Simpro-Avalara Connector Installation Guide

08/18/2025

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1 Getting Started

1.1 Connector Overview

The Simpro-Avalara connector integrates Simpro with Avalara's AvaTax tax calculation service. This connector enables automatic tax calculation for transactions processed through Simpro by leveraging Avalara's cloud-based tax engine.

The connector is delivered as a SaaS (Software as a Service) product and can be configured by reaching the React Frontend. The administrator(s) must have their IP whitelisted to gain access to the system.

1.2 System Requirements

The Simpro - Avalara Connector is designed to run inside a docker container and can be hosted locally or on any desired cloud provider (AWS, Azure, Google, etc).

The docker requirements are lightweight and can be run on an AWS EC2 `t2.micro` instance (up to a 3.3 GHz Intel Xeon processor, 6 CPU credits/hr and 1 GB memory) or equivalent system.

1.3 Architecture Diagram
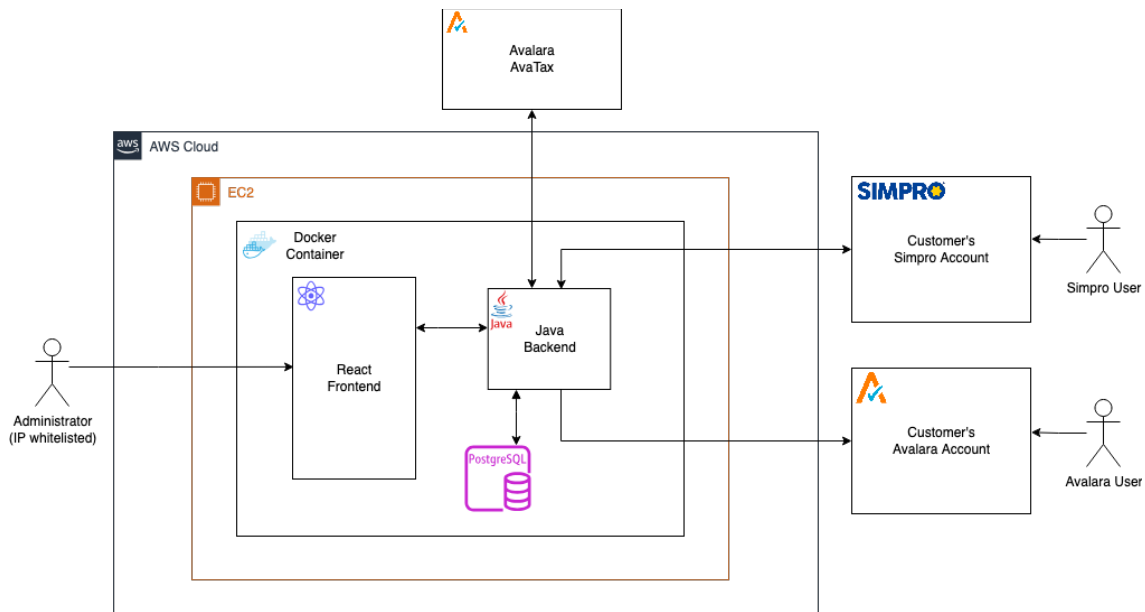
1.4 Version History

Build Date	Changes
7/9/25	Updated AvaTax API to 25.2.2 Use OAuth Authentication to connect Simpro instead of an API key
7/16/24	Initial Release AvaTax API 24.6.4

2 Connector Installation Process

2.1 Connector Installation

The connector is delivered as a SaaS (Software as a Service) product. Installation, bug fixes and security updates will be handled by Arvato Systems. It is the customer's responsibility to correctly configure the connector, and their Simpro system.
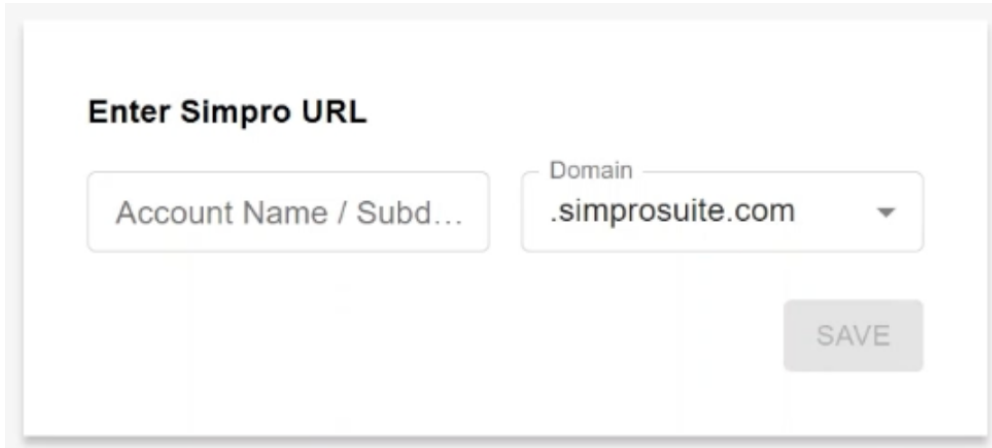
Contact Arvato Systems (avalarasupport@arvatosystems.com) to report any bugs and to troubleshoot configuration issues.

