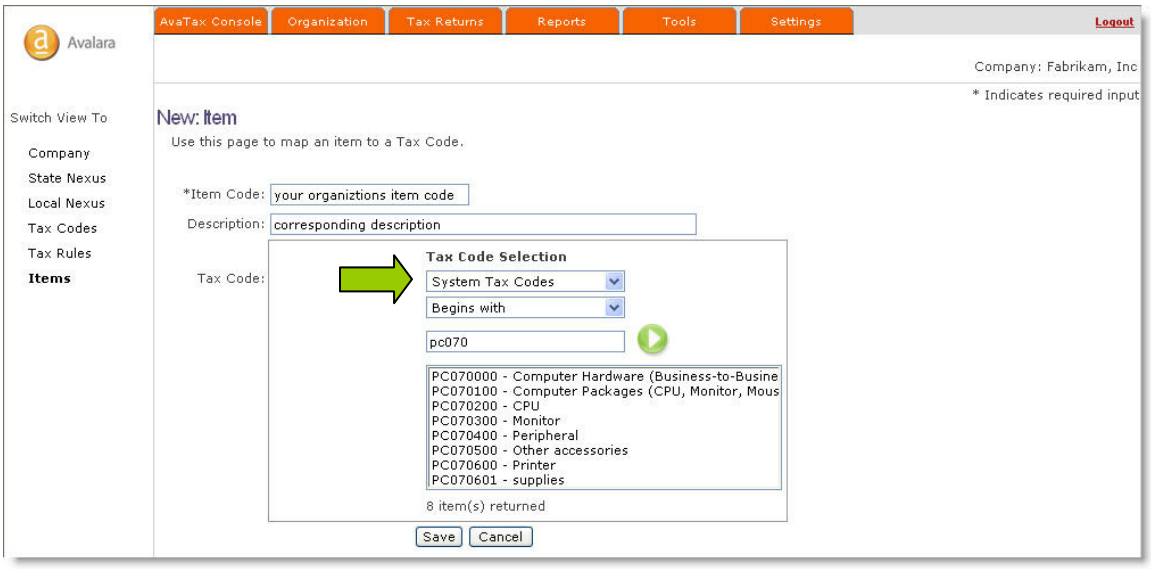
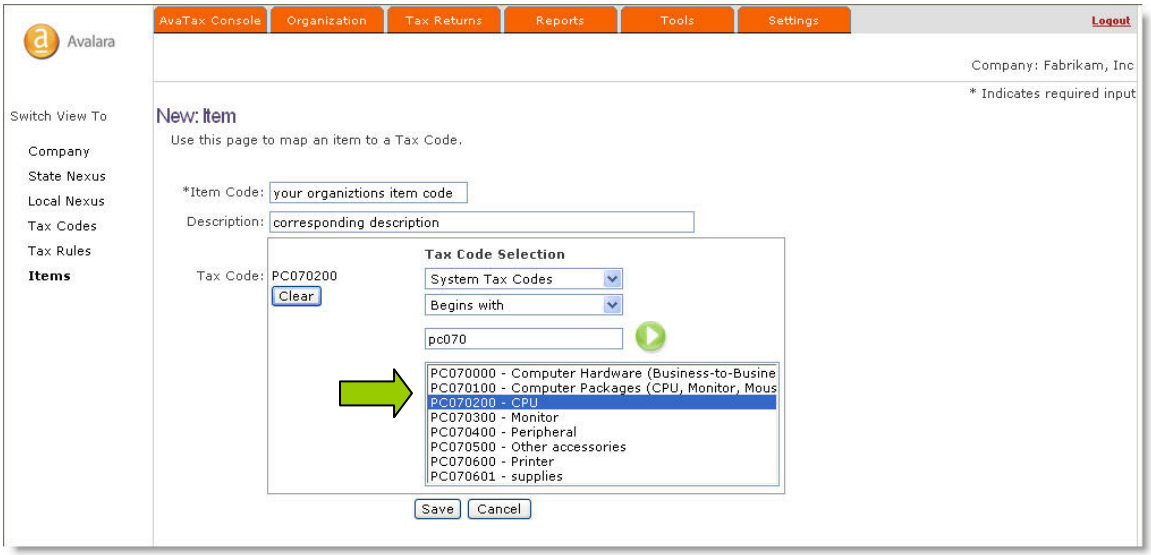
4. A list of corresponding AvaTax System Tax Codes is displayed in the window below



5. Click on the desired AvaTax Tax Code



6. Press the Save button

In order to edit an existing Item/Tax Code mapping, click on the Item Code displayed on the Items page, and make the required update utilizing the User Interface.

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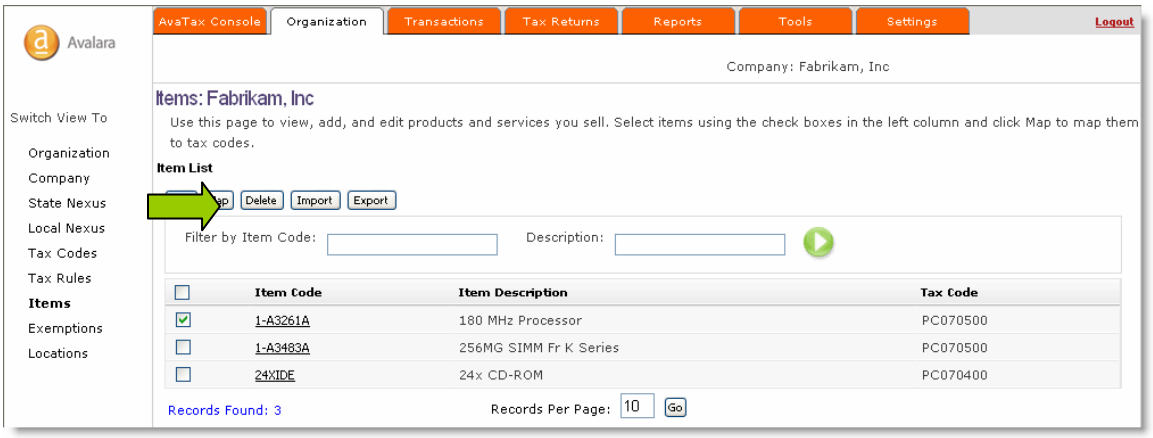
To delete an Item/Tax Code mapping, place a check in the Check Box to the left of the Item Code field, and press the Delete button displayed at the top of the screen.



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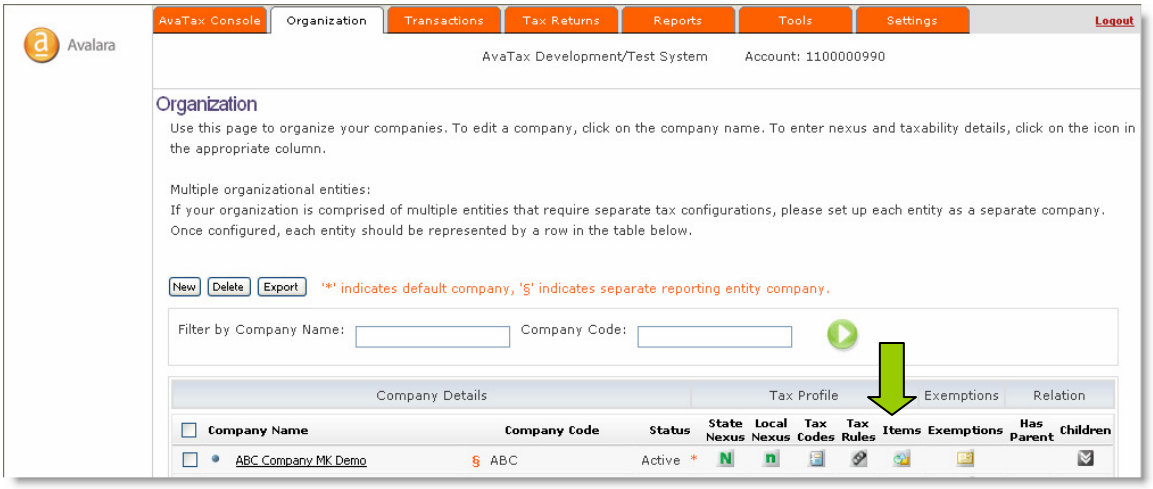
QuickBooks

Item to Tax Code mapping can be maintained on your organization's AvaTax Dashboard. On the Organization Tab of the AvaTax Dashboard, the Items button, under the Tax Profile column heading, provides access to the cross reference between Item Code and Tax Code.



There are two methods to create a cross reference between your organization's Item codes and the AvaTax System Tax Codes using the AvaTax Dashboard Items functionality. One method utilizes an Excel worksheet to upload a large number of Item/Tax Code mappings, and the second method utilizes a User Interface directly on the Dashboard to enter the Item/Tax Code record.

To record a large number of Item/Tax Code mappings, the 4.12 Release of the AvaTax service adds Import functionality to the Tools tab of the AvaTax Dashboard. End user's may now import their Item to Tax Code mapping directly from the AvaTax Dashboard utilizing either a Comma Delimited file (.csv) or a standard Excel worksheet (.xls).

