



## Avalara for Adobe Commerce

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### System Integration Document for Avalara AvaTax

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## 1.0 Connector Overview

The Avalara for Adobe Commerce connector provides rapid integration for Adobe Commerce implementations. The extension is open-sourced package that can easily integrate into any Adobe Commerce instance. This extension can be configured in the Adobe Commerce Administrator and contain all the elements necessary to perform a successful implementation of AvaTax **Tax Calculation, Address Validation, Customer exemptions, VAT ID, Product Synchronization with Avalara, and Transactions outside the U.S.** services.

### Note:

Starting from this release, we've updated the setup process for the connector. Advanced settings such as, Tax calculation, Address validation, Customer exemptions, VAT ID, and Product sync are now managed directly within Avalara, simplifying the integration.

Some tax calculation settings and VAT transport settings can still be managed from Adobe Commerce.

## 2.0 Configuration

### 2.1. Configure

To configure the Avalara for Adobe Commerce connector, navigate to **Admin > Stores > AvaTax Configuration > Configure**.

Sr. No.	Label	Value	Default Value	Description
1.	AvaTax Extension Version	• Extension Version	2.8.0	• The extension version of AvaTax.
2.	Account ID			• AvaTax account number
3.	License Key			• AvaTax license key

## 3.0 Advanced Settings

### 3.1. Tax Calculation

To configure the tax calculation settings for the Avalara for Adobe Commerce connector, navigate to **Admin > Stores > AvaTax Configuration > Configure > Advanced Settings > Tax Calculation**.

Sr. No.	Label	Value	Default Value	Description
1.	Customer Code Format	<ul style="list-style-type: none"> <li>List of Customer Attributes</li> </ul>	ID	<ul style="list-style-type: none"> <li>Select a format for identifying customers in Avalara. If you don't define a value for the selected attribute, the customer or guest ID is used. You cannot change this setting once the integration is live.</li> </ul>
2.	UPC Attribute To Use As Item Code	<ul style="list-style-type: none"> <li>List of Product Attributes</li> </ul>	No Attribute	<ul style="list-style-type: none"> <li>By default, this selection sends the Adobe Commerce product SKU to the AvaTax ItemCode field. If you want to use a UPC product attribute as the AvaTax ItemCode, select which attribute maps to your UPC attribute. If a UPC attribute is present on a product record, it's used as the AvaTax ItemCode and is prepended to the UPC. Otherwise, the product's SKUs are sent.</li> </ul>

### 3.2. Transactions outside the US

To configure VAT transport for the Avalara for Adobe Commerce connector, navigate to **Admin > Stores > AvaTax Configuration > Configure > Advanced settings > Transactions outside the US**.

Sr. No.	Label	Value	Default Value	Description
1.	Submit VAT Transport	<ul style="list-style-type: none"> <li><b>Shipping Method:</b> List of enabled shipping methods</li> <li><b>Transport:</b> Possible Transport values received from AvaTax API</li> </ul>	Seller	<ul style="list-style-type: none"> <li>Admin can assign separate Transport values for all enabled shipping methods, and this is sent in Tax Calculation request for the selected shipping method on Checkout.</li> </ul>

## 4.0 List of Integration Points

The following table informs you about the list of integration points given on the Adobe Commerce integration pages:

Sr. No.	Platform Functionality	Address Validation	Tax Calculation	Tax Certificate	Cross Border
1.	Adobe Commerce Admin - Customer Add/Update Address	Yes	No	No	No
2.	Adobe Commerce Admin - Customer Add/Invalidate Tax Certificate	No	No	Yes	No
3.	Adobe Commerce Admin – View/Add/Delete Customer Tax Classes	No	Yes	No	Yes
4.	Adobe Commerce Admin – View/Add/Delete Product Tax Classes	No	Yes	No	No
5.	Adobe Commerce Admin – View/Add/Delete Cross Border Types	No	Yes	No	Yes
6.	Adobe Commerce Admin – View/Add/Delete Cross Border Classes	No	Yes	No	Yes
7.	Adobe Commerce Admin – View/Clear Logs	Yes	Yes	No	Yes
8.	Adobe Commerce Admin – View/Clear/Process Queue Items	No	Yes	No	No
9.	Adobe Commerce Admin – Add/Update Product	No	No	No	Yes
10.	Adobe Commerce StoreFront - My Account Address Add/Update Address	Yes	No	No	No
11.	Adobe Commerce StoreFront - My Account List/Add/Invalidate Tax Certificates	No	No	Yes	No
12.	Adobe Commerce StoreFront Checkout - Shipping	Yes	No	No	No
13.	Adobe Commerce StoreFront Checkout - Review & Payments	No	Yes	Yes	Yes
14.	Adobe Commerce Admin – Invoice Generation	No	Yes	No	No
15.	Adobe Commerce Admin - Credit Memo	No	Yes	No	No
16.	Adobe Commerce Admin - New Order	Yes	Yes	Yes	Yes

