

Sales Tax Set Up

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This guide is intended for Duggal Visual Solutions general users specifically. Information herein may contain customizations and particulars specific to the Duggal aACE system. Click this [link](https://aace5.knowledgeowl.com/help) (<https://aace5.knowledgeowl.com/help>) for the General aACE Software aACE 5 Knowledge Base.

Settings to Capture Sales Tax Appropriately in aACE

Steps for AvaTax Integration

aACE+ Avalara AvaTax integration addresses your sales tax challenges with a cloud-based service that calculates sales and use tax, manages exemption certificates, files returns, and remits payments across North America and beyond.

For more in depth information on AvaTax integration with aACE, go to

<http://aace5.knowledgeowl.com/help/setting-up-avatax> (<http://www.google.com/url?q=http%3A%2F%2Faace5.knowledgeowl.com%2Fhelp%2Fsetting-up-avatax&sa=D&sntz=1&usg=AOvVaw2Tq12SAFMx9U4mXpNvzbtV>) . For

your aACE+ AvaTax integration, proceed with the following steps:

1. Create your AvaTax account (*done*)
2. Configure aACE accounting preferences (*done*)
3. Configure aACE office settings
 1. AvaTax Co Code set to 'DEFAULT' for all offices (This coincides with our sandbox account. **We will need to set this to 'DVS' for the live system.**)
4. Configure aACE tax profiles - (*see below for Duggal-specific details*)
5. Configure aACE line item code settings
 1. All Line Item Codes have Shipping Enabled (*done*)
 2. Presently Line Item Codes ILMA and LB223 need to have Enable Avatax checked. All others are enabled.
 3. The Optional Code is blank for all Line Item Codes except six installation-related codes populated with SI020000:

Record: 6 of 6

Line Item Codes *Unsorted*

Type	Code	Description	Rec Type	Dept	Task Group
> INSTL- 02 DUGGAL	DSI	Installation	ASMBL	490-1	Installation
> VI- 01 VENDOR	VI	OS -Vendor Installation	ASMBL	490-1	Installation
> INSTL- 02 DUGGAL	site	Site Survey	ASMBL	490-1	Installation
> VI- 01 VENDOR	Vsite	OS -Vendor Site Survey	ASMBL	490-1	Installation
> INSTL- 02 DUGGAL	MVI	Manhattan Vendor	ASMBL	490-1	Installation
> INSTALL	INSTALLVAL	Install Value	ITM		

List Totals

Preferences

- Show in entry list.** Causes the code to appear in order, estimate, quote, and invoice value lists.
- Enforce rate card billing.** Prevents users from changing the price at entry.
- Enable AvaTax.** Sends order and invoice items to AvaTax. Optional code:
- Send financial oversight a notification if sold with a margin less than:**
- Split** **of revenue with department:**
- Split revenue account:**

Note: The purpose of this process is to help ensure you are *not* charged for unneeded tax data requests. Avalara charges for each request that is submitted. If a certain office, line item code, or tax profile should not be taxed, there is no need to request tax data for it. The time you invest in configuring your AvaTax integration can reduce your expenses.

Configure Tax Profiles

Proposal

1. Create new Tax Profile: **AVA**. This Profile will be Avatax Enabled and set as the Default.
2. Keep active Tax Profile **OUT**. This profile can be associated to all Postal Codes within the states that Duggal does NOT have nexus in. When one of these postal codes is used, no calculations are submitted to Avalara.
3. Keep active Tax profile **RES00**. used for Resale/ Exempt Companies. When used, no calculations are submitted to Avalara.

The **Tax Profiles** that are to use Avatax to calculate rates should have the **AvaTax** checkbox checked.

Tax Profile: AvaTax (AVA) ACTIVE

Tax Profile Details Notices | Emails | Docs

General Info Default Use Tax EU **AvaTax** Description

Start Date: End Date:

Tax Setup

Tax	Label	GL Account
Tax 1	<input type="text"/>	<input type="text"/>
Tax 2	<input type="text"/>	<input type="text"/>
Tax 3	<input type="text"/>	<input type="text"/>
Tax 4	<input type="text"/>	<input type="text"/>

Default Rates

Line Item Type:	Rate	Rate	Rate
Item (Products)	<input type="text"/>	<input type="text"/>	<input type="text"/>
Expense	<input type="text"/>	<input type="text"/>	<input type="text"/>
Time (Service)	<input type="text"/>	<input type="text"/>	<input type="text"/>
Other	<input type="text"/>	<input type="text"/>	<input type="text"/>

Exceptions

Line Item Code	Code Description
<input type="text"/>	<input type="text"/>

Other **Profiles** may be kept in use and NOT use AvaTax to determine sales tax rates. If AvaTax is not checked, the **Profile's** default rate logic is used. If applied in an Order, the default profile rate will be applied.