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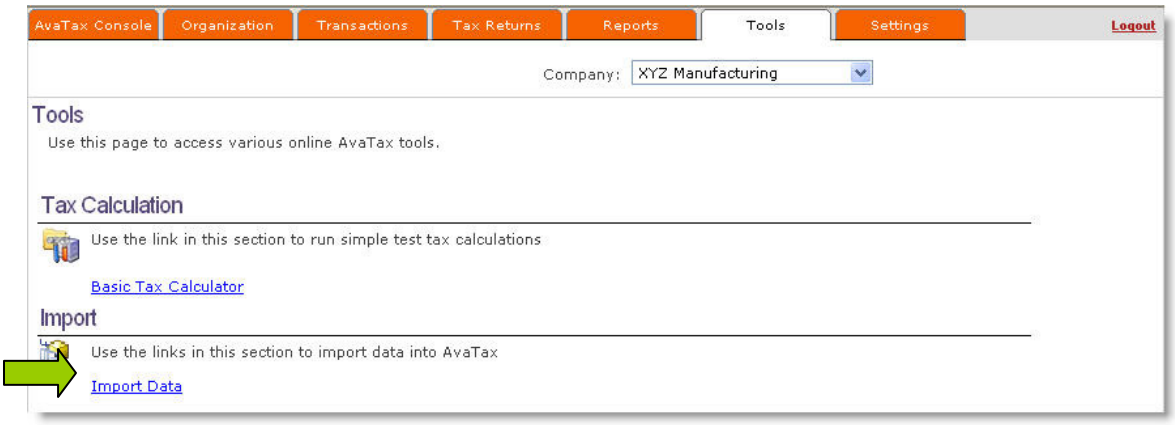
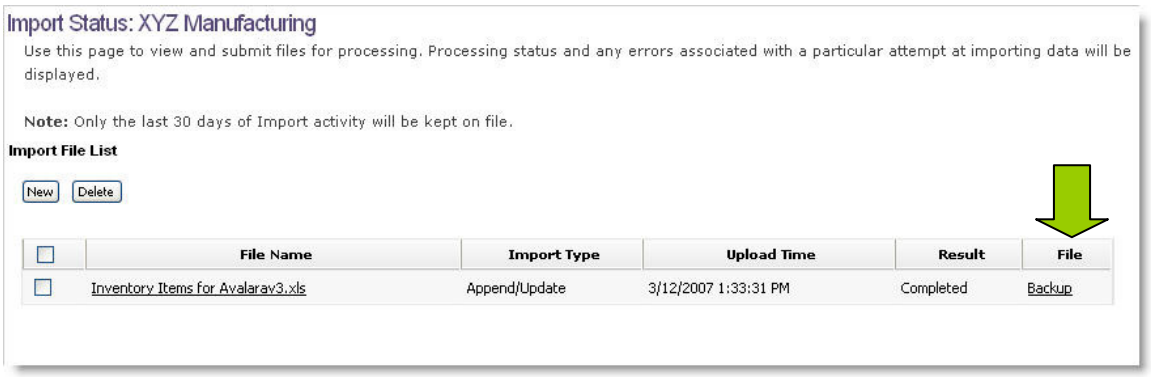
Selecting the Import Data hyper link provides access to the Import user interface.



The Import Status screen is displayed providing access to the Import File List of previous Import activity.



The Import File List identifies all file imports attempted over the course of the previous 30 days. Each successful file import creates a Comma Delimited (.csv) Backup file of the Item to Tax Code mapping prior to the successful import of the current Item mapping. Any historical Import files can be deleted from the Import File List by selecting the check box to the left of the File Name, and pressing the Delete button at the top of the list.

The Backup hyper link provides access to a downloadable file that can be imported to revert to the previous Item mapping. By clicking on the Backup hyper link, the following dialog window is displayed:

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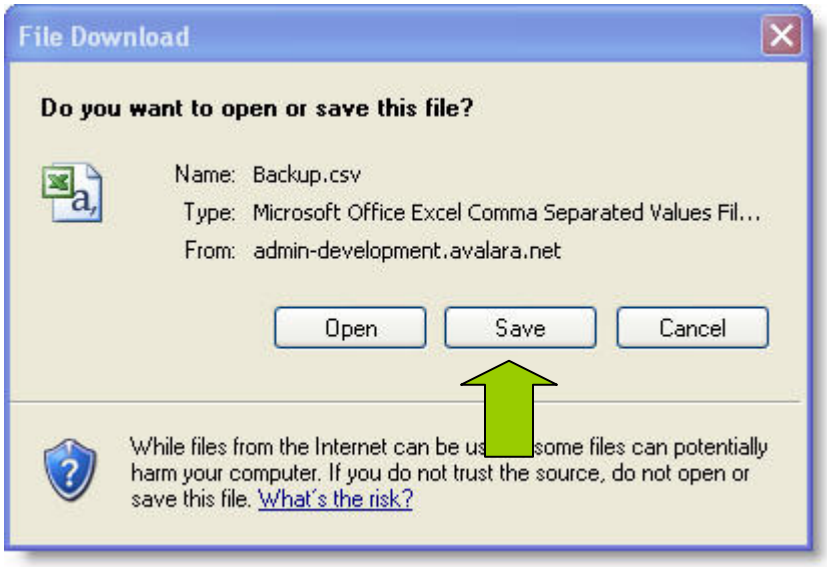

Select the Save option, and store the file locally. The process to import both new and Backup files is reviewed below.

To begin the Import process, select the New button on the top left of the Import Status screen.

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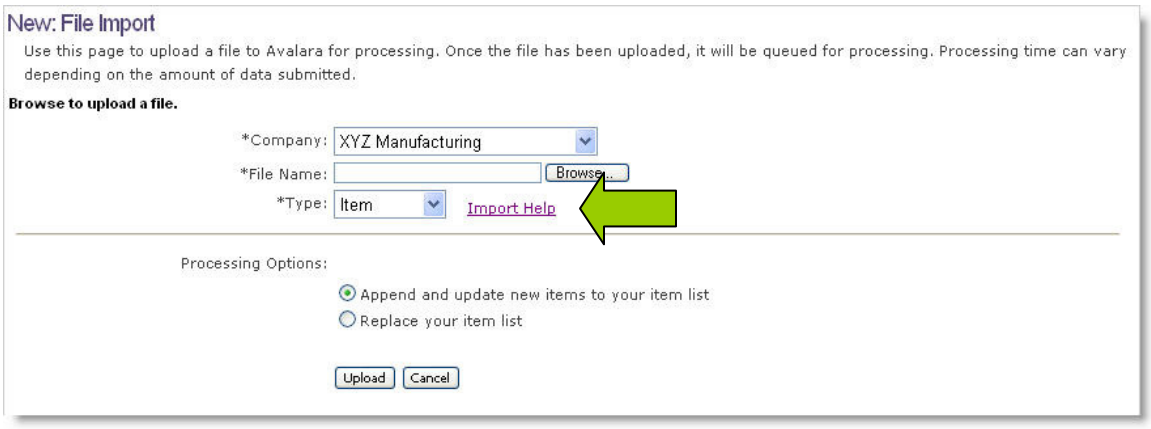
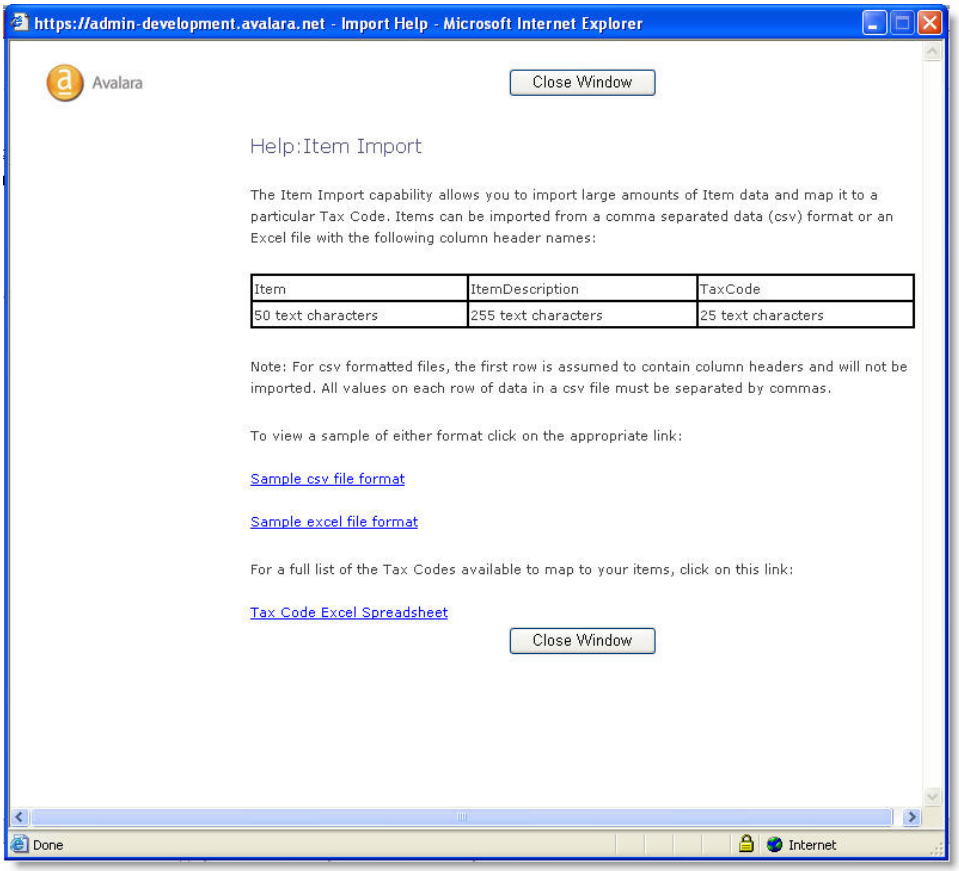
The File Import screen is displayed identifying the selection of import parameters required to begin the import process.



