



Avalara
CRUSH



Maximizing Avalara integrations to automate end-to-end compliance

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Disclaimer

While we hope you'll find this discussion helpful, this session is for informational purposes only and is not legal or tax advice.





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India Anderson

Director of Product Management



Angela Goldsmith

Senior Manager of Product
Management for Integrations

Agenda

- 1 Connector simplification –
new configuration experience
- 2 New integrations across
Avalara-built connectors
- 3 Connecting your business systems
with a single source of truth for
compliance data



POLL QUESTION 1





Connector simplification

Connector simplification

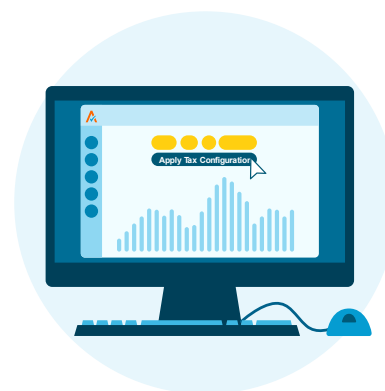
Improving the connector configuration experience



Centralized location
for settings and
configurations of
Avalara products
and connectors



Greater clarity
on features and
functionality



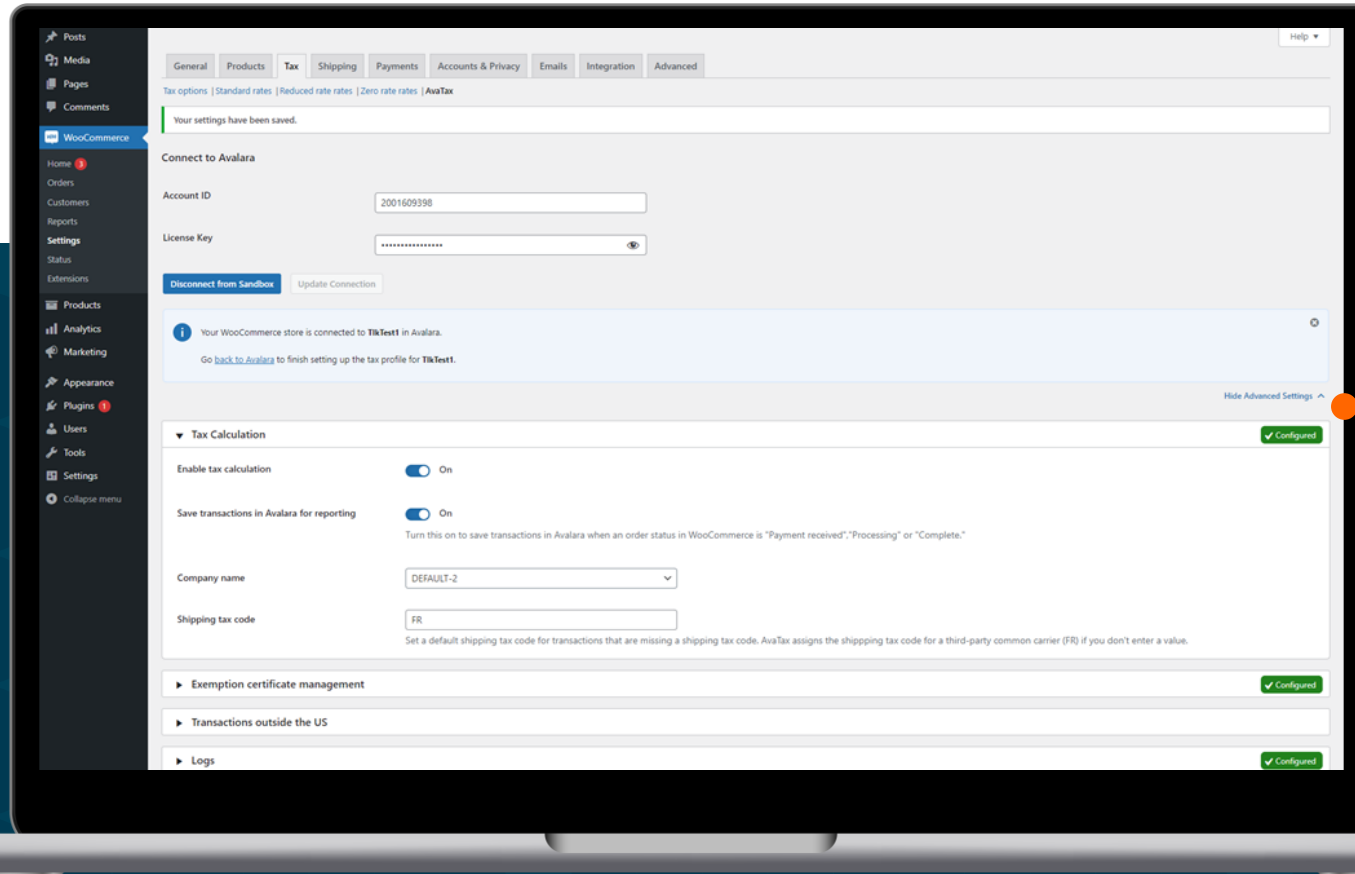
Continuity in
the configuration
settings across
Avalara-built
connectors



Reduce
implementation time
of new integrations,
speeding up your
time to value

Connector simplification

Configuration experience



Simplified configuration
experience

Connector simplification

Improving the post-installation experience

Adjust and enhance your connector

Adjust your configurations and enable new capabilities with greater ease

Streamlined customer support

With settings migrated to the Avalara Portal, support teams gain visibility into your configurations to help more quickly resolve a problem if one arises





