Avatax Setup

Cavallo Support - 2026-02-27 - Setup

Overview

SalesPad Deskop supports calculating taxes using Avalara's Avatax. With Avatax, you can automate your tax calculations and save time by not having to update and manage your tax schedules in GP, automatically keeping up to date with various tax regulations and changes across the world. This document covers the necessary setup to use Avatax with SalesPad.

Note: We also support Address Validation using Avatax. See more:
https://support.cavallo.com/kb/articles/address-validation-for-avatax

Setup

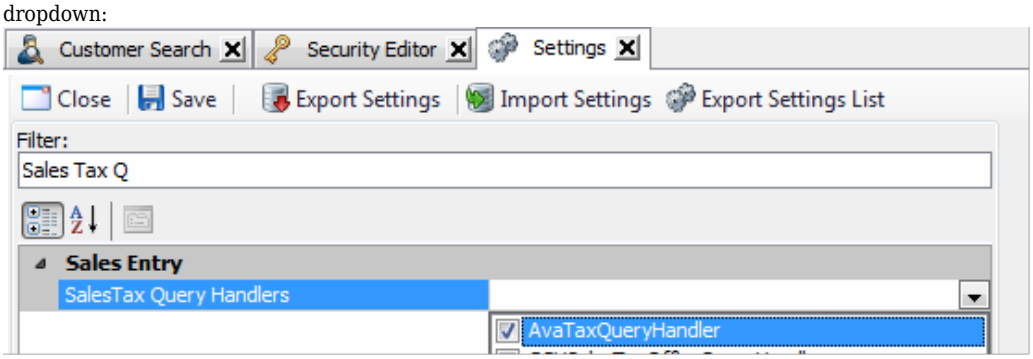
Microsoft Dynamics GP

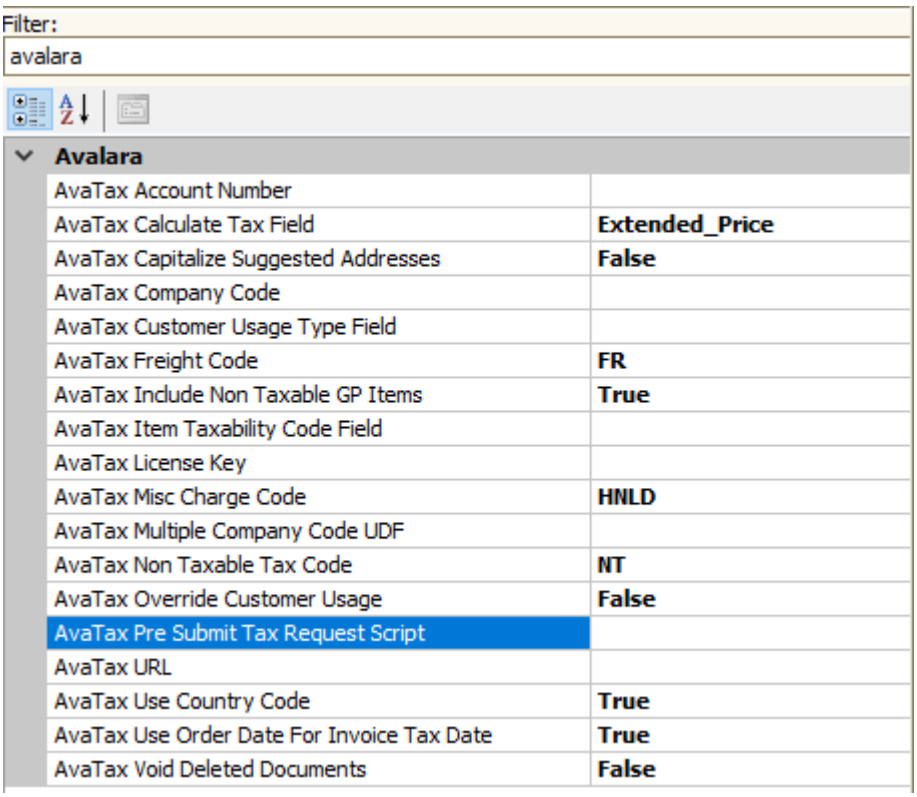
The customer must have a Sales Tax Schedule of AVATAX, and the Tax Schedule name needs to start with "AVATAX."

In order to calculate taxes on an item, the item must be set to Taxable or Based on Customer in Microsoft Dynamics GP. If the item is set to Non-Taxable, it will not be sent to Avatax.