The Import functionality utilizes either a Comma Delimited (.csv) or Excel worksheet (.xls) file to facilitate the import of Item to Tax Code mapping. By selecting the Import Help hyper link found below the File Name Browse button, the following dialog window is displayed:



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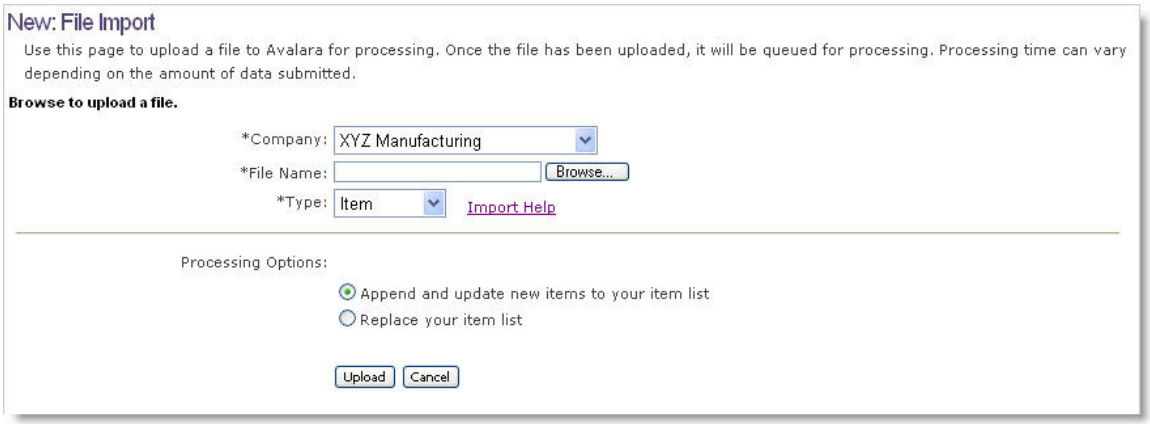
When utilizing either the Comma Delimited or standard Excel worksheet to import the Item mapping, row 1 of the file must contain the following column headings:

- Column A – Item
- Column B – ItemDescription
- Column C – TaxCode

Sample file formats can be downloaded from the Sample csv file format or the Sample excel file format hyper links on the Import Help dialog window. In addition, the Tax Code Excel Spreadsheet hyper link provides access to the AvaTax System Tax Code list.

	A	B	C
1		AvaTax System Tax Codes	
2		Note: AvaTax System Tax Codes do NOT provide taxability rules unless the AvaTax PRO product has been purchased.	
3	System Tax Code	System Tax Description	Additional System Tax Code Information
4			
5	D0000000	*Digital goods*	*Digital goods are generally viewed as downloadable items that are sold on websites or that are otherwise transferred electronically. Examples would include computer software, artwork, photographs, music, movies, zip files, e-books, PDFs and more.*
6	D9999999	Temporary Unmapped Digital Goods SKU - taxable default	A digital good that has not been mapped to a specific digital good tax code. This temporary unmapped code has a taxable default and will impose tax in all cases unless an entity or use base exemption is applicable. The purpose for using this code is limited to getting a SKU assigned to a system tax code until it can be adequately reviewed and a specific tax code can be accurately assigned.
7	DA010000	Advertising material (Digital Only -- No Physical Media)	Tangible personal property (i.e. designs, artwork, photos etc.) associated with advertising services that is transferred to the customer through electronic means only.
8	DA030000	Art (Digital Only -- No Physical Media)	Canned artwork that is transferred to the customer through electronic means.
9	DA040000	Audio (Digital Only -- No Physical Media)	Audio (i.e. music or spoken word) that is transferred to the customer through electronic means only.

Upon preparing the import file in either accepted format, return to the File Import screen:



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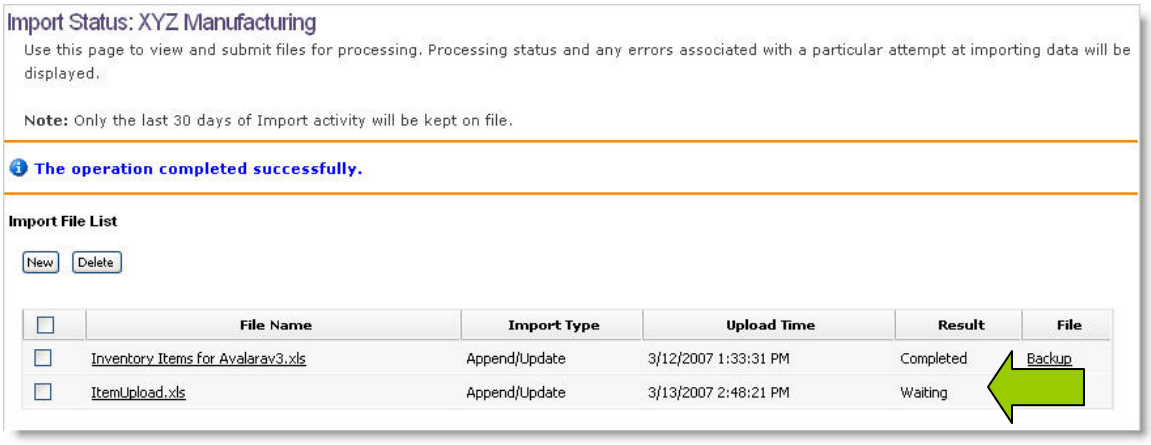
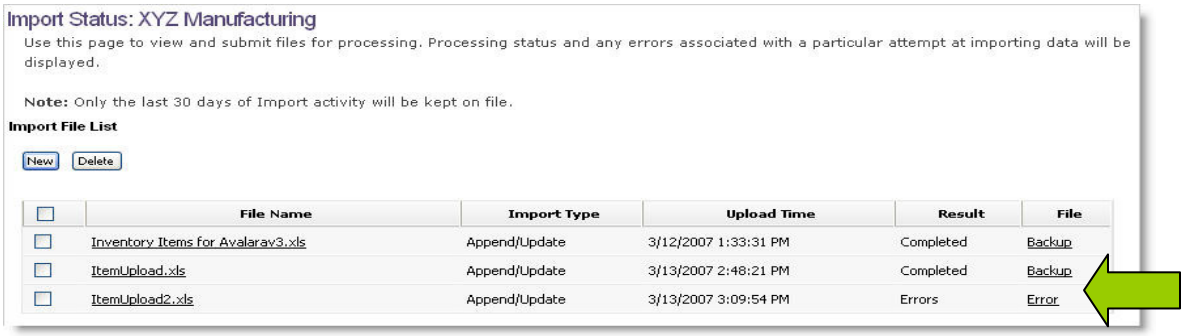
1. Select the desired Company from the Company drop down menu
2. Utilizing the Browse button, select the desired Import file
3. Identify the desired Processing Option:
    a. Append and update new items to your item list
    b. Replace your item list
4. Press the Upload button

The Import Status screen is returned, and the Item to Tax Code mapping worksheet is queued for processing. The initial Result returned is Waiting.



Upon successful completion of the import, the Result field updates to a status of Completed, and the File field is populated with a hyper link named Backup that provides access to a Comma Delimited file containing copy of the Item list contained in the AvaTax Dashboard prior to the import of the current Item update.

If an error is found in the Item import file, the entire import is aborted and a Result of Errors is displayed. The File field is populated with a hyper link named Error that provides access to an Excel worksheet identifying the specific



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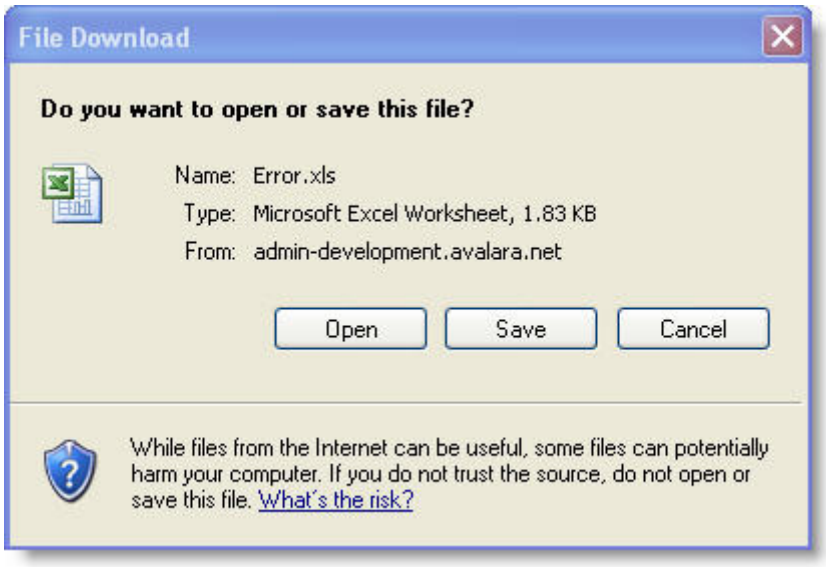
error(s) causing the import failure. Clicking on the Error hyper link calls the following dialog window:



Pressing the Open button displays the Excel worksheet identifying the lines causing the error.

	A	B	C	D
1	Item	ItemDescription	TaxCode	Errors
2		Application Software - delivered on CD	DC010400	ItemCode Missing --
3	SW-001-54351		DC010500	ItemDescription Missing --
4	HW-015-75001	7500 series Desktop Hardware - CPU		TaxCode Missing --
5				

Edit the original Item import file, repair the lines causing the error, and repeat the Import Process.

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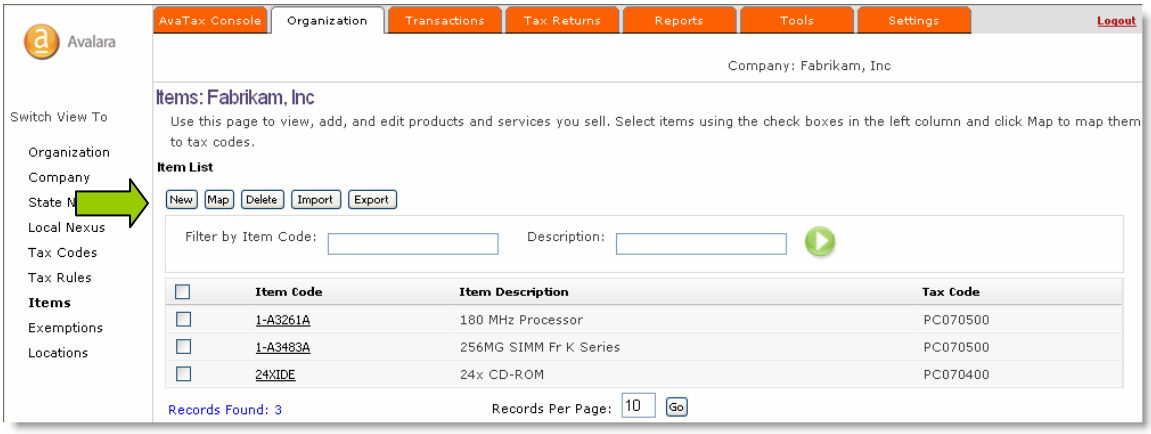
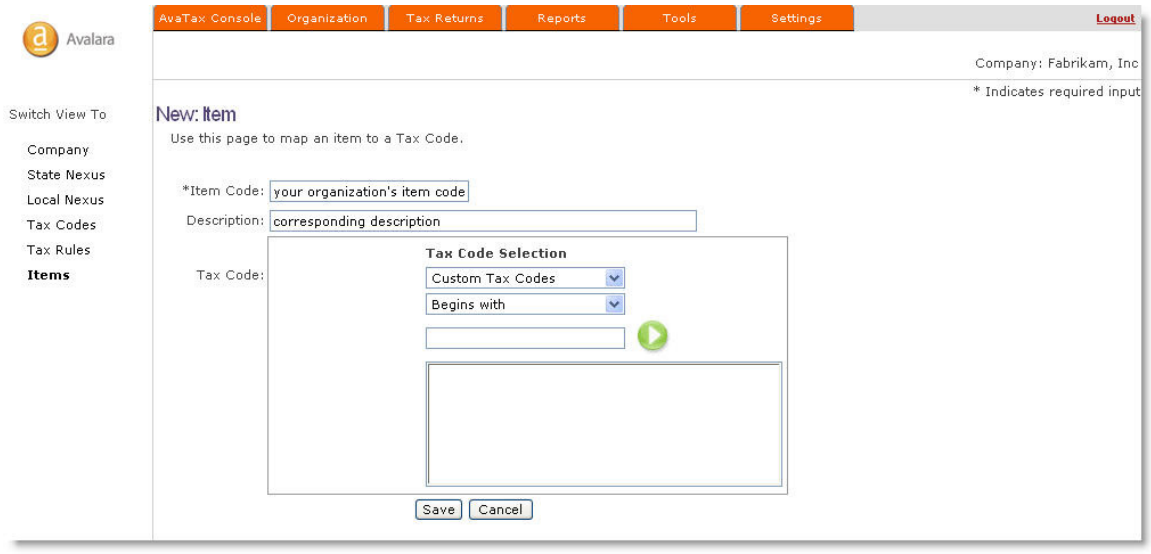
The AvaTax Dashboard provides a User Interface to manually add Item/Tax Code mappings or edit existing Item/Tax Code Mappings. After accessing the AvaTax Dashboard Items screen, a complete listing of the current Item mappings is displayed.



To manually add an Item Mapping record, press the New button. A separate screen is displayed provide the User Interface to add Item/Tax Code mappings.



On the Window identified as Tax Code:

1. Change the Tax Code Selection drop down list from Custom Tax Codes, TO *System Tax Codes*
2. Record the first characters of the AvaTax System Tax Code in the field below the *Begins with* drop down menu
3. Press the green refresh button

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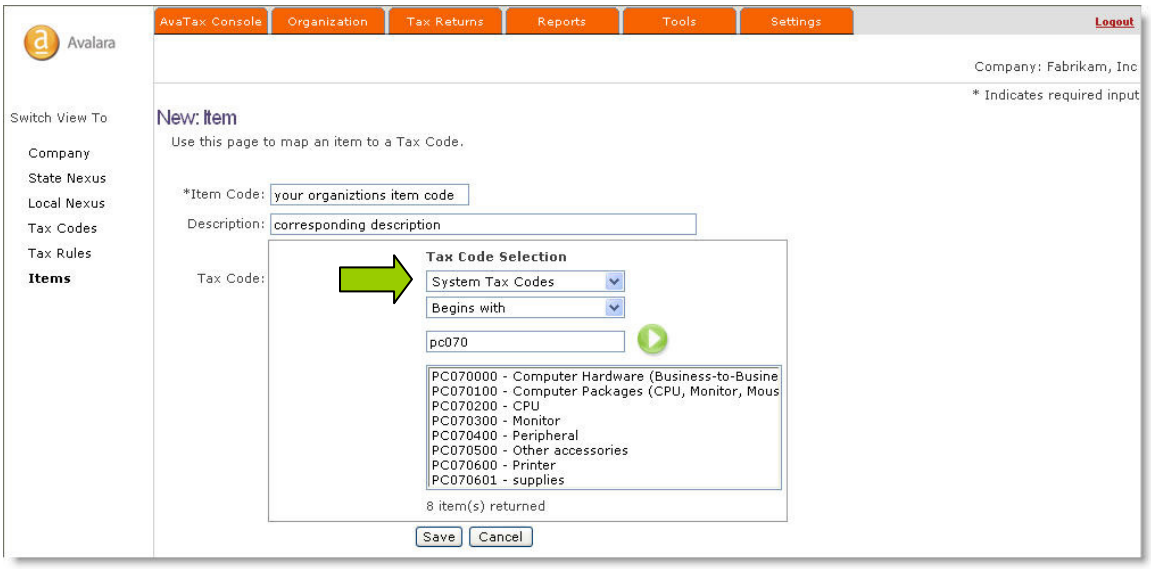
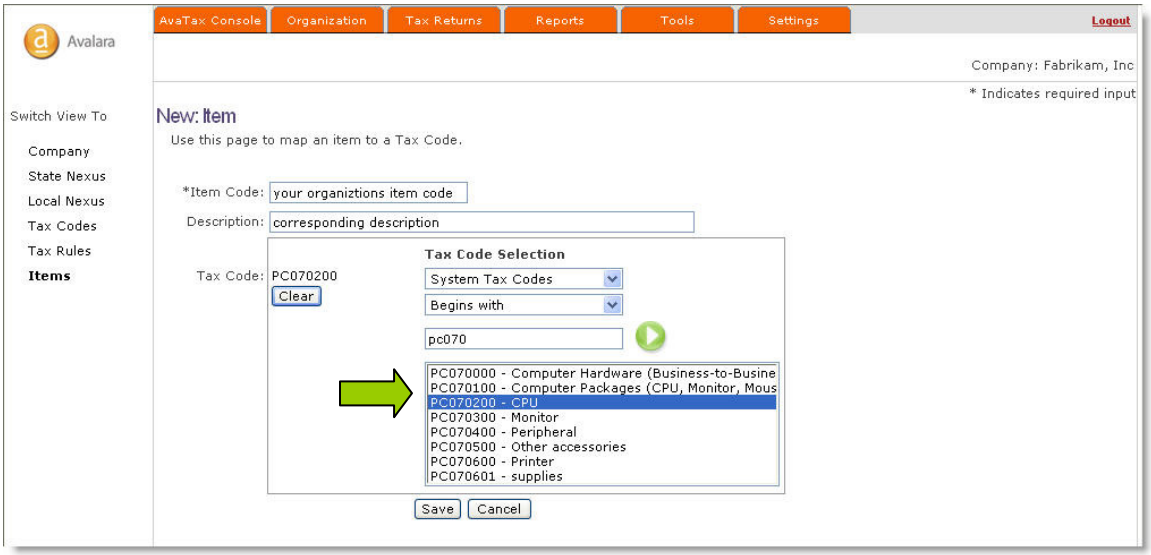
4. A list of corresponding AvaTax System Tax Codes is displayed in the window below



5. Click on the desired AvaTax Tax Code



6. Press the Save button

In order to edit an existing Item/Tax Code mapping, click on the Item Code displayed on the Items page, and make the required update utilizing the User Interface.

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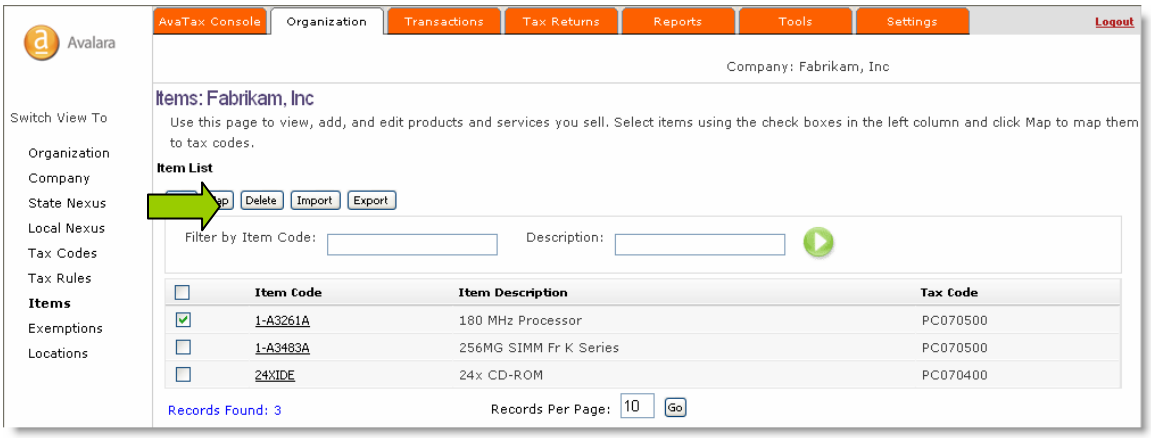
To delete an Item/Tax Code mapping, place a check in the Check Box to the left of the Item Code field, and press the Delete button displayed at the top of the screen.



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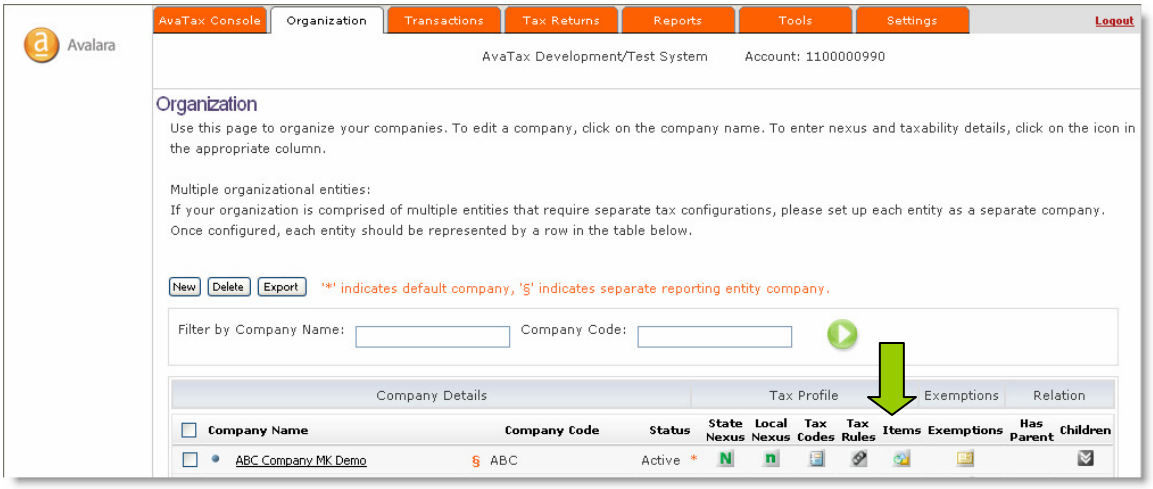
Other – Software Development Kit (SDK)

Item to Tax Code mapping can be maintained on your organization's AvaTax Dashboard. On the Organization Tab of the AvaTax Dashboard, the Items button, under the Tax Profile column heading, provides access to the cross reference between Item Code and Tax Code.



There are two methods to create a cross reference between your organization's Item codes and the AvaTax System Tax Codes using the AvaTax Dashboard Items functionality. One method utilizes an Excel worksheet to upload a large number of Item/Tax Code mappings, and the second method utilizes a User Interface directly on the Dashboard to enter the Item/Tax Code record.

To record a large number of Item/Tax Code mappings, the 4.12 Release of the AvaTax service adds Import functionality to the Tools tab of the AvaTax Dashboard. End user's may now import their Item to Tax Code mapping directly from the AvaTax Dashboard utilizing either a Comma Delimited file (.csv) or a standard Excel worksheet (.xls).

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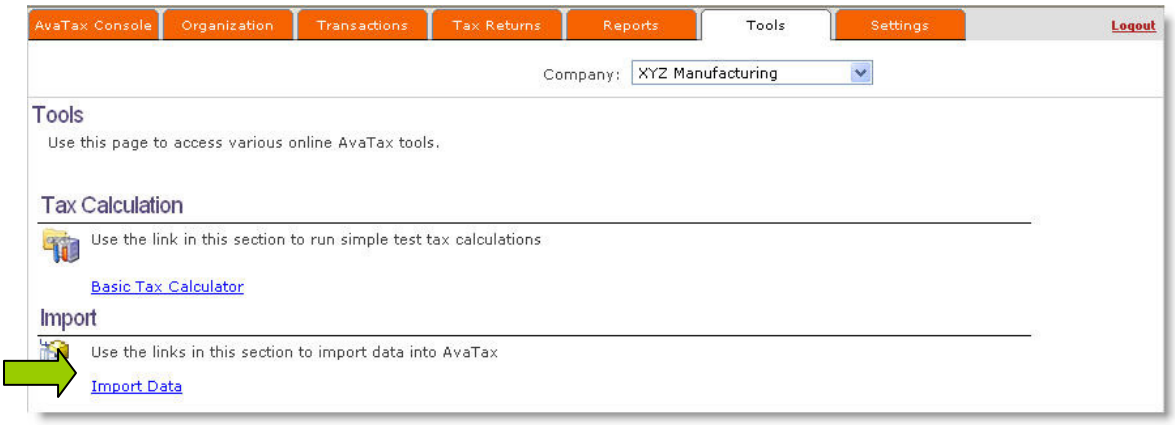
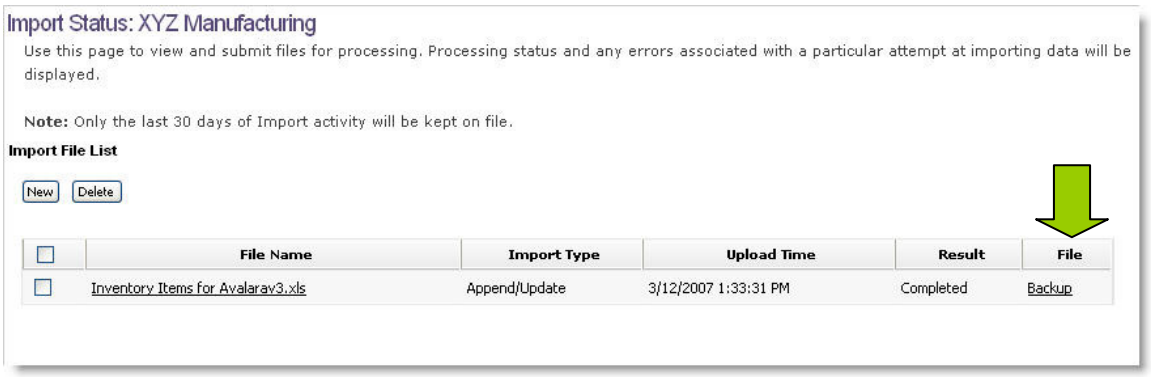
Selecting the Import Data hyper link provides access to the Import user interface.