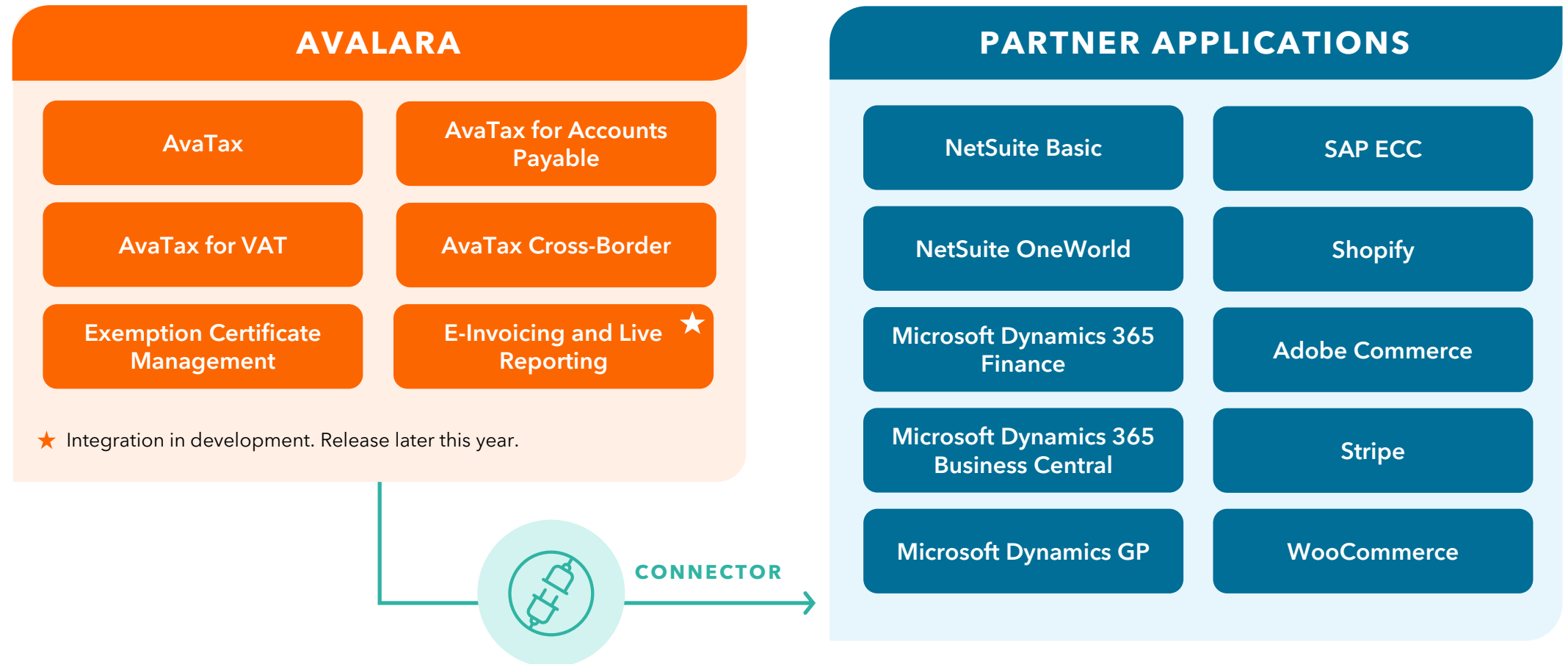
New integrations
across Avalara-built
connectors

POLL QUESTION 2



Integrate end-to-end global compliance solutions

Enhanced functionality across top connectors



Avalara Exemption Certificate Management

Automate the management of exemption certificates

Customer Account	Certificate ID	Certificate Status	Exemption Reason	Expiry Date	No. of Pages	Address	Certificate Usage	Review Status
ECM Testing	302	COMPLETE	AGRICULTURE	9/18/2028	0	900 Winslow Way E, Bainbridge Island, WA, 98110-2450, US	BLANKET	PENDING

Note : Expiry date will be blank for certificates whose date is higher than max date supported by D365FO. E.g., 31-12-9999



Reduce risk

Improve certificate accuracy with automated validation and proactive renewal.



Drive efficiency

Streamline and automate certificate collection, review, management, tax law tracking, and expiry date monitoring.

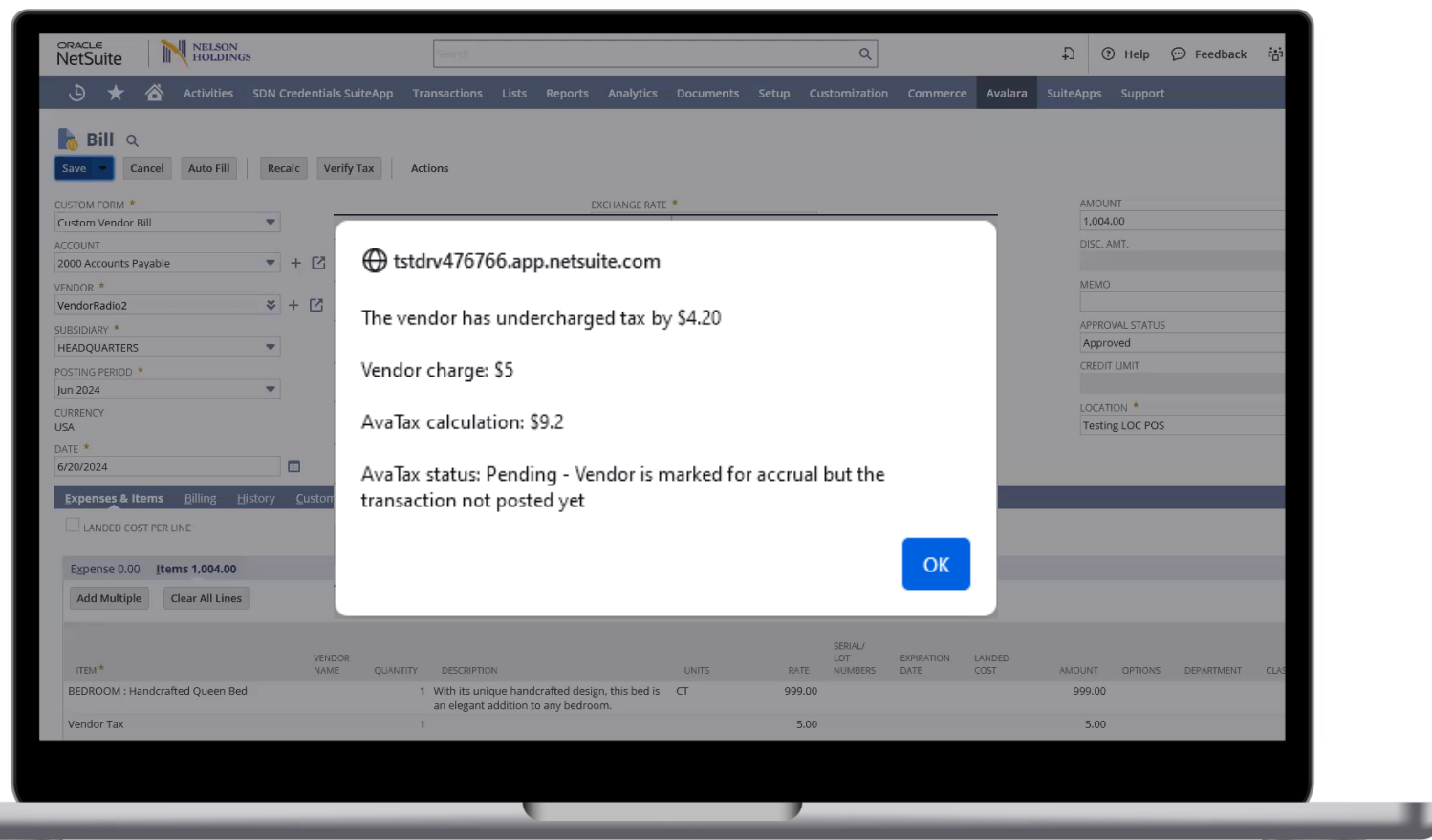


Improve customer satisfaction

Minimize credits/rebills, delays, and supply chain issues due to missing certificates.