SalesPad Settings

- In the SalesPad Settings module, filter to Sales Tax Q and select AvataxQueryHandler from the dropdown:



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Filter to Avalara and enter these settings:

- *AvaTax Account Number*: Login account number.
- *AvaTax Calculate Tax Field*: Line level field that will be used to pass in price. It can be a user-defined field.
- *AvaTax Capitalize Suggested Addresses*: Capitalize Suggested Addresses returned by Avalara address validation.
- *AvaTax Company Code*: Company code.
- *AvaTax Customer Usage Type Field*: Customer address user defined field that stores the usage type.
- *Avatax Environment Type*: Specify the AvaTax Environment Type. *(Added in version 5.6.3)*
- *AvaTax Freight Code*: Code that gets passed in for freight.
- *Avatax Include Non Taxable GP Items*: Non Taxable GP Items will be passed to Avatax as Non-taxable and the taxcode specified for AvaTax Non Taxable Tax Code
- *AvaTax Item Taxability Code Field*: Item Master User Defined field that stores the item taxability code.
- *AvaTax License Key*: License Key.
- *AvaTax Misc Charge Code*: Code that gets passed in for miscellaneous charge.
- *AvaTax Multiple Company Code UDF*: UDF that allows for sending a document to a specific company in the avatax console.

- *AvaTax Non Taxable Tax Code*: This is the Tax Code that will be sent to AvaTax for GP Items that are non-taxable

- *AvaTax Override Customer Usage*: Use the Sales Line Item Usage Type Field instead of the Customer Address Usage Type Field.

- *AvaTax Pre Submit Tax Request Script*: C# script that fires off before a tax request is made to Avatax for the document.

- *AvaTax Sales Document Fields to Check*: Specifies sales document fields to check for updated information before recalculating tax on save; if there is no change, taxes are not recalculated.

- *AvaTax Sales Line Item Field to Check*: Specifies sales line item fields to check for updated information before recalculating tax on save; if there is no change, taxes are not recalculated.

- *AvaTax URL*: After filling out the login information click on the Ellipsis Button (…) to validate the URL and account login information. Valid URLs are as follows

    - TEST: https://development.avalara.net/

    - LIVE: https://avatax.avalara.net/

- *AvaTax Use Country Code*: If True then a country code is required.

- *Avatax Use Order Date For Invoice Tax Date*: When enabled, sets the tax date to pull from the original order's date, not the invoice.

- *AvaTax Void Deleted Documents*: AvaTax call that sets the document status as Voided when deleting.

Avatax REST

As of SalesPad version **5.6.3**, Avatax REST functionality is supported. No additional setup is required to use this functionality when upgrading SalesPad from a prior version, or when setting up Avatax for the first time.

With SalesPad version 5.6.3 there is a new 'AvaTax Environment Type' setting that is used to change between AvaTax Production and Test environments. Additionally, the 'AvaTax URL' setting is still available for backward compatibility purposes.

NOTE: If you have an existing AvaTax Pre Submit Tax Request Script and are planning to upgrade to SalesPad 5.6.3 or newer, please contact our support team to assist you with updating the script to work with the new version.

Usage

Once proper setup is complete, during sales document entry, SalesPad will send sales line information to Avatax when saving, and calculated tax amount information will be returned on the document in the Tax field. It is possible to set up workflow and a run script that will calculate taxes only when needed. Returns created from posted invoices will calculate taxes based on the posted invoice date. Additional tax details are stored in the spAvalaraTaxLine and spAvalaraTaxLineDetail tables. (Also see: Address Validation for AvaTax).

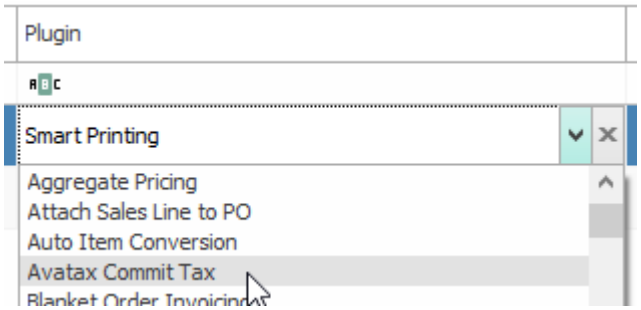
Regardless of whether or not there are fields specified in the AvaTax Sales Document Fields To Check or AvaTax Sales Line Item Fields To Check settings, the document will always have taxes calculated on it on the first save. If there are fields specified in these settings, AvaTax will still calculate tax even if their values haven't been updated on the first save. After the first save, if there are no fields selected in these settings, then AvaTax will recalculate after every save. If there is one or more field specified in the Sales Document Setting, and nothing selected in the AvaTax Sales Document Fields To Check setting, then at least one of the specified sales document fields must be updated in order to recalculate taxes on save.

If there is one or more fields specified in the AvaTax Sales Line Item Fields To Check setting and nothing

selected in the AvaTax Sales Document Fields To Check setting, then at least one of the specified sales line fields must be updated to recalculate taxes on save. If there are one or more fields specified in both settings, at least one of the fields specified in either setting must be modified in order for AvaTax to recalculate taxes.

Commit Tax

The Commit Tax plugin for Avatax may be triggered via the Actions dropdown on a Sales Document or automatically via Workflow. This process essentially posts the tax to Avalara, similar to what happens when you post the invoice in GP. Running this plugin in SalesPad is not required and usage will be based on your business processes.



Note: As of version 4.6.0.7 of SalesPad, the customer purchase order number will import into Avatax from the sales document in SalesPad.