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Address Validation for AvaTax

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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, <u>please contact your Account Manager</u> 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.

User Field Editor						
🗂 Close 🛃 Save Update Database Design Layout Export Import						
📓 Bus. Objects	🗭 User Fields 🛛 🕈 New 🖊 Delete			Field Properties		
Bus. Object /	Seq /	Field	Disabled			
Customer	0	ResidentialAddressFlag		Table Name: Customer Addr		
Customer Addr	0	TEST_MAP_TO_UDEF1		Field Name: xValidated		
Inventory Serial Number	0	xFAX		Map To:		
Item Master	0	xTest		Screen Label: Validated		
Purchase Line Item	0	xValidated		Field Type: True/False v Length:		
Purchase Order				Default Value: 0		
Sales Document						
Sales Line Item				Value Options:		
Vendor				Options		
Vendor Addr				Field is Read Only Field is Required (Returns Only)		
				Field is a File Attachment		
				Field is a Customer Lookup Field is an Image		
				Field is a Hyperlink		
				Ouick Report:		

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 <u>User Defined Fields</u> 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:

Settings				
📑 Close 🛛 😓 Save				
Filter:				
address Tools				
Address Tools				
Address Query Countries To Validate	UNITED STATES, USA, US, CANADA, CA, NONE			
Address Query Handlers	AvaAddressQueryHandler			
ZipCode Query Handlers	ZipInfoFromWebserviceX			

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

	🕜 Settings			
	🛾 Close 🛛 🛃 Save			
Filt	er:			
av	a			
•				
Ξ	🗆 Avalara			
	AvaTax Account Number	#########		
	AvaTax Company Code	TWO		
	AvaTax Freight Code	FR		
	AvaTax Item Taxability Code Field			
	AvaTax License Key	#######		
	AvaTax Misc Charge Code	HNLD		
	AvaTax Tax Schedule	AVATAX		
	AvaTax URL	https://avalara.net		

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 <u>SalesPad's Settings Guide</u>, 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:

Original A	ddress:	Suggeste	d Address:
Address:	3635 29th	Address:	3635 29th St SE
City:	Grand Rapids	City:	Grand Rapids
State:	MI	State:	МІ
Zip:	49512	Zip:	49512-1811
Country:	US	Country:	US

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			