Tax Profile: CA: Albany (01001) ACTIVE

Tax Profile Details Notices | Emails | Docs

General Info Default Use Tax EU **AvaTax** Description

Start Date: End Date:

Description: Alameda County

Tax Setup

Tax	Label	GL Account
Tax 1	State	12685000001 Sales Tax Payable-CA
Tax 2	<input type="text"/>	<input type="text"/>
Tax 3	<input type="text"/>	<input type="text"/>
Tax 4	<input type="text"/>	<input type="text"/>

Default Rates

Line Item Type:	State	Rate	Rate
Item (Products)	9.7500%	<input type="text"/>	<input type="text"/>
Expense	9.7500%	<input type="text"/>	<input type="text"/>
Time (Service)	9.7500%	<input type="text"/>	<input type="text"/>
Other	0.0000%	<input type="text"/>	<input type="text"/>

Exceptions

Line Item Code	Code Description	State
<input type="text"/>	<input type="text"/>	<input type="text"/>

RESALE/EXEMPT PROFILE (ZERO RATE) (<https://www.google.com/url?q=https%3A%2F%2Fsites.google.com%2Fduggal.com%2Fduggal-wiki%2Forderwriting%2Fsales-tax%3Fauthuser%3D0%23h.p.6wBY2A7Z7yF-&sa=D&sentz=1&usg=AOvVaw1F-9tyCZ111MduRIRZkic7>)

If a Company has a Tax profile assigned to it, the profile will override any default logic upon creating the Order. Setting a Company record's Tax Profile should be limited to Resale and Exempt clients. The documentation to set these profiles is managed in the Accounting Department.

OUT OF STATE PROFILE (ZERO RATE)

If a zip code not in New York or California is referenced in an Order, the related Sales Tax is calculated using the system default Tax Profile: OUT - "OUTOFSTATE". The rate set in this Profile is zero, so no tax is added to the order.

EXCEPTIONS

Exceptions in Tax Profiles are Line Item Codes that are taxed differently than the "default rate" of that Profile. **Avatax plus the Avatax code assigned to the Line Item Code should replace this for Avatax enabled Profiles.** Fixed Rate Profiles still require this table to be entered and kept up-to-date.

Tax Profile: DEFAULT TAX PROFILE (NYC) (DEF) ACTIVE ●

Tax Profile Details Notices ! Emails ✉ Docs 📄

General Info Default Use Tax EU AvaTax

Description

Tax Setup

Label	GL Account
Tax 1 State	> 126800000001 Sales Tax Payable-NY
Tax 2	
Tax 3	
Tax 4	

Default Rates

Line Item Type:	State		
Item (Products)	8.8750%		
Expense	8.8750%		
Time (Service)	8.8750%		
Other	0.0000%		

Exceptions

Line Item Code	Code Description		State	
ADJ	Adjustments A/R dept. only	✳	8.8750%	✕
> ADJADJ	Adjustments	✳	8.8750%	✕
> ADJNT	Adjustments A/R dept. only NON TAXABLE	✳	0.0000%	✕
> discount	DO NOT USE. Discount A/R dept. only!!!!!!!!!!!!	✳	0.0000%	✕
> FCT	Finance Charge	✳	0.0000%	✕
> TAXADJ	TAX ADJ.	✳	0.0000%	✕
> trade	Trade A/R dept. use only	✳	0.0000%	✕
WIRE	Wire Transfer Fee	✳	0.0000%	✕
> XCOLLECT	Collection A/R dept. use only	✳	0.0000%	✕

Legacy Tax Profiles

FIXED RATE PROFILES

Prior to AvaTax being activated, the fixed rate Tax Profiles: DEF, NY Counties, and CA zip codes/counties were used. If a Profile was assigned to an Order or Order Line Item, tax would be calculated based on the fixed rate in the Profile. This will still work and if one of these Profiles is used, it will override any default or avatax logic.

With AvaTax, these are no longer required and should be avoided except in special

circumstances.

Record: 1854 of 1925

Tax Profile: DEFAULT TAX PROFILE (NYC) (DEF)

Tax Profile Details

General Info Default Use Tax EU **AvaTax** **Description**

Start Date: 01/01/10 End Date: 12/31/10

Tax Setup

Label	GL Account
Tax 1 State	> 12680000001 Sales Tax Payable-NY
Tax 2	
Tax 3	
Tax 4	

Default Rates

Line Item Type:	State
Item (Products)	8.8750%
Expense	8.8750%
Time (Service)	8.8750%
Other	0.0000%

Tax Profile: CA: Shingle Springs (9998SH)

Tax Profile Details

General Info Default Use Tax EU AvaTax **Description**

Start Date: End Date:

El Dorado County

Tax Setup

Label	GL Account
Tax 1 State	> 12685000001 Sales Tax Payable-CA
Tax 2	
Tax 3	
Tax 4	

Default Rates

Line Item Type:	State
Item (Products)	7.2500%
Expense	7.2500%
Time (Service)	7.2500%
Other	0.0000%

Record: 1852 of 1925

Tax Profile: Central Valley NY (CV