



Address Validation for AvaTax

Megan De Freitas - 2024-11-22 - Sales

Note: While available as part of the standard Settings and Security in SalesPad, this interface was created on a custom basis for a specific customer configuration. Please contact SalesPad to confirm versions of SalesPad and Avalara/AvaTax in which this interface is currently supported. If you need functionality beyond the features outlined in this document, [please contact your Account Manager](#) to receive a quote on support for the desired version or functionality.

Overview

SalesPad has incorporated Address Validation for AvaTax. It will validate addresses in two places:

- Any contact address created or updated from the Customer Card
- The Ship To address of a sales document, any time you save it

Note: A special log4net.dll file is needed for address validation to function. If you do not have this file in your SalesPad installation, please reach out to Cavallo Support to obtain it.

User Fields

For versions previous to 4.1 only. This user field is not needed in versions 4.1 and later.

Create the user field shown below, xValidated, in the User Field Editor. For more information on creating user fields, refer to the SalesPad User Defined Fields document.

The screenshot shows the 'User Field Editor' window. The 'User Fields' tab is active, displaying a table of user fields. The 'xValidated' field is selected. The 'Field Properties' tab on the right shows the configuration for this field.

Bus. Object	Seq	Field	Disabled
Customer	0	ResidentialAddressFlag	<input type="checkbox"/>
Customer Addr	0	TEST_MAP_TO_UDEF1	<input type="checkbox"/>
Inventory Serial Number	0	xFAX	<input type="checkbox"/>
Item Master	0	xTest	<input type="checkbox"/>
Purchase Line Item	0	xValidated	<input type="checkbox"/>
Purchase Order			
Sales Document			
Sales Line Item			
Vendor			
Vendor Addr			

Field Properties:

Table Name: Customer Addr
Field Name: xValidated
Map To: [Dropdown]
Screen Label: Validated
Field Type: True/False Length: [Input]
Default Value: 0
Value Options: [Dropdown]

Options:

Field is Read Only Field is Required (Returns Only)
 Field is a File Attachment Field is Rich Text Memo
 Field is a Customer Lookup Field is an Image
 Field is a Hyperlink
Quick Report: [Input]

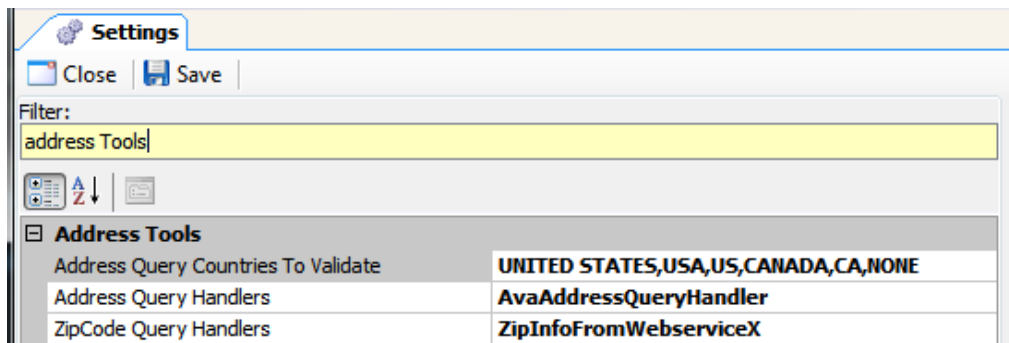
Note: There is a new setting in versions 4.0.738 and later (AvaTax Customer Usage Type Field) that allows adding a user defined field to store the usage type for the customer address. The field must first be created in the User Field Editor. Refer to SalesPad's [User](#)

[Defined Fields](#) document and contact SalesPad support for assistance in setting up this user field for use with SalesPad & AvaTax address validation.

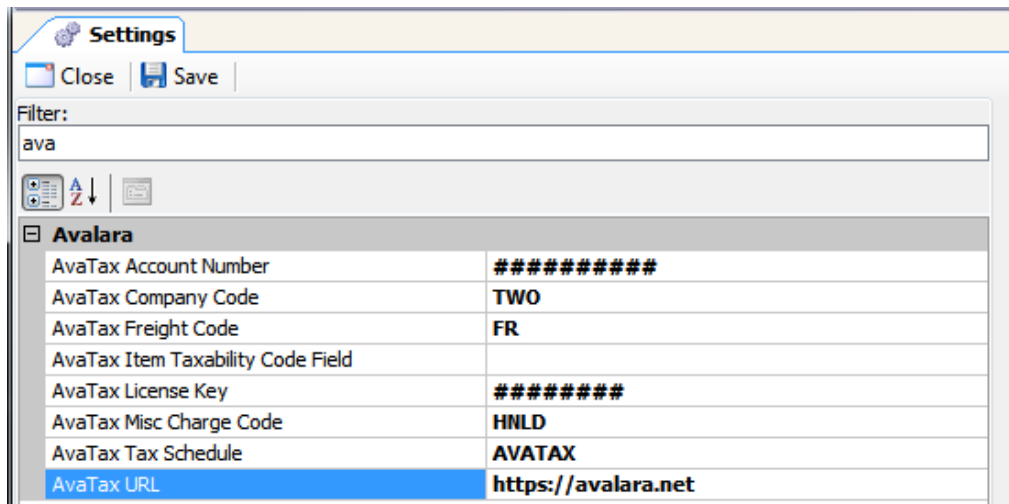
Settings

Follow the steps below in Settings

1. Filter to Address Tools and select *Address Query Handlers*
2. Turn on Address Query Handlers by entering *AvaAddressQueryHandler* in the *Address Query Handlers* field
3. Select *Address Query Countries to Validate* and specify the countries to validate an address with. For blank entries add the NONE setting in caps as shown below. Validation will only occur for the countries listed in *Address Query Countries To Validate*:



4. Next, filter to Avalara and fill out AvaTax connection settings with your account number, license key and URL, etc.



Note: There is a new setting in versions 4.0.738 and later (*AvaTax Customer Usage Type Field*) that allows adding a user defined field to store the usage type for the customer address. More settings and their definitions can be found in [SalesPad's Settings Guide](#), under Avalara.

Usage

The following screen shows an address before validation:

Address

Code: SALESPAD

Alt Comp. Name:

Contact Name:

Address: 3635 29th

Zip: 49512

City: Grand Rapids State: MI

Country: US

The address validation then suggests changes in red:

Validate Address

Original Address:

Address: 3635 29th

City: Grand Rapids

State: MI

Zip: 49512

Country: US

Suggested Address:

Address: 3635 29th St SE

City: Grand Rapids

State: MI

Zip: 49512-1811

Country: US

Cancel Use Original Use Suggestion

These changes can be overwritten by typing in the text boxes, or used as is. You can revert back and use the original unmodified address by clicking the **Use Original** button. Clicking **Use Original** or **Use Suggestion** will mark the address as Validated and cause the validation not to run next time.

The final result will reflect the changes you accepted, or the original address:

Address	
Code:	SALESPAD
Alt Comp. Name:	
Contact Name:	
Address:	3635 29th St SE
Zip:	49512-1811
City:	Grand Rapids
	State: MI
Country:	US