Avalara AvaTax for Accounts Payable

Automate the complex, tedious tasks of managing use tax



More accurate compliance

Identify and correct overcharged and undercharged vendor tax.



Centralized configuration

Provides a single location in which to view, act, and report on transactions flowing through the system.



Ease of connection

Seamlessly works with your business applications, including other Avalara solutions.

Avalara AvaTax Cross-Border

Lower costs and grow revenue while maintaining control of your customers' cross-border experience

Checkout

Customer

Customer Information:
john.smith@avalara.com

Shipping

Shipping Address:
John Smith
900 Winslow Way E
Bainbridge Island WA 98110-2450
3333333333

Shipping Method:
Ground (7-10 Business Days)..... \$15.99

Payment


Need Help? Call 1-800-555-0199

Order Summary

Subtotal \$2,074.98
Shipping \$65.99
Sales Tax \$304.87
Import Duty/Fees \$107.90
Total \$2,445.84

2 Items \$2,074.98

Vizio VP504 50" Plasma High Definition Television



Extended Warranty: None
Pre-Order
Mon Jun 01 2009

Each	Quantity	Total
------	----------	-------



Drive scalable and more accurate calculations

Simplify your compliance process with a flexible, unified platform to help calculate or estimate customs and duties upfront with greater accuracy.



Classify harmonized system codes with confidence

Automate the assignment of HS codes with a solution that can be implemented on its own and seamlessly integrated with AvaTax Cross-Border.

Avalara AvaTax (VAT determination)

More accurately calculate VAT/GST based on regularly updated tax data

CONTACT [Change](#)
gsurbhi90@gmail.com

SHIP TO [Change](#)
Surbhi Gupta
422 Yale Ave N, Apt 423 , 8000
Switzerland, Switzerland

DELIVERY METHOD ⓘ

- ☒ Arrives by Friday, June 16
International Standard Free
- ☐ Arrives by Thursday, June 8
International Express CHF 19.00


DUTIES

- ☒ Pay duties now CHF 0.04
No additional fees on delivery

Enter Gift Card >

Enter Discount Code >

Subtotal	CHF 332.00
Shipping	Free
Duties ⓘ	CHF 0.04
Taxes	CHF 25.56
Total	CHF CHF 357.60

 1 Gracelynn Mirrored Cut Out
Maxi Dress - Black/Black
Size: L CHF 332.00

Continue to payment



Reduce risk

Reduce your audit risk with more accurate VAT/GST calculation.



Drive efficiencies

Simplify tax research and maintenance with automated technology freeing up valuable resources.



Avalara Advantage

End-to-end tax compliance suite for international tax compliance needs, delivering cost-savings and convenience with a single vendor contract.



Connecting your
business systems
with a single source
of truth for
compliance data

POLL QUESTION 3



Connect multiple business systems

Single source of truth for compliance data



VALUE OF INTEGRATING MULTIPLE SYSTEMS

Sync product information across systems

Establish a single source of truth for compliance data

Eliminate recalculation and duplicate transactions across multiple systems

Track liabilities in all systems

Apply consistent tax rates for reconciliation

Track economic nexus impacted by taxable and exempt sales

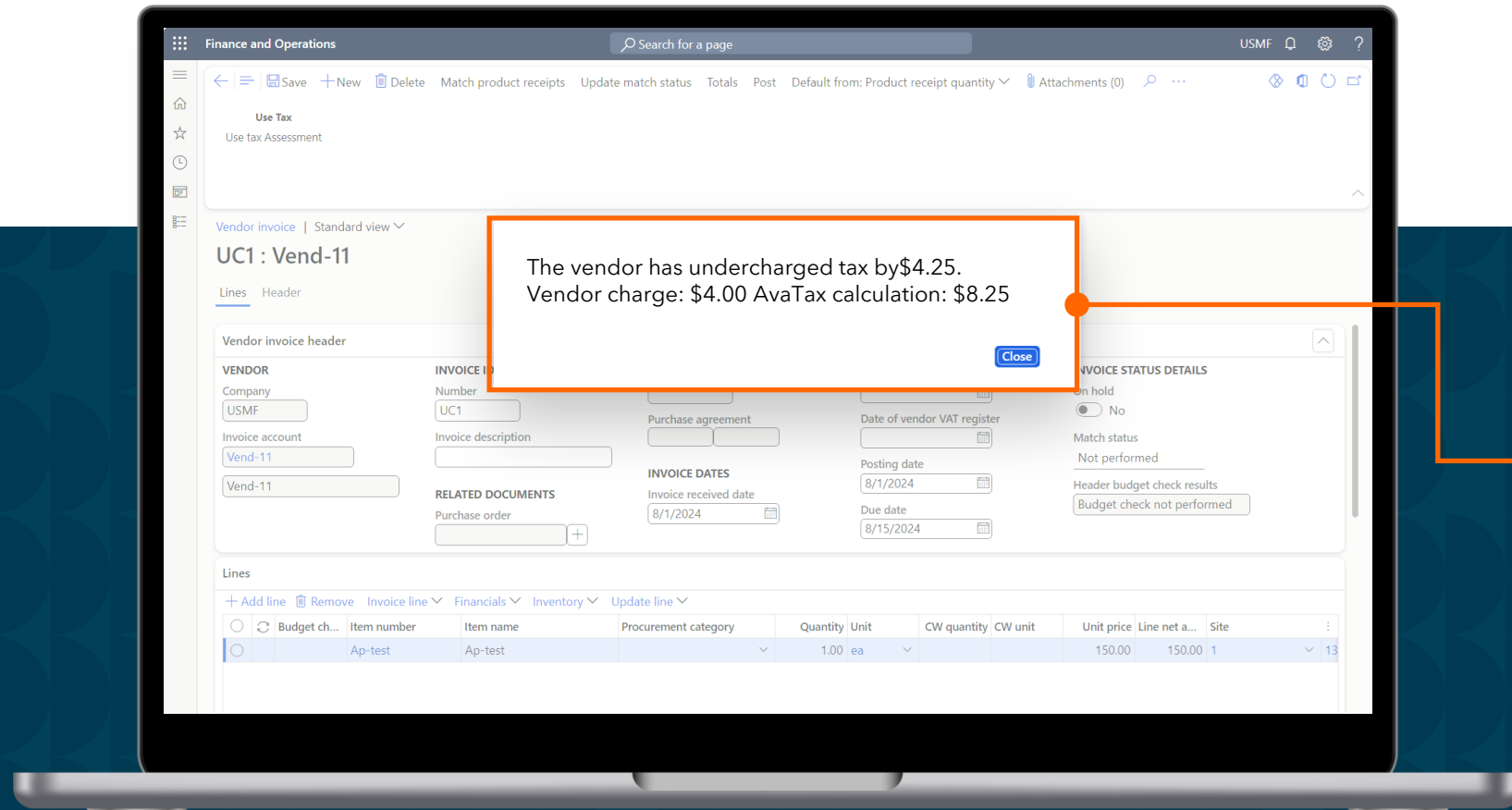
Enable automation of returns filing and remittance