## 5.0 Request Mapping

The following fields/attributes displays the integration points used for the Address Validation:

### 5.1. Address Validation

Sr. No.	Adobe Commerce Field	AvaTax Field	Data Type
1.	street	line1	String
2.	street	line2	String
3.	street	line3	String
4.	city	city	String
5.	regionId	region	String
6.	countryId	country	String
7.	postalCode	postalCode	String

### 5.2. Tax Calculation

The following fields/attributes displays the integration points used for the Tax Calculation:

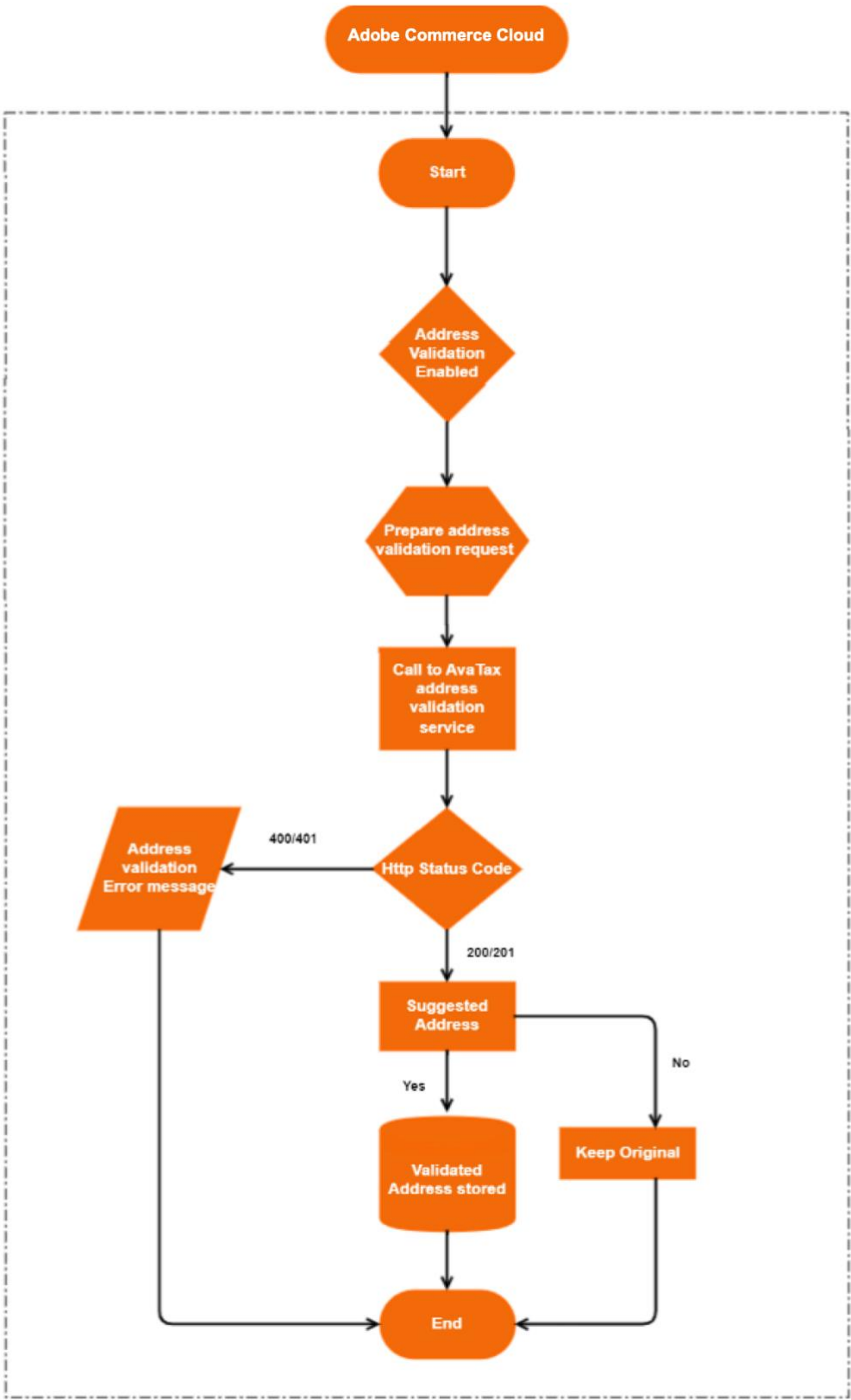
Sr. No.	API Field	Adobe Commerce Field	Data Type	Description
1.	X-Avalara-Client	Header (Adobe Commerce Base URL)	String	<ul style="list-style-type: none"> <li>App Name + App Version + Adapter Name + Adapter Version + Machine Name</li> <li>Example: Avalara for Adobe Commerce    2.3.1v2;2.3.1; PhpRestClient; 22.3.0; www.local-salestax.com</li> </ul>
2.	code	QuoteID/InvoiceID/CreditMemold	String	<ul style="list-style-type: none"> <li>The internal reference code used by the client application. This is used for operations such as Get, Adjust, Settle, and Void. If you leave the transaction code blank, a GUID will be assigned to each transaction.</li> <li>Example: quote-1, INV000001, CM0000001</li> </ul>
3.	lines	Product/QuoteItems/OrderItems/InvoiceItems/ProductTaxClasses	LineItemModel	<ul style="list-style-type: none"> <li>A list of line items that will appear on this transaction. <a href="#">LineItemModel</a></li> </ul>
4.	type	entity_type from eav_entity_types	String	<ul style="list-style-type: none"> <li>Specifies the type of document to create. A document type ending with Invoice is a permanent transaction that will be recorded in AvaTax. A document type ending with Order is a</li> </ul>