The Import Status screen is displayed providing access to the Import File List of previous Import activity.



The Import File List identifies all file imports attempted over the course of the previous 30 days. Each successful file import creates a Comma Delimited (.csv) Backup file of the Item to Tax Code mapping prior to the successful import of the current Item mapping. Any historical Import files can be deleted from the Import File List by selecting the check box to the left of the File Name, and pressing the Delete button at the top of the list.

The Backup hyper link provides access to a downloadable file that can be imported to revert to the previous Item mapping. By clicking on the Backup hyper link, the following dialog window is displayed:

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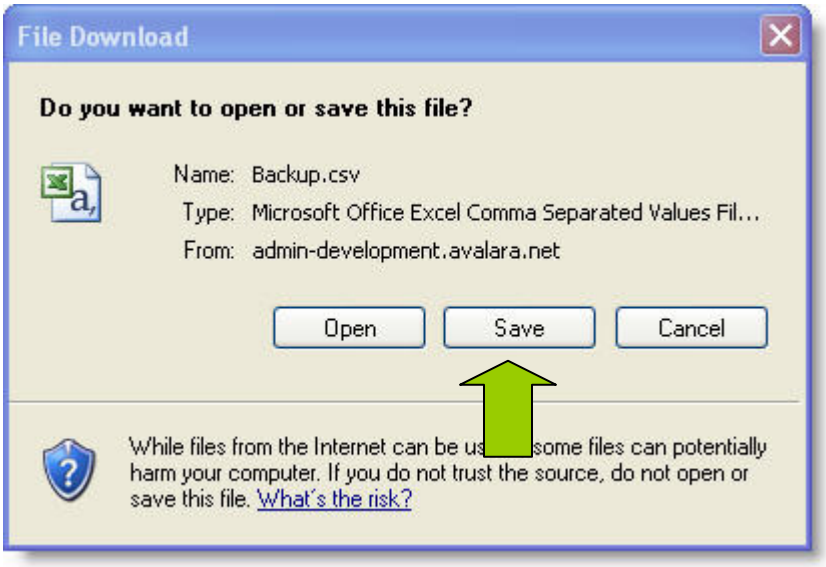

Select the Save option, and store the file locally. The process to import both new and Backup files is reviewed below.

To begin the Import process, select the New button on the top left of the Import Status screen.

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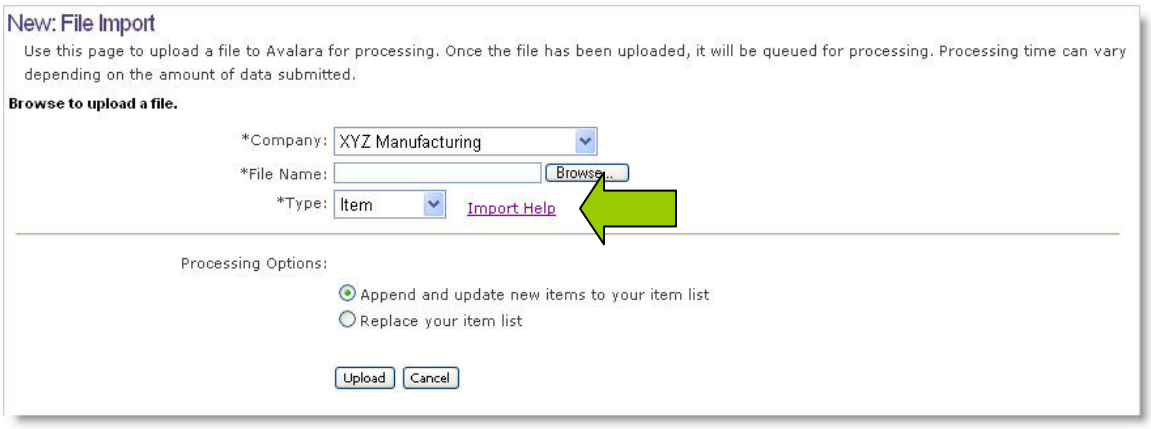
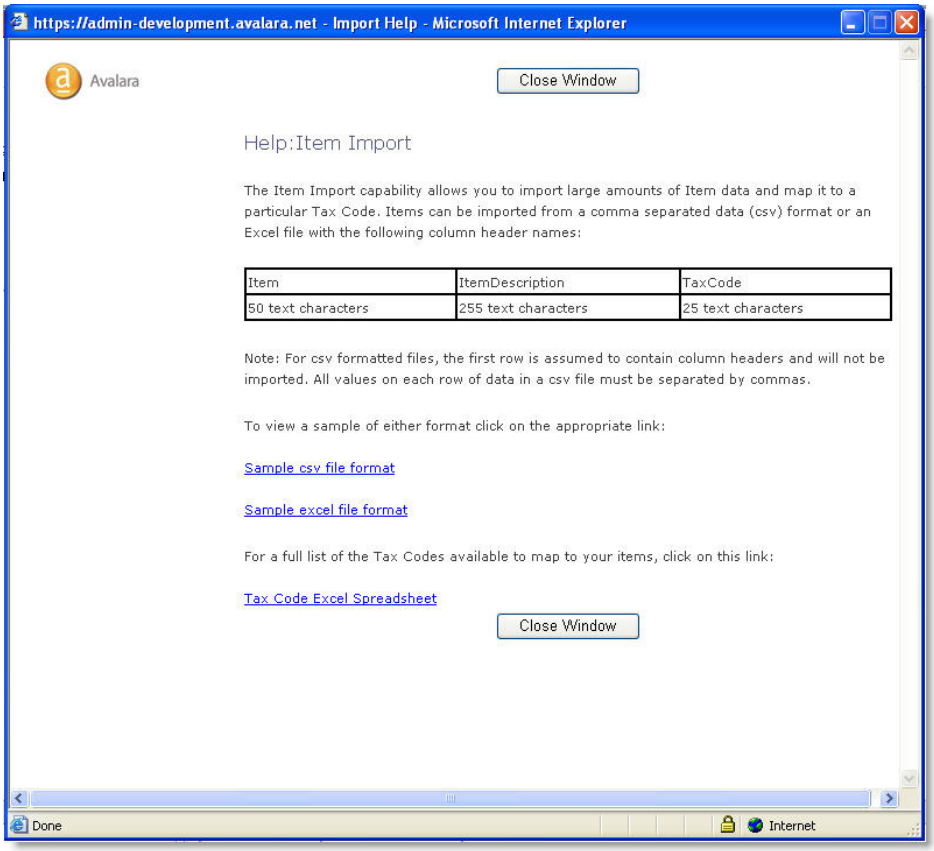
The File Import screen is displayed identifying the selection of import parameters required to begin the import process.



The Import functionality utilizes either a Comma Delimited (.csv) or Excel worksheet (.xls) file to facilitate the import of Item to Tax Code mapping. By selecting the Import Help hyper link found below the File Name Browse button, the following dialog window is displayed:



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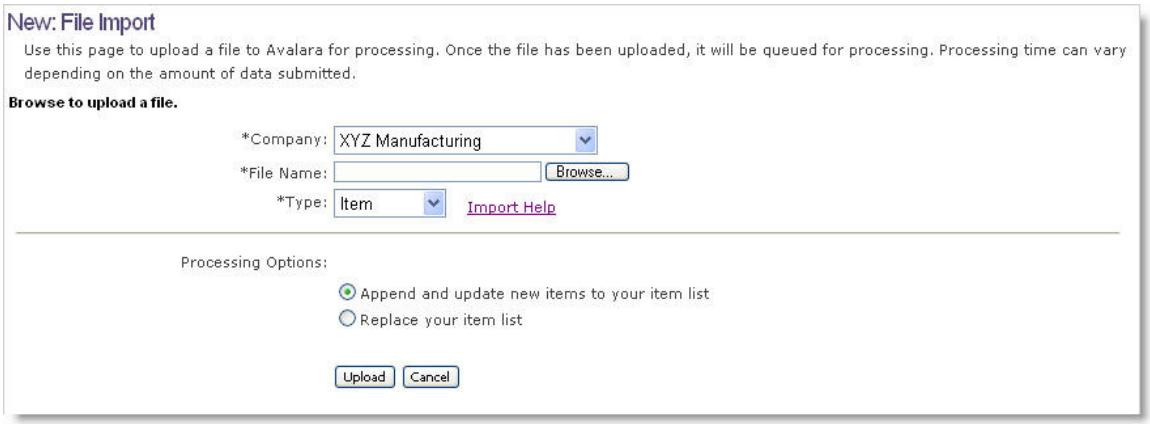
When utilizing either the Comma Delimited or standard Excel worksheet to import the Item mapping, row 1 of the file must contain the following column headings:

- Column A – Item
- Column B – ItemDescription
- Column C – TaxCode

Sample file formats can be downloaded from the Sample csv file format or the Sample excel file format hyper links on the Import Help dialog window. In addition, the Tax Code Excel Spreadsheet hyper link provides access to the AvaTax System Tax Code list.