Flexible configuration based on your order-to-cash process



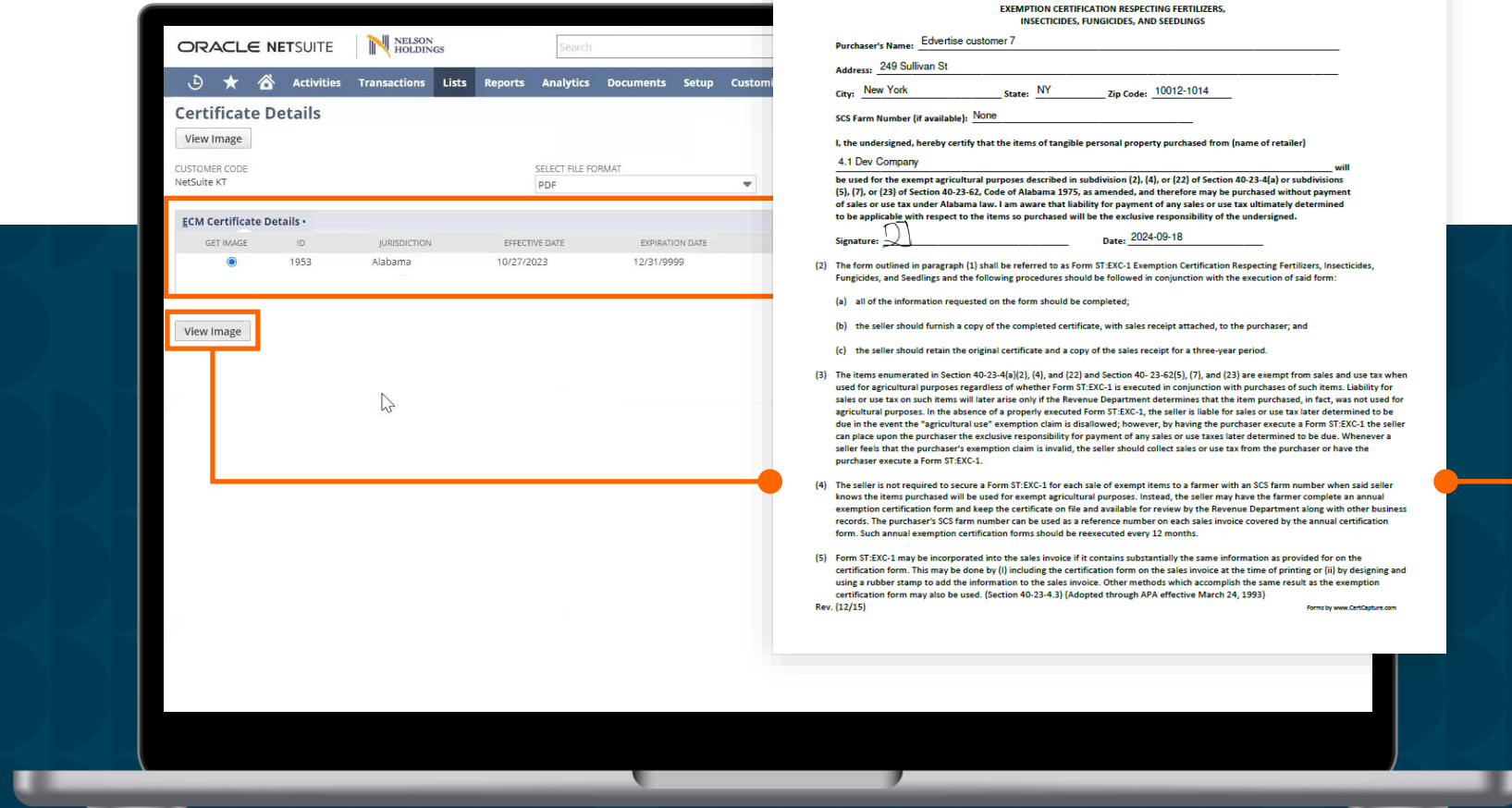
How it all
comes together for
end-to-end compliance

Purchase of goods and raw materials



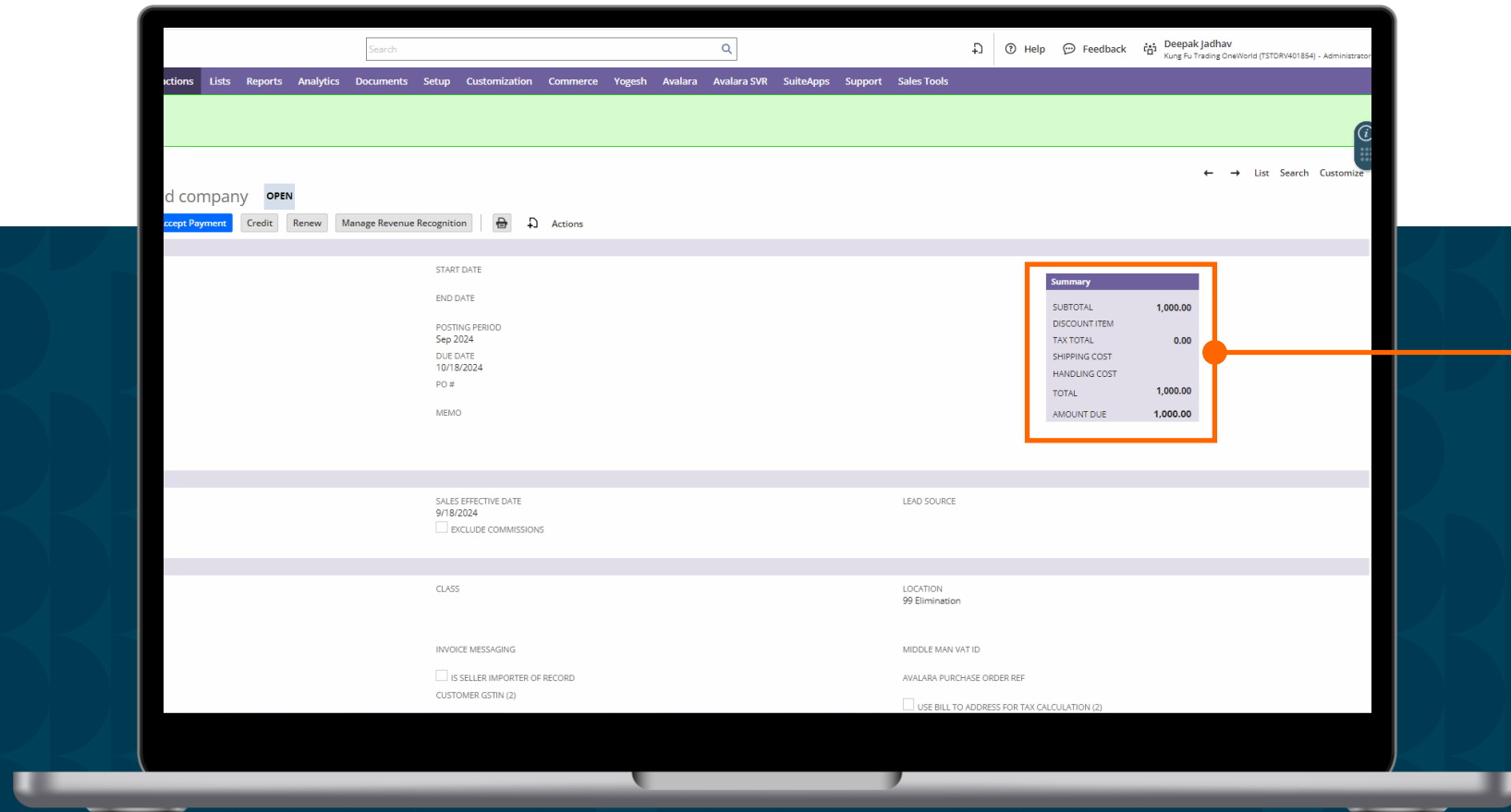
Vendor may have undercharged tax. AvaTax for Accounts Payable calculation shows the variance.