Sr. No.	API Field	Adobe Commerce Field	Data Type	Description
				temporary estimate that will not be preserved. <ul style="list-style-type: none"> <li>Example: SalesOrder, SalesInvoice, PurchaseOrder, Purchase Invoice, ReturnOrder, ReturnInvoice</li> </ul>
5.	companyCode	AvaTax Company Code	String	<ul style="list-style-type: none"> <li>Specify the code of the company creating this transaction here. If you leave this value null, your account's default company will be used instead.</li> </ul>
6.	date	created_at	String	<ul style="list-style-type: none"> <li>Transaction Date - The date on the invoice, purchase order, etc.</li> </ul>
7.	customerCode	Customer ID/Email depend upon Customer Code Format setting	String	<ul style="list-style-type: none"> <li>The client application customer reference code. Note: This field is case sensitive. To have exemption certificates apply, this value should be the same as the one passed to create a customer.</li> </ul>
8.	entityUseCode	Based on Customer Class	String	<ul style="list-style-type: none"> <li>The client application customer or usage type.</li> </ul>
9.	businessIdentificationNo			<ul style="list-style-type: none"> <li>VAT business identification number for the customer for this transaction</li> </ul>
10.	currencyCode	Currency table	String	<ul style="list-style-type: none"> <li>The three-character ISO 4217 currency code for this transaction.</li> </ul>
11.	exchangeRate	Currency rate table	Float	<ul style="list-style-type: none"> <li>Currency exchange rate from this transaction to the company base currency.</li> </ul>
12.	exchangeRateEffectiveDate	Currency rate table	String	<ul style="list-style-type: none"> <li>Effective date of the exchange rate.</li> </ul>
13.	reportingLocationCode		String	<ul style="list-style-type: none"> <li>Sets the sale location code (Outlet ID) for reporting this document to the tax authority.</li> </ul>
14.	purchaseOrderNo	Increment_id	String	<ul style="list-style-type: none"> <li>Purchase Order Number for this document.</li> </ul>
15.	addresses	Address Tables	AddressesModel	<ul style="list-style-type: none"> <li>Default addresses for all lines in this document.  <a href="#">AddressesModel</a> </li> </ul>
16.	parameters	AvaTax – General Config's transport and transport_shipping  Shipping: "country:region:shipping method:amount currency" Example: "US:WA:flatrate_flatrate:50:00 USD"	String	<ul style="list-style-type: none"> <li>Admin can assign separate Transport values for all enabled shipping methods, and this is sent in Tax Calculation request for the selected shipping method on Checkout.</li> </ul>



6.0 Workflows

Address Validation:



Tax Calculation:

