



# **Simpro - Avalara End User Documentation**

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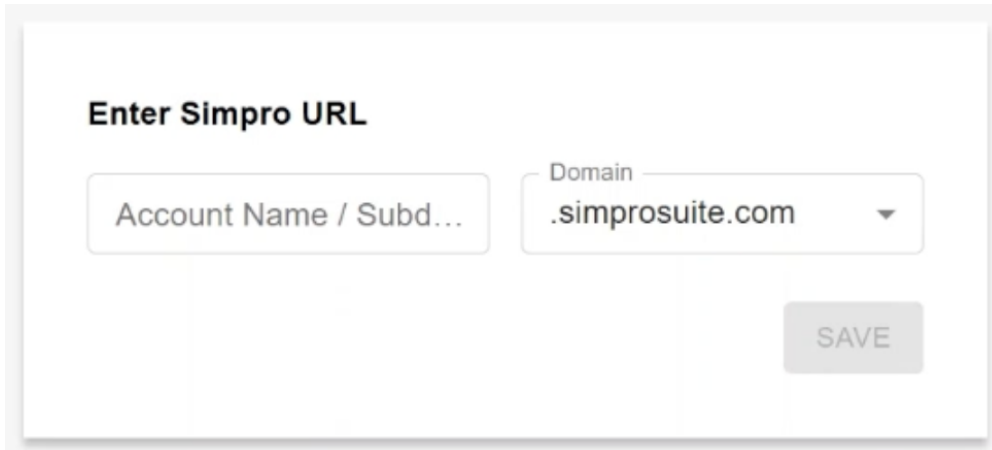
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# 1 Initial Connector Configuration

This tutorial guides users through the initial connector setup.

## 1.1 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](mailto: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.



The screenshot shows a web form titled "Enter Simpro URL". It contains two input fields: "Account Name / Subd..." and "Domain". The "Domain" dropdown menu is currently set to ".simprosuite.com". A "SAVE" button is located at the bottom right of the form.

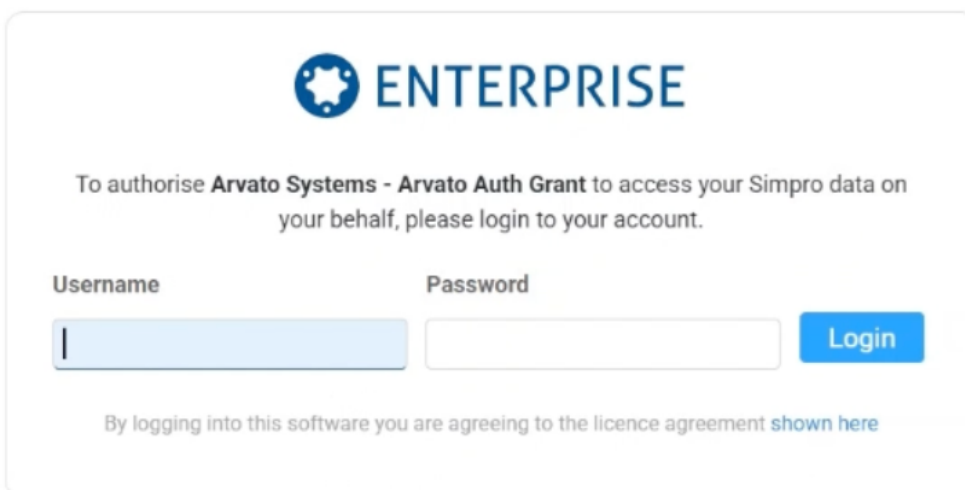
For example:

If the Simpro environment URL is: `https://enterprise-sandbox-us.simprosuite.com`

Enter the Subdomain: `enterprise-sandbox-us`


And select the Domain: `.simprosuite.com`

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



The screenshot shows the "ENTERPRISE" login page. It features the Arvato Systems logo and the text: "To authorise Arvato Systems - Arvato Auth Grant to access your Simpro data on your behalf, please login to your account." Below this, there are input fields for "Username" and "Password", and a blue "Login" button. At the bottom, a note states: "By logging into this software you are agreeing to the licence agreement [shown here](#)".

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

 **ENTERPRISE**

You are currently logged in as [REDACTED]

Do you authorise **Arvato Systems - Arvato Auth Grant** to access your Simpro data on your behalf?

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

Please enter your Ship From address for tax calculation

Line 1

Line 2

Line 3

City

State/Province

Postal code

Country

Sandbox Mode ☒

6. 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.

Please enter your Ship From address for tax calculation

Line 1  
1745 Broadway

Line 2

Line 3

City  
New York

State/Province  
NY

Postal code

Country  
US

**CHECK**

Sandbox Mode ☒

**Validated Address**

**AddressType:**  
HighRiseOrBusinessComplex

**Line1:**  
1745 Broadway

**Line2:**

**Line3:**

**City:**  
New York

**Region:**  
NY

**Country:**  
US

**PostalCode:**  
10019-4640

**Latitude:**  
40.765381

**Longitude:**  
-73.982074

**ACCEPT & SAVE**

- 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.

Please enter your Ship From address for tax calculation

Line 1  
1745 Broadway

Line 2

Line 3

City  
New York

State/Province  
CA

Postal code

Country  
US

**CHECK**

Sandbox Mode ☒

**Validated Address**

**AddressType:**  
UnknownAddressType

**Line1:**  
1745 Broadway

**Line2:**

**Line3:**

**City:**  
New York

**Region:**  
CA

**Country:**  
US

**PostalCode:**

**Latitude:**  
null

**Longitude:**  
null

**Error Messages:**

① Address not geocoded.

① The address number is out of range

7. Click **Accept & Save** when the validated address is correct
8. Next enter the Simpro company name. Search for or select from the dropdown menu the Simpro company, then select **SET COMPANY NAME**


9. After this screen, a webhook will be created automatically in the Simpro account. It will be named "CONNECT-WEBHOOK" located in API → Webhook Subscriptions.
10. 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.

11. The connector has been successfully configured!

### Simpro-Avalara Connector Configuration

Enable AvaTax ☐

Account ID/Username

Key/Password \* 

SAVE CREDENTIALS

Sandbox Mode ☒

TEST CONNECTION

CREATE WEBHOOK

MANAGE ITEM CODES

MANAGE SITE EXEMPTIONS

CompanyCode \*  
DEFAULT

Required

Company Name  
Arvato Systems

SET COMPANY NAME

Commit Documents ☐

Enable Logging ☐

MANAGE CUSTOMER CERTIFICATES

**Enter Simpro URL**

Account Name / Subdomain  
enterprise-sandbox-us

Domain  
.simprosuite.com

SAVE

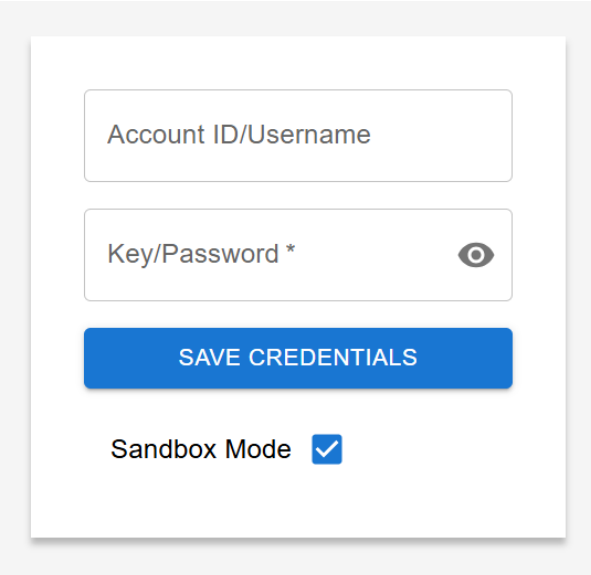
## 2 Connector Overview

### 2.1 Prerequisites

- Completion of [Initial Connector Configuration](#)
- Access to the Simpro connector

### 2.2 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](mailto: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



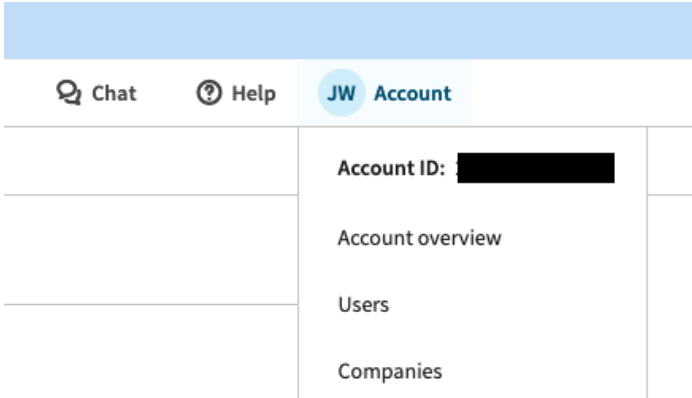
Account ID/Username

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:



Chat Help JW Account

Account ID: [redacted]

Account overview

Users

Companies



- ii. To get a License Key, following this guide:  
[https://knowledge.avalara.com/bundle/dqa1657870670369\\_dqa1657870670369/page/License\\_keys.html](https://knowledge.avalara.com/bundle/dqa1657870670369_dqa1657870670369/page/License_keys.html)

## 2.3 Main Connector Configuration Page

The screenshot shows the 'Simpro-Avalara Connector Configuration' page. It features a left sidebar with numbered buttons (1-6) and a main configuration area with various fields and buttons. Red numbers 1 through 12 are placed next to specific UI elements to indicate their function as described in the list below.

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 2.4 Manage Item Codes
6. See 2.5 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 2.6 Manage Customer Certificates
12. Change the Simpro environment to connect to, then click the Save button.

## 2.4 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"/>	<input type="button" value="SAVE"/>
Simpro Job	<input type="text" value="SimproJob"/>	<input type="text" value="P0000000"/>	<input type="text" value="Tax code for a Job"/>	<input type="button" value="SAVE"/>

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

## 2.5 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

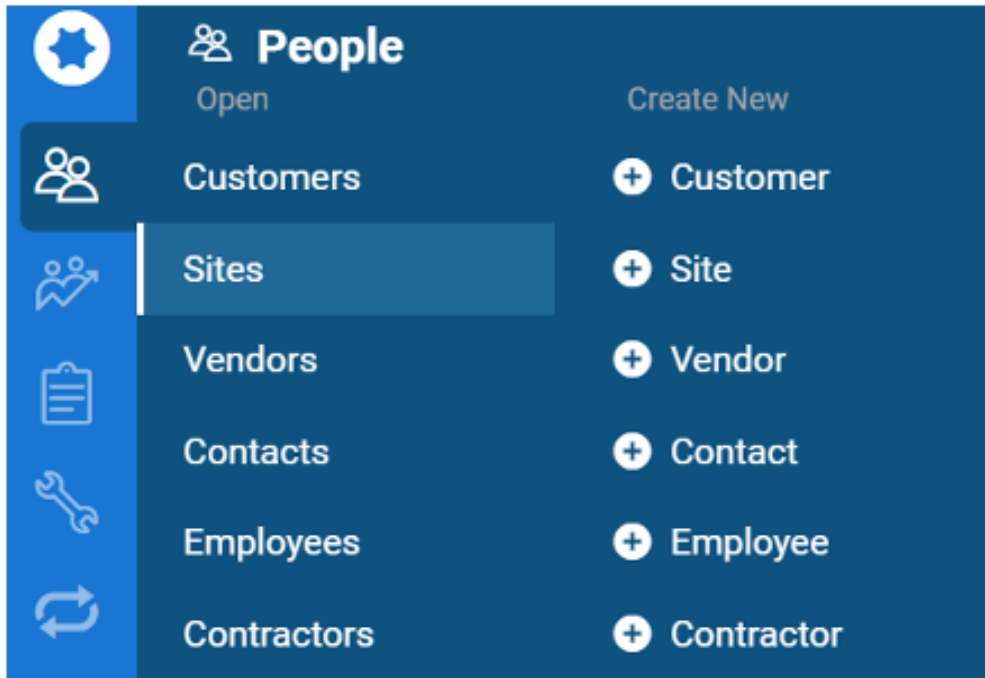
Sites

RETURN TO DASHBOARD

ID	Name	Use Code
Search for a site		

< 1 >

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

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

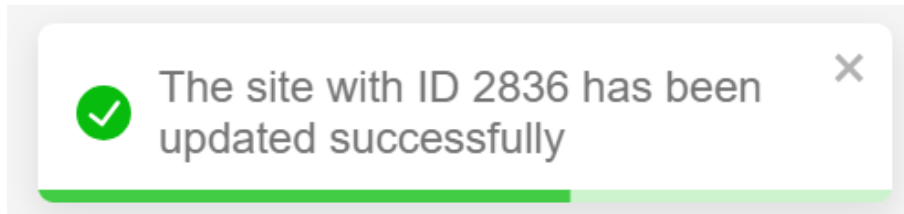
RETURN TO DASHBOARD

- 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
------	--------	----------------------	-----------------------------	------

- The use code has been successfully saved when the following popup on the top-right side of the screen is visible



## 2.6 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

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

< 1 >

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