B2B exempt sales



Avalara ECM provides exemption certificate details and links certificate to customer details.

B2B exempt sales



Avalara applies the exemption to applicable product and customer transactions.

B2C domestic sales

The screenshot displays the AvaTax interface for a B2C domestic sales order. The interface includes a sidebar with navigation options: Products, Analytics, Marketing, Appearance, Plugins (1), Users, Tools, Settings, and Collapse menu. The main content area shows order details for a customer named 'dev-email@wpengine.local'.

Order Details:

- Status: Processing
- Email address: nikita.torane@avalara.com
- Phone: 1111111111
- Customer: (#1 - dev-email@wpengine.local)
- Phone: 1111111111

Item Table:

Item	Cost	Qty	Total	State Sales Tax	County Sales Tax	Special Sales Tax	Special Sales Tax
Test (SKU: 123)	\$8.00	× 10	\$80.00	\$4.80	\$0.20	\$0.40	\$0.80
Flat rate (Items: Test × 10)			\$100.00	\$0.00	\$0.00	\$0.00	-

Tax Breakdown (Highlighted):

Items Subtotal:	\$80.00
Shipping:	\$100.00
State Sales Tax:	\$4.80
County Sales Tax:	\$0.20
Special Sales Tax:	\$0.40
Special Sales Tax:	\$0.80
Order Total:	\$186.20
Paid:	\$186.20

September 18, 2024 via Direct bank transfer

Order History:

- Total orders: 30
- Total revenue: \$8,384.23
- Average order value: \$279.47

Order notes:

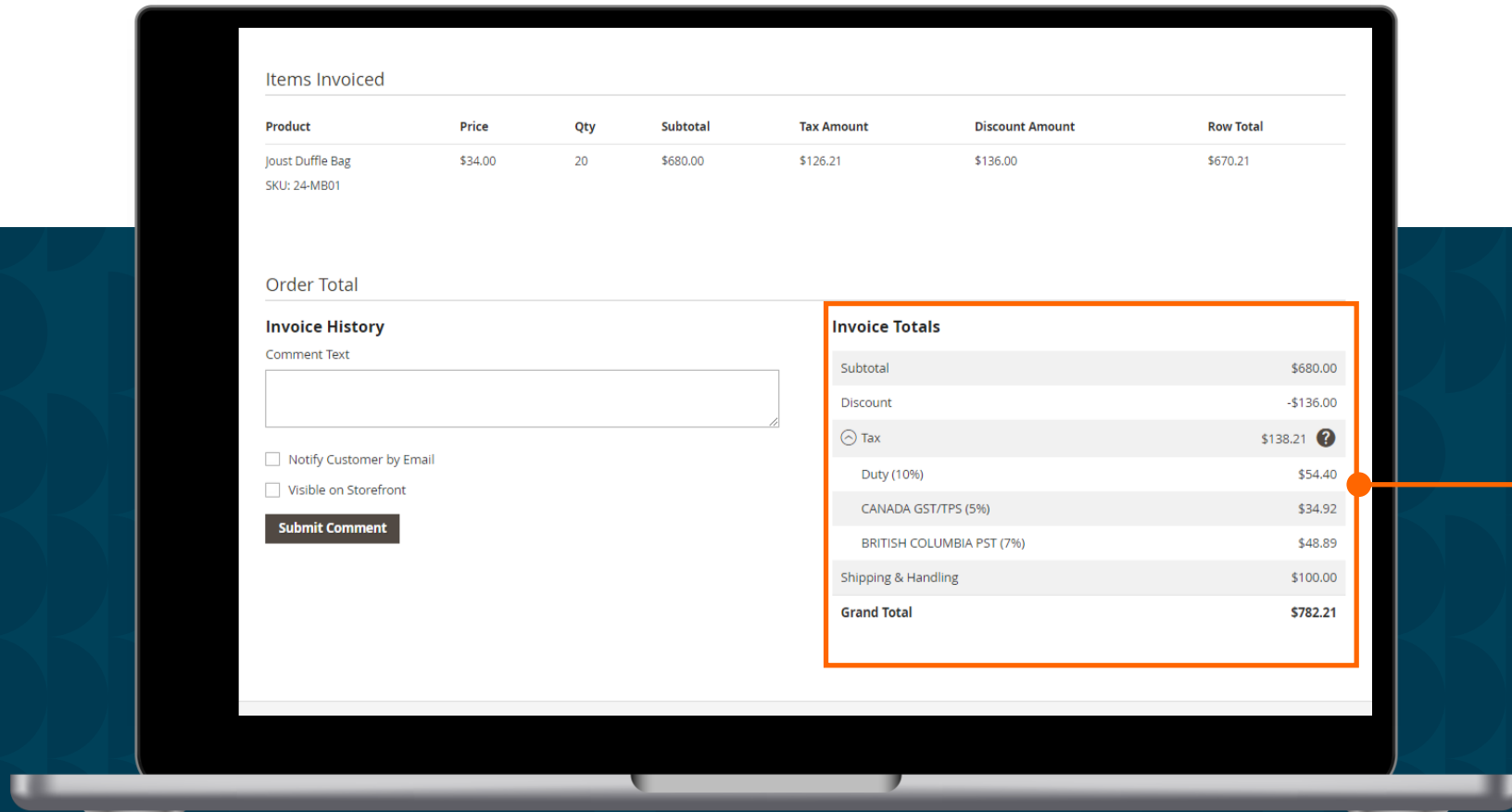
- Order sent to Avalara.
- September 18, 2024 at 10:00 am [Delete note](#)
- Order status changed from On hold to Processing.
- September 18, 2024 at 10:00 am by admin [Delete note](#)
- Awaiting BACS payment Order status changed from Pending payment to On hold.
- September 18, 2024 at 10:00 am [Delete note](#)

[Refund](#)

This order is no longer editable.