	A	B	C
1		AvaTax System Tax Codes	
2		Note: AvaTax System Tax Codes do NOT provide taxability rules unless the AvaTax PRO product has been purchased.	
3	System Tax Code	System Tax Description	Additional System Tax Code Information
4			
5	D0000000	*Digital goods*	*Digital goods are generally viewed as downloadable items that are sold on websites or that are otherwise transferred electronically. Examples would include computer software, artwork, photographs, music, movies, zip files, e-books, PDFs and more.*
6	D9999999	Temporary Unmapped Digital Goods SKU - taxable default	A digital good that has not been mapped to a specific digital good tax code. This temporary unmapped code has a taxable default and will impose tax in all cases unless an entity or use base exemption is applicable. The purpose for using this code is limited to getting a SKU assigned to a system tax code until it can be adequately reviewed and a specific tax code can be accurately assigned.
7	DA010000	Advertising material (Digital Only -- No Physical Media)	Tangible personal property (i.e. designs, artwork, photos etc.) associated with advertising services that is transferred to the customer through electronic means only.
8	DA030000	Art (Digital Only -- No Physical Media)	Canned artwork that is transferred to the customer through electronic means.
9	DA040000	Audio (Digital Only -- No Physical Media)	Audio (i.e. music or spoken word) that is transferred to the customer through electronic means only.

Upon preparing the import file in either accepted format, return to the File Import screen:



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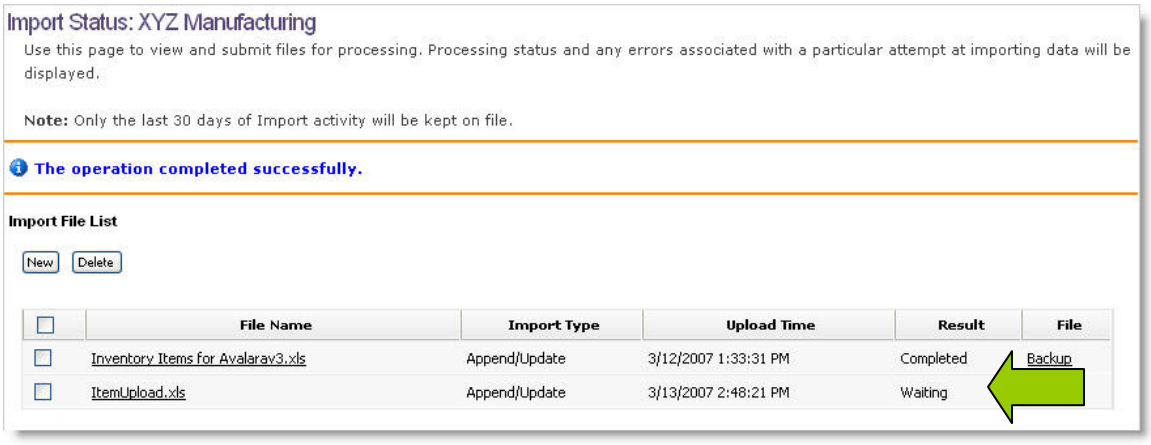
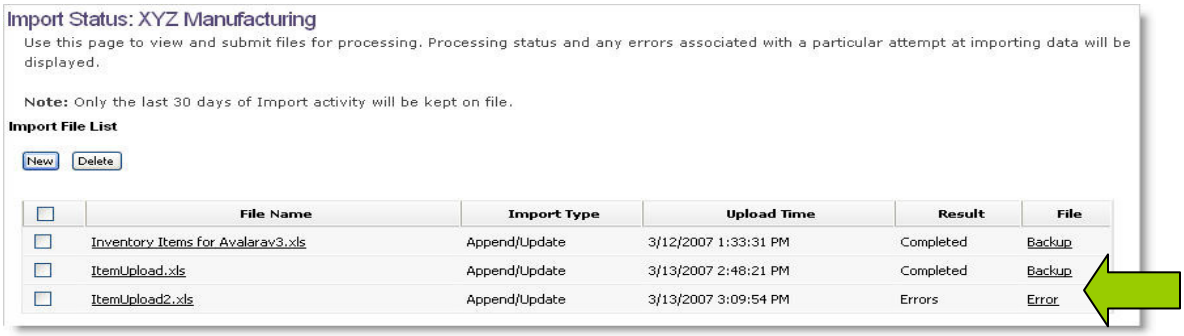
1. Select the desired Company from the Company drop down menu
2. Utilizing the Browse button, select the desired Import file
3. Identify the desired Processing Option:
    a. Append and update new items to your item list
    b. Replace your item list
4. Press the Upload button

The Import Status screen is returned, and the Item to Tax Code mapping worksheet is queued for processing. The initial Result returned is Waiting.



Upon successful completion of the import, the Result field updates to a status of Completed, and the File field is populated with a hyper link named Backup that provides access to a Comma Delimited file containing copy of the Item list contained in the AvaTax Dashboard prior to the import of the current Item update.

If an error is found in the Item import file, the entire import is aborted and a Result of Errors is displayed. The File field is populated with a hyper link named Error that provides access to an Excel worksheet identifying the specific



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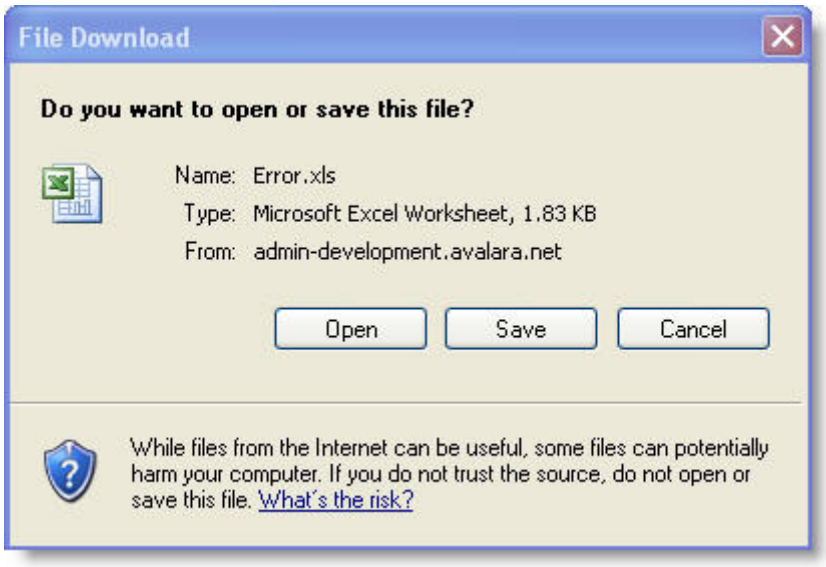
error(s) causing the import failure. Clicking on the Error hyper link calls the following dialog window:



Pressing the Open button displays the Excel worksheet identifying the lines causing the error.

	A	B	C	D
1	Item	ItemDescription	TaxCode	Errors
2		Application Software - delivered on CD	DC010400	ItemCode Missing --
3	SW-001-54351		DC010500	ItemDescription Missing --
4	HW-015-75001	7500 series Desktop Hardware - CPU		TaxCode Missing --
5				

Edit the original Item import file, repair the lines causing the error, and repeat the Import Process.

