



Simpro-Avalara Connector User Guide

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1 Getting Started

1.1 Connector Overview

The Simpro-Avalara connector automates the data transfer between your Simpro account to your Avalara account.

1.1.1 Features

- Newly created/updated quote, job, recurring invoice, and invoice data in Simpro will transfer to Avalara.
- Uses your address and the customer's address to accurately calculate tax rates through Avalara's extensive tax records.
- Eliminates the need to setup and define tax codes on your own for your customers, and specific items.
- Updates your documents in Simpro with the tax amounts calculated by Avalara.
- Enables you to setup exempt customers in Avalara so that you can ensure that certain customers remain tax exempt.
- Allows you to define item codes for items that are to be taxed differently than others in your inventory.
- Generates an invoice for you in Avalara when one is created in Simpro and keeps them synced so invoices updated or deleted in Simpro, will also be updated or deleted in Avalara.

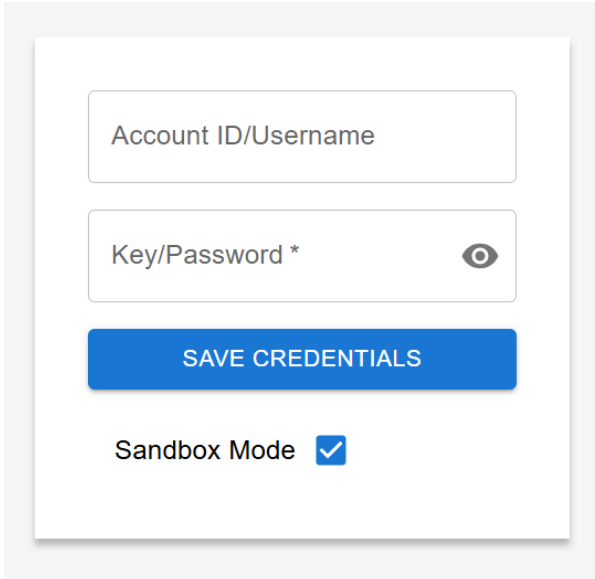
1.2 Prerequisites

- An Avalara sandbox and production account
- A Simpro account
- The connector installed by an Arvato Systems associate (avalarasupport@arvatosystems.com)
- Completion of the Simpro-Avalara Installation guide

2 Connector Overview

2.1 Logging in

1. Connect to the connector on the browser of choice. Contact a member of the Arvato Systems Avalara Connector team (avalarasupport@arvatosystems.com) to learn the URL of the connector
2. There are two ways to login, either with the username and password or with the Account ID and License Key. Toggle the “Sandbox Mode” checkbox to switch between logging into the Avalara sandbox and production environment



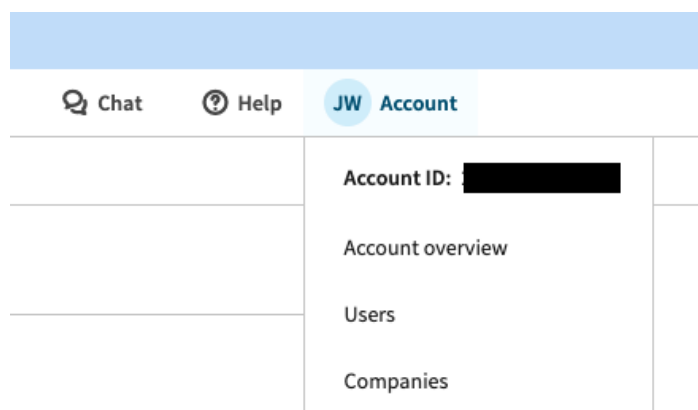
Account ID/Username

Key/Password *

SAVE CREDENTIALS

Sandbox Mode ☒

- a. Username/Password: The credentials used to login to the Avalara environment.
- b. Account ID/License Key:
 - i. The Account ID is visible after logging into Avalara and clicking on the profile icon on the top right:



- ii. To get a License Key, following this guide:
https://knowledge.avalara.com/bundle/dqa1657870670369_dqa1657870670369/page/License_keys.html

2.2 Main Connector Configuration Page

The screenshot shows the 'Simpro-Avalara Connector Configuration' page. It features a left sidebar with buttons for 'TEST CONNECTION', 'CREATE WEBHOOK', 'MANAGE ITEM CODES', and 'MANAGE SITE EXEMPTIONS'. The main area contains configuration options: 'Enable AvaTax' (checkbox), 'Account ID/Username' and 'Key/Password' (text fields), 'Sandbox Mode' (checkbox), 'CompanyCode' (dropdown), 'Company Name' (dropdown), 'SET COMPANY NAME' button, 'Commit Documents' (checkbox), 'Enable Logging' (checkbox), 'MANAGE CUSTOMER CERTIFICATES' button, 'Enter Simpro URL' section with 'Account Name / Subdomain' and 'Domain' dropdowns, and a 'SAVE' button. Red numbers 1 through 12 are placed next to specific elements to indicate the setup steps.