AvaTax calculation shows the breakdown of taxes calculated and applied to the order.

B2C international sales



AvaTax shows a breakdown of VAT and cross-border tariffs and duties calculated and applied to the order.

B2B international sales

e Cannon Group PLC

Tax Override

Tax Override Type
Tax Override Date
Tax Override Amount 0.00

Addresses

Origin Address 900 winslow way e, BLUE, Bl, wa, 98110, US
Destination Address DE

Total

Discount 0.00
Taxable Amount 0.00
Exempted Amount 1,000.80
Tax Amount 0.00

AvaTax VAT support

Seller Importer of Record ☐
Delivery Terms DAP
Transport Responsibility Seller
Apply Triangulation ☐

Exempted Amount	Taxable Amount	Tax Rate	Tax Amount	Tax details	Tax Area Code	Tax Code	Second-hand goods	VAT Code	Entity Use	Tax Override Type	Tax Override Date	Tax Override Amount	Tax Override Res
1,000.80	0.00	0.000000	0.00	0.00	AVATAX:VAT	P0000000	<input checked="" type="checkbox"/>	DESL000C				0.00	

AvaTax for VAT provides a breakdown of the VAT codes and calculations applied to orders in applicable countries.

B2B international sales

the Cannon Group PLC

Tax Override

Tax Override Type
Tax Override Date
Tax Override Amount 0.00

Addresses

Origin Address 900 winslow way e, BLUE, Bl, wa, 98110, US
Destination Address DE

Total

Discount 0.00
Taxable Amount 203.70
Exempted Amount 0.00
Tax Amount 42.40

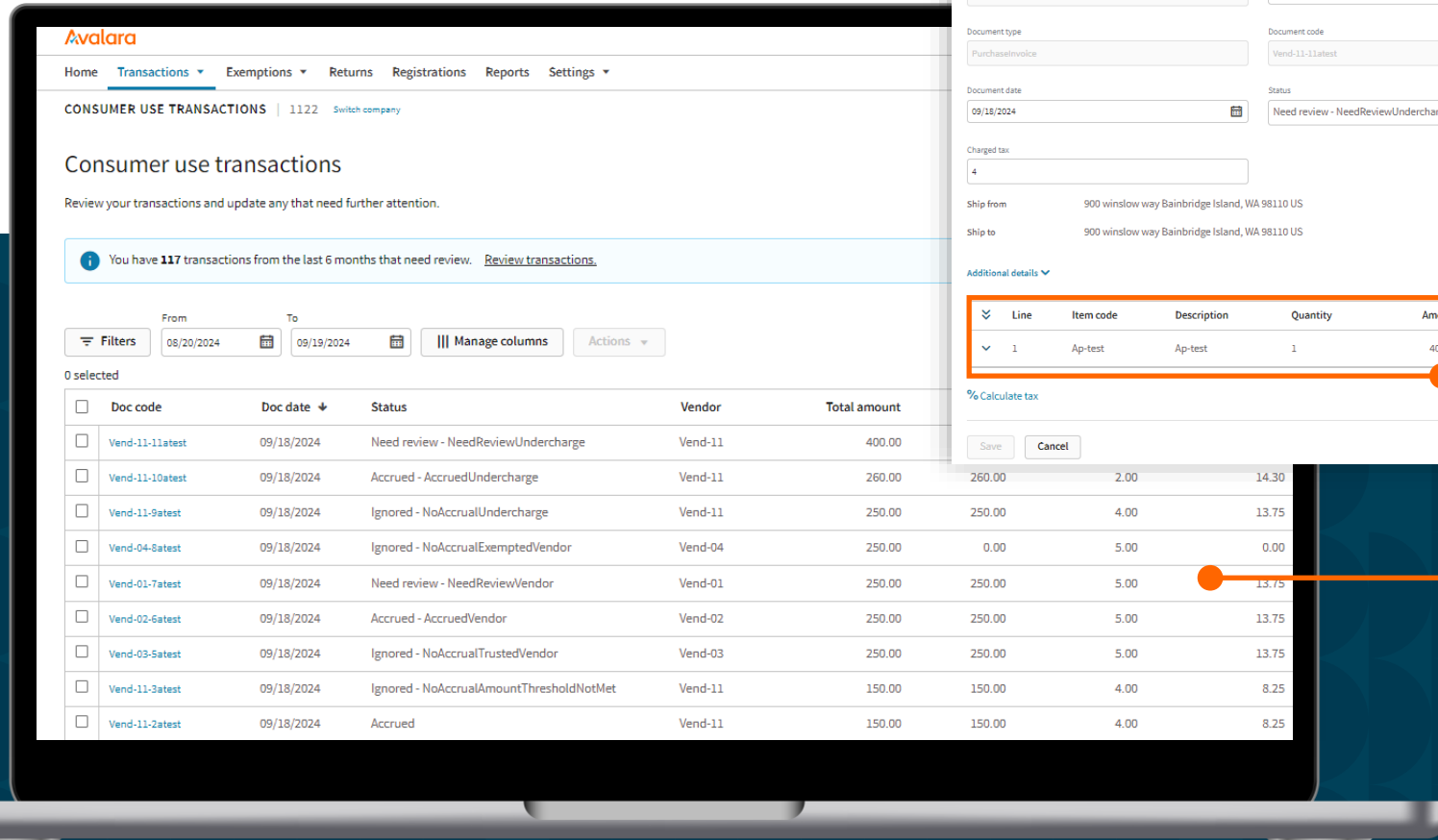
AvaTax Cross Border support

Enable Cross Border feature ☐
Seller Importer of Record ☐
Customs Duty and Import Tax 3.70
Is Preferred Program ☐
Country Of Manufacture IN

Exempted Amount	Taxable Amount	Tax Rate	Tax Amount	Tax details	Tax Area Code	Tax Code	HS Code - Harmonized System Code	Entity Use Code	Tax Override Type	Tax Override Date	Tax Override Amount	Tax Override Reason
0.00	100.00	19.000000	19.00	19.00	AVATAX	P0000000	3926100000				0.00	
0.00	103.70	22.565092	23.40	23.40	AVATAX	P0000000	9404901000				0.00	

AvaTax Cross-Border provides a breakdown of the HS codes and calculates tariffs and duties on cross-border sales.

Reporting and reconciliation



Avalara

Home Transactions Exemptions Returns Registrations Reports Settings

CONSUMER USE TRANSACTIONS | 1122 Switch company

Consumer use transactions

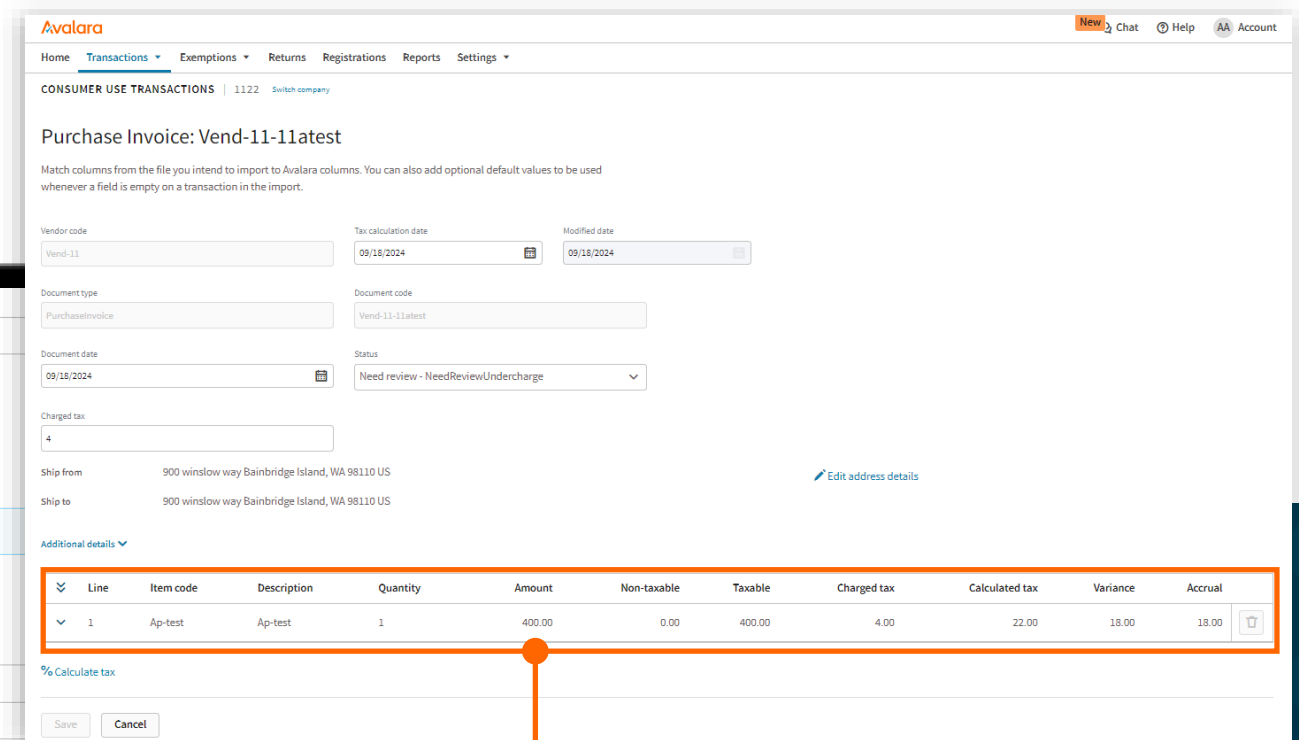
Review your transactions and update any that need further attention.

i You have **117** transactions from the last 6 months that need review. [Review transactions.](#)

Filters From 08/20/2024 To 09/19/2024 **Manage columns** **Actions**

0 selected

<input type="checkbox"/>	Doc code	Doc date ↓	Status	Vendor	Total amount
<input type="checkbox"/>	Vend-11-11atest	09/18/2024	Need review - NeedReviewUndercharge	Vend-11	400.00
<input type="checkbox"/>	Vend-11-10atest	09/18/2024	Accrued - AccruedUndercharge	Vend-11	260.00
<input type="checkbox"/>	Vend-11-9atest	09/18/2024	Ignored - NoAccrualUndercharge	Vend-11	250.00
<input type="checkbox"/>	Vend-04-8atest	09/18/2024	Ignored - NoAccrualExemptedVendor	Vend-04	250.00
<input type="checkbox"/>	Vend-01-7atest	09/18/2024	Need review - NeedReviewVendor	Vend-01	250.00
<input type="checkbox"/>	Vend-02-6atest	09/18/2024	Accrued - AccruedVendor	Vend-02	250.00
<input type="checkbox"/>	Vend-03-5atest	09/18/2024	Ignored - NoAccrualTrustedVendor	Vend-03	250.00
<input type="checkbox"/>	Vend-11-3atest	09/18/2024	Ignored - NoAccrualAmountThresholdNotMet	Vend-11	150.00
<input type="checkbox"/>	Vend-11-2atest	09/18/2024	Accrued	Vend-11	150.00



Avalara

Home Transactions Exemptions Returns Registrations Reports Settings

CONSUMER USE TRANSACTIONS | 1122 Switch company

Purchase Invoice: Vend-11-11atest

Match columns from the file you intend to import to Avalara columns. You can also add optional default values to be used whenever a field is empty on a transaction in the import.

Vendor code: Vend-11 Tax calculation date: 09/18/2024 Modified date: 09/18/2024

Document type: PurchaseInvoice Document code: Vend-11-11atest

Document date: 09/18/2024 Status: Need review - NeedReviewUndercharge

Charged tax: 4

Ship from: 900 winslow way Bainbridge Island, WA 98110 US

Ship to: 900 winslow way Bainbridge Island, WA 98110 US

[Edit address details](#)