2.2 Updates to the Connector

When an update to the connector is required, Arvato Systems will notify the customer at least 1 business day (or longer if a customer desires) in advance. The timing of the maintenance will be coordinated on a per client basis to minimize impact on business functions. The expected downtime for an update is at most 1 hour.

3 Connector setup

1. Connect to the connector on the browser of choice. Contact a member of the Arvato Systems Avalara Connector team (avalarasupport@arvatosystems.com) to obtain the URL and access to the connector

2. On this page, enter the Account name/Subdomain of the Simpro environment without the `https://` protocol. In addition, select the Domain that matches the system, either `.simprosuite.com` or `.simprocloud.com` and then click Save.

Enter Simpro URL

Account Name / Subd...	Domain
	.simprosuite.com ▾

SAVE
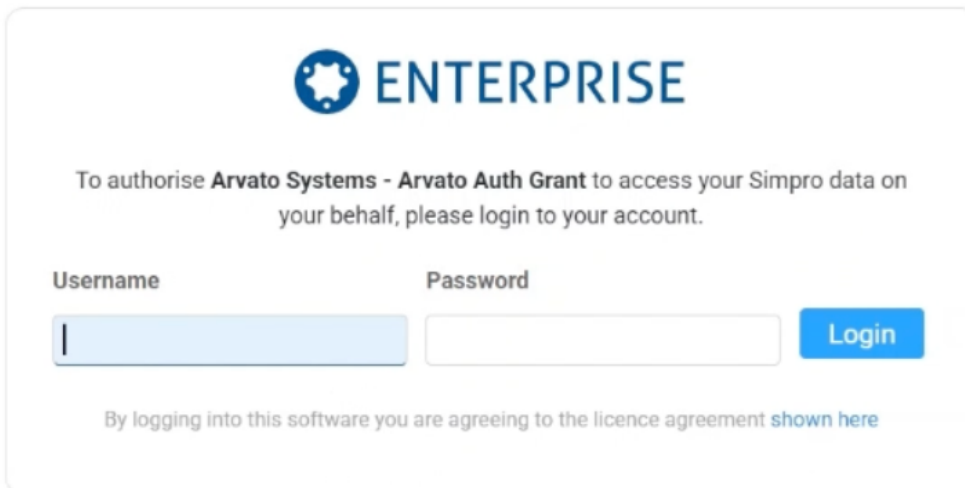
For example:
If the Simpro environment URL is: `https://enterprise-sandbox-us.simprosuite.com`
Enter the Subdomain: `enterprise-sandbox-us`
And select the Domain: `.simprosuite.com`

1. Next the user will be prompted to enter their Simpro credentials:

⚙ ENTERPRISE

To authorise **Arvato Systems - Arvato Auth Grant** to access your Simpro data on your behalf, please login to your account.

Username	Password	
		Login

By logging into this software you are agreeing to the licence agreement shown here

2. After entering in the correct credentials, click Yes to grant the connector access to the Simpro account.

3. Next enter the Ship from address of the the company, this will be used for Avalara tax calculation

4. Click **Check** to use Avalara's address verification API to verify the address

   a. If successful, a validated address from Avalara will appear and can be chosen if correct.

   b. If there is an issue with the address, error messages from Avalara will appear. This address cannot be accepted. Modify the Ship From Address to get a valid Address from Avalara.

5. Click **Accept & Save** when the validated address is correct

6. Next enter the Simpro company name. Search for or select from the dropdown menu the Simpro company, then select **SET COMPANY NAME**

7. After this screen, a webhook will be created automatically in the Simpro account. It will be named "CONNECTOR-WEBHOOK" located in API → Webhook Subscriptions.

8. This is the main configuration screen. On the top right side, there will be an error that there's no company code set. This is the company code from Avalara. Please select from the CompanyCode dropdown menu and select a valid Avalara company code.

9. The connector has been successfully configured!