1. Enables Avalara Tax calculation
2. Login with to the connector with different Avalara credentials. Toggle Sandbox Mode to choose whether to login to the Avalara Sandbox or Production environments
3. Tests if connector can communicate with Avalara
4. Creates a webhook in Simpro, if the webhook already exists this will not do anything
5. See [2.3 Manage Item Codes](#)
6. See [2.4 Manage Site Exemptions](#)
7. Select the CompanyCode, this is a required field
8. Select the Company Name, click on the Set Company Name button to save
9. Enables documents to be committed in Avalara
10. Enables logging for debugging issues
11. See [2.5 Manage Customer Certificates](#)
12. Change the Simpro environment to connect to, then click the Save button.

2.3 Manage Item Codes

Item codes define the items which are sold in Avatax. For our case, we have Quotes and Jobs. Specific Tax Codes can be assigned to each, as well as a description which is used during the transactions.

1. Click **MANAGE ITEM CODES** from the Avatax Configuration screen
2. The two item codes that the connector uses will be displayed

Manage Item Codes

RETURN

To search for tax codes, please visit [Avalara Tax Codes Search](#)

Item	Item Code	Tax Code	Description	
Simpro Quote	<input type="text" value="SimproQuote"/>	<input type="text" value="P0000000"/>	<input type="text" value="Tax code for a Quote"/>	<div>SAVE</div>
Simpro Job	<input type="text" value="SimproJob"/>	<input type="text" value="P0000000"/>	<input type="text" value="Tax code for a Job"/>	<div>SAVE</div>

3. Both the Tax Code and Descriptions can be changed. To save the changes, click **Save** beside the item in the table

2.4 Manage Site Exemptions

Use codes are also used to define exemptions for the customers. This is set on a site basis, so the customer's site (address) has the exemption. This allows a customer to be exempt for one site, but not exempt in another. The connector passes the use code only when a quote/job is set at an exempt site.

1. Click **MANAGE SITE EXEMPTIONS** from the AvaTax Configuration screen
2. No sites will be displayed yet, search for them by entering their name from Simpro in the search box

Sites

RETURN TO DASHBOARD

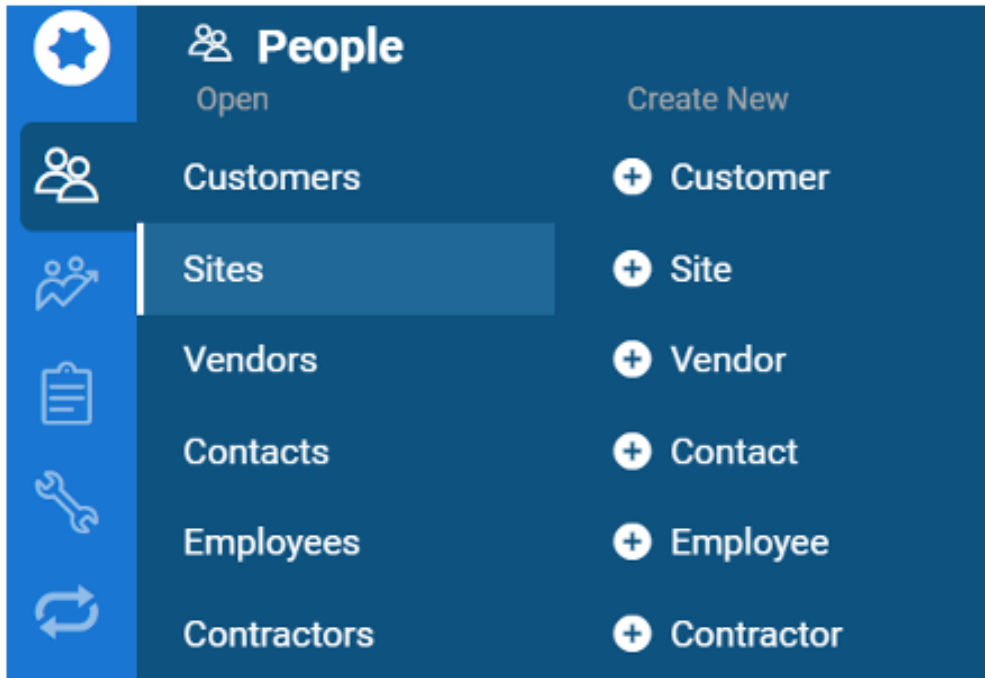
ID	Name	Use Code
Search for a site		

<

1

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3. Check the site names in Simpro by hovering over the customers icon on the left, and clicking on Sites



4. In the table, the **Site** column shows the name of the site which is used to search for this site

Manage Item Codes

RETURN

To search for tax codes, please visit [Avalara Tax Codes Search](#)

Item	Item Code	Tax Code	Description	
Simpro Quote	<input type="text" value="SimproQuote"/>	<input type="text" value="P0000000"/>	Tax code for a Quote	<input type="button" value="SAVE"/>
Simpro Job	<input type="text" value="SimproJob"/>	<input type="text" value="P0000000"/>	Tax code for a Job	<input type="button" value="SAVE"/>

5. Search for the site to set a use code for by entering its name into the **Search Site Name** field

Sites

RETURN TO DASHBOARD

Search Site Name

6. There will be several sites that match the search, and these results may span multiple pages, which can be navigated by pressing the page numbers at the bottom of the table

ID	Name		Use Code	
2836	Office	1 connected customer	Use Code	SAVE
3746	Office & Warehouse	1 connected customer	Use Code	SAVE
3747	Office & Warehouse	1 connected customer	Use Code	SAVE

< 1 >

7. Check what customer the site is connected to by pressing on the pink box that says **{number} connected customer(s)**

2836	Office	1 connected customer	Use Code	SAVE
Nine Energy Service (131)				

8. To set the use code, press on the **Use Code** box, and a list of use codes will be presented. Click on the use code to apply.

Sites

Search Site Name

office

ID	Name	
2836	Office	1 connected customer
3746	Office & Warehouse	1 connected customer
3747	Office & Warehouse	1 connected customer

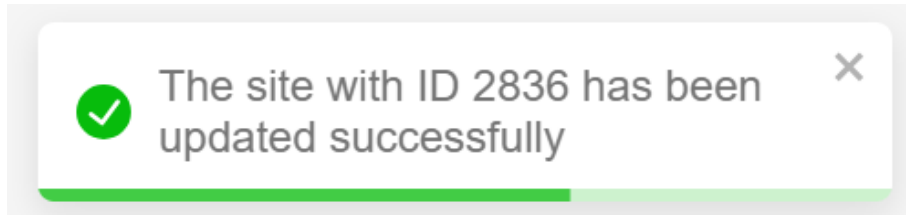
RETURN TO DASHBOARD

- A - FEDERAL GOV
- B - STATE GOV
- C - TRIBAL GOVERNMENT
- D - FOREIGN DIPLOMAT
- E - CHARITABLE/EXEMPT ORG
- F - RELIGIOUS ORG
- G - RESALE
- H - AGRICULTURE
- I - INDUSTRIAL PROD/MANUFACTURERS
- J - DIRECT PAY
- K - DIRECT MAIL
- L - OTHER/CUSTOM
- M - EDUCATIONAL ORG
- N - LOCAL GOVERNMENT
- P - COMMERCIAL AQUACULTURE
- Q - COMMERCIAL FISHERY
- R - NON-RESIDENT
- TAXABLE - NON-EXEMPT TAXABLE CUSTOMER

- Once the use code is selected, save the site by pressing the blue **Save** button on the right of the row

2836	Office	1 connected customer	Use Code A - FEDERAL GOV	SAVE
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- The use code has been successfully saved when the following popup on the top-right side of the screen is visible



2.5 Manage Customer Certificates

Customer certificates enables specific specific customers to be tax exempt. This page enables users to browse customers and their certificates set in Avalara.

- Click **MANAGE CUSTOMER CERTIFICATES** from the AvaTax Configuration screen
- No customers will be displayed yet, search for them by entering in a name

Customers

RETURN TO DASHBOARD

Search Customer

ID	Name	Customer Record Present	Customer Certificate Present
Search for a customer			

< 1 >

- When a customer is successfully found, their record and certificate are viewable.

Customers

[RETURN TO DASHBOARD](#)

Search Customer

test

ID	Name	Customer Record Present	Customer Certificate Present	
13405	Test Co	⚠ Customer not found in Avatax	⚠ No certificates found	MANAGE INFO

<
1
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4. Clicking on **MANAGE INFO**, will enable users to validate the user's address

Avalara Customer Info

Customer Code *

13405

Name *

Test Co

Line 1 *

Line 2

City *

Postal Code *

Country *

Region *

Email Address

VALIDATE

3 Troubleshooting

3.1 Enabling/Disabling the Connector

The Connector requires both the Webhook in the Simpro Account and the AvaTax calculation checkbox in the connector to be enabled. If either of these are disabled, the connector will not function.

3.1.1 Enabling/Disabling the Webhook in Simpro

1. In Simpro, at the top right there is a gear icon, hover over it
2. Select **Setup** from the drop-down menu
3. Scroll down on the page, on the left hand side you will see a menu. Hover over the second to last entry: **API**
4. In the menu that pops up, click on **Webhook Subscriptions**
5. Towards the bottom, you will see a webhook subscription named **Avalara Connector Webhook**, click on this
6. On the right, you can see a **Status** switch, which should be on **Enabled** when the connector is connected to Simpro
7. Toggle this switch to either **ENABLED** or **DISABLED**, and then press **Save** at the bottom of the screen

3.1.2 Enabling/Disabling AvaTax in the Connector

1. Login to the Connector
2. Toggle the “Enable AvaTax” checkbox, to disable/enable Avalara tax calculations