Additional details

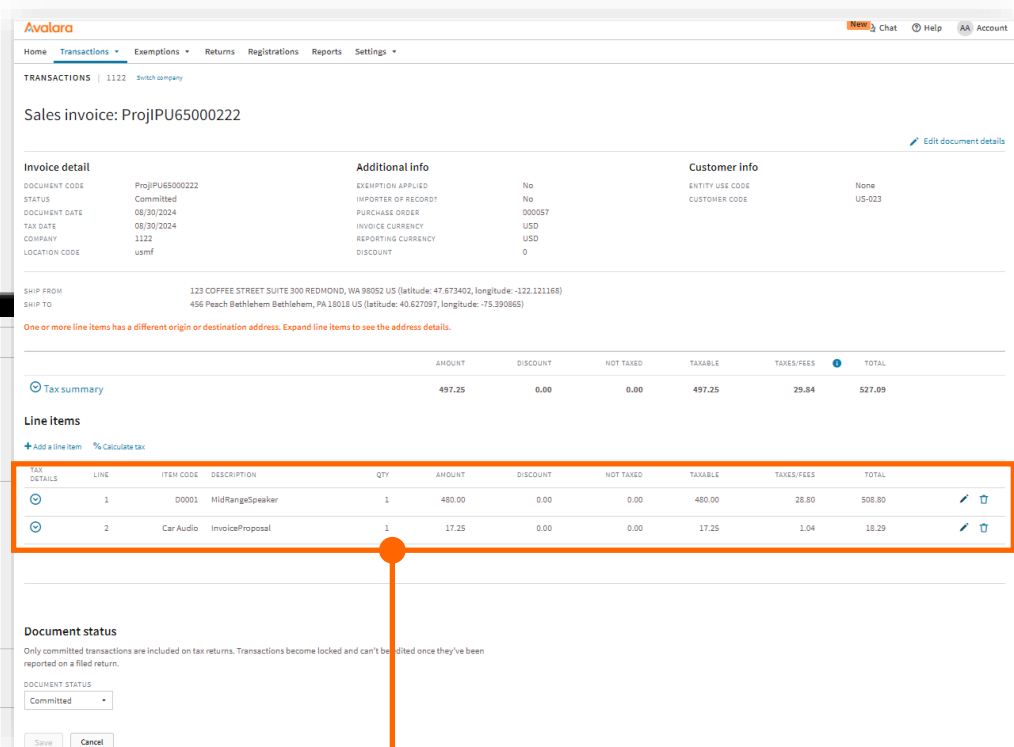
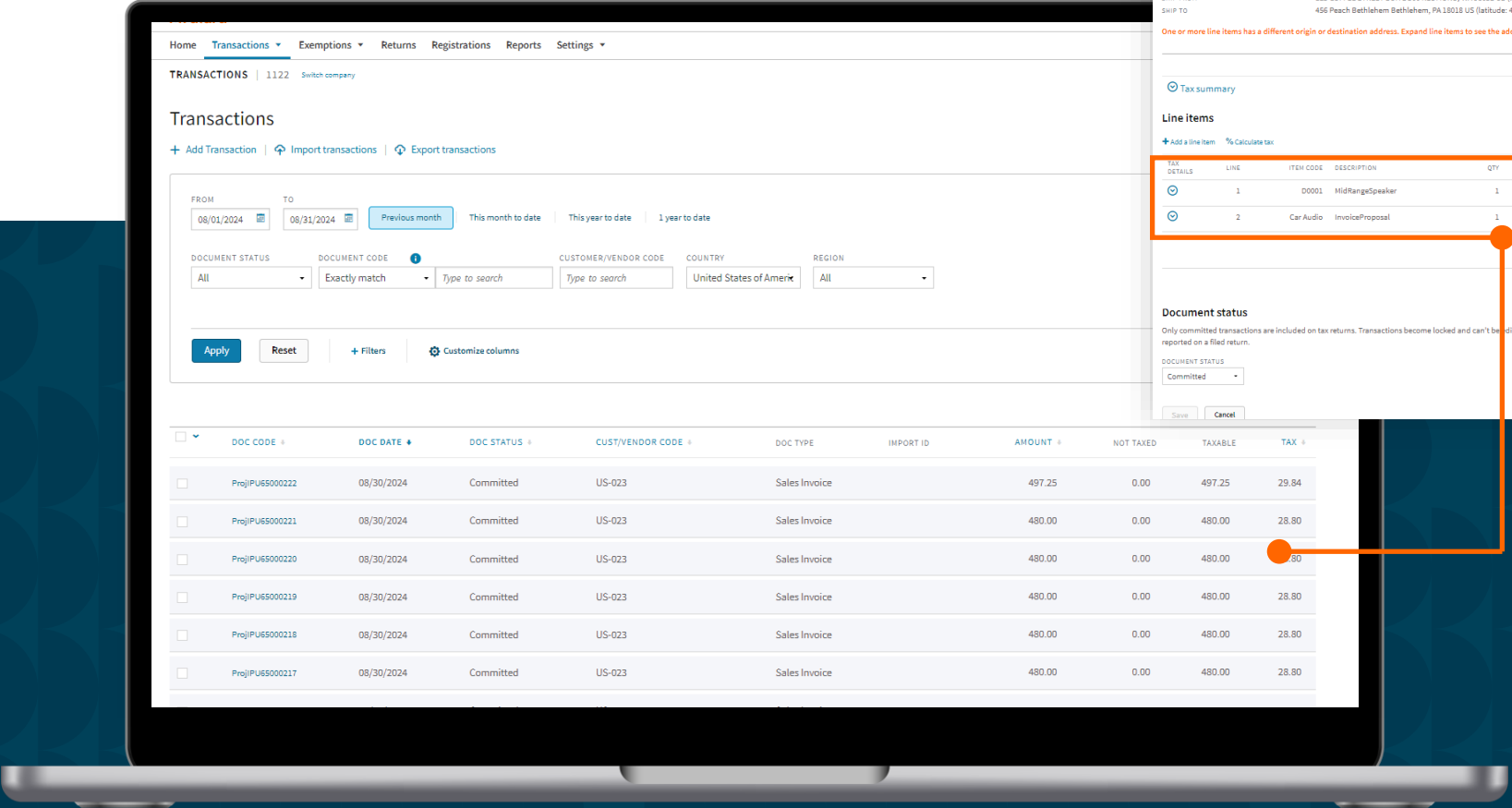
Line	Item code	Description	Quantity	Amount	Non-taxable	Taxable	Charged tax	Calculated tax	Variance	Accrual
1	Ap-test	Ap-test	1	400.00	0.00	400.00	4.00	22.00	18.00	18.00

% Calculate tax

Save **Cancel**

Avalara provides detailed summary of consumer use transactions for reporting and reconciliation.

Reporting and reconciliation



Avalara provides detailed summary of sales transactions for reporting and reconciliation.

Reporting and reconciliation

Finance and Operations

Standard view

AvaTax Reconciliation

Note: Use the AvaTax reconciliation utility to ensure all transactions from Dynamics 365 Finance & Operations are recorded in AvaTax. If any

SELECT DATES

Start date: 9/13/2024 | End date: 9/20/2024 | AvaTax Company: 1122 | Document Type: AVATAX | **Reconcile**

Documents in System: 15 | Documents in AvaTax: 56 | Documents Matched: 12 | Documents Mismatched: 45

RESULTS

Note: Check transactions from the list that are missing in AvaTax and then select "Send to AvaTax."

Table:

Document number	Name	Document date	Document type	Document ...	Document ...	Status
AS-CIV-00000799	Forest Wholesales	9/13/2024	Customer invoice	900.00	0.00	Tax amount mismatch
AS-CIV-00000803	Forest Wholesales	9/13/2024	Customer invoice	660.00	0.00	Tax amount mismatch
CCN-000004		9/13/2024	Return Invoice	-300.00	-30.90	Missing in AvaTax
CIV-000172	Maple Company	9/13/2024	Sales order	658.00	0.00	Missing in ERP
CIV-000173	Birch Company	9/13/2024	Sales order	658.00	36.19	Missing in ERP
CIV-000174	Contoso Retail Miami	9/13/2024	Sales order	658.00	0.00	Missing in ERP

Reconciliation Detail

AS-CIV-00000799 : 9/13/2024 | Standard view

DOCUMENT DETAILS

Document number: AS-CIV-00000799 | Customer name: US-003

SYSTEM DATA

Document date: 9/13/2024 | Amount: 900.00 | Tax amount: 0.00

AVATAX DATA

Document date: 9/13/2024 | Amount: 900.00 | Tax amount: 82.80

Document Status: Tax amount mismatch

View Document

Avalara reconciliation utility
in your ERP for mismatched
or missing transactions.

POLL QUESTION 4





Q&A



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