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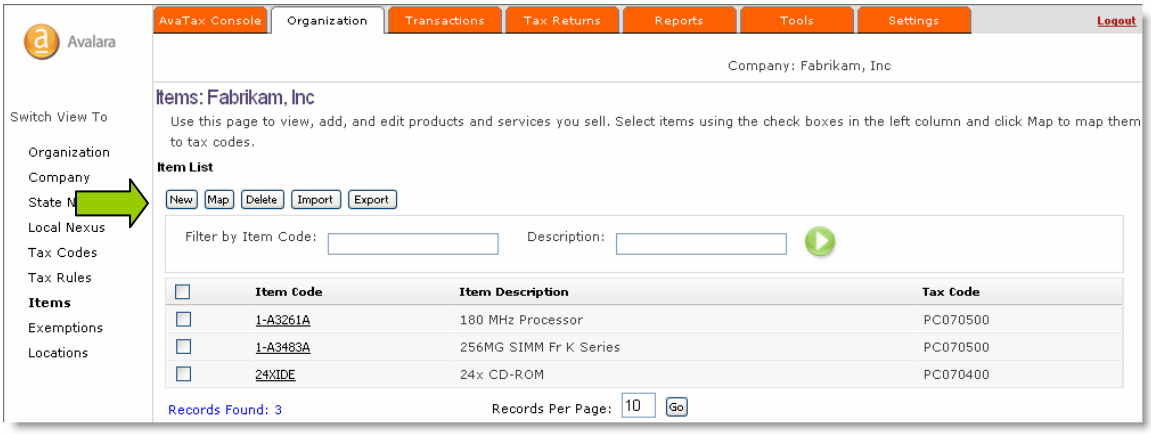
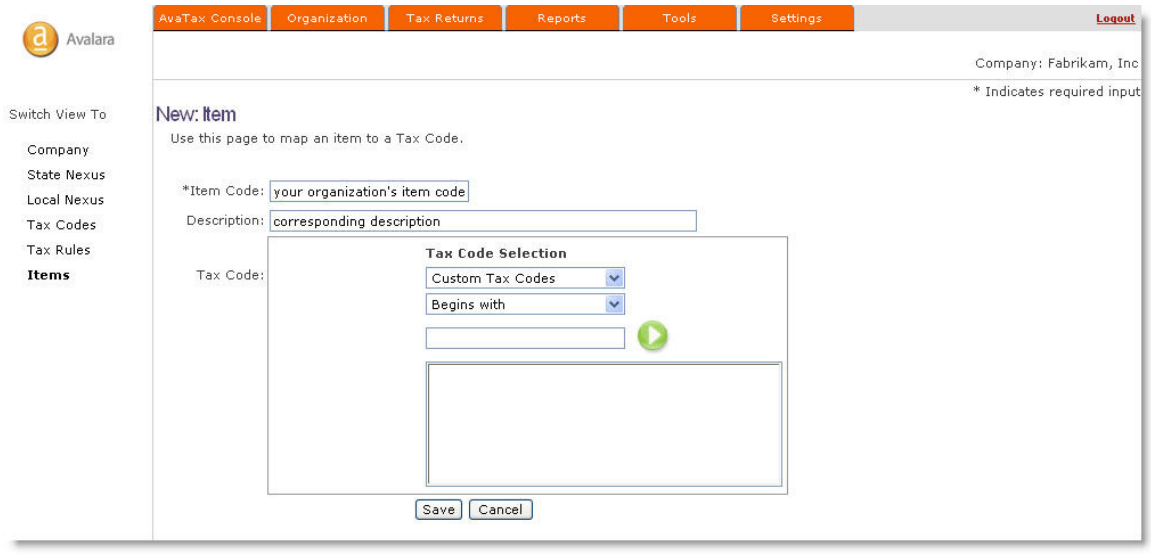
The AvaTax Dashboard provides a User Interface to manually add Item/Tax Code mappings or edit existing Item/Tax Code Mappings. After accessing the AvaTax Dashboard Items screen, a complete listing of the current Item mappings is displayed.



To manually add an Item Mapping record, press the New button. A separate screen is displayed provide the User Interface to add Item/Tax Code mappings.



On the Window identified as Tax Code:

1. Change the Tax Code Selection drop down list from Custom Tax Codes, TO *System Tax Codes*
2. Record the first characters of the AvaTax System Tax Code in the field below the *Begins with* drop down menu
3. Press the green refresh button

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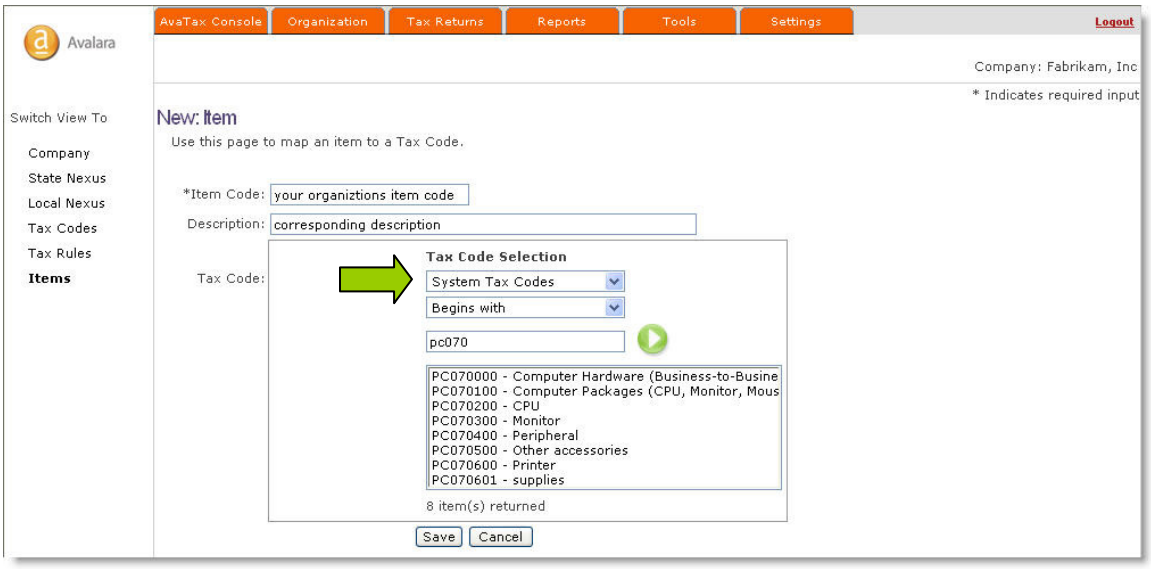
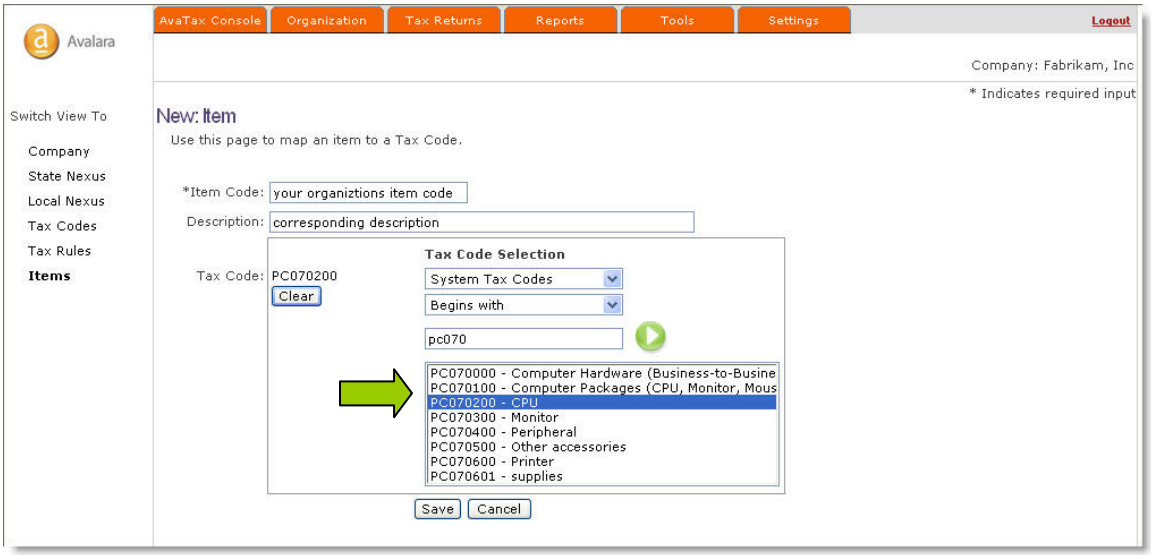
4. A list of corresponding AvaTax System Tax Codes is displayed in the window below



5. Click on the desired AvaTax Tax Code



6. Press the Save button

In order to edit an existing Item/Tax Code mapping, click on the Item Code displayed on the Items page, and make the required update utilizing the User Interface.

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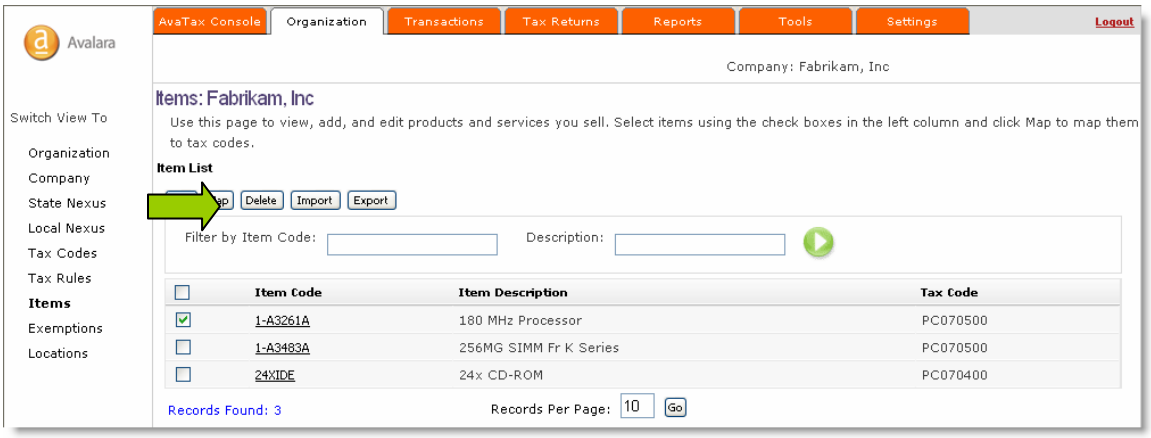
To delete an Item/Tax Code mapping, place a check in the Check Box to the left of the Item Code field, and press the Delete button displayed at the top of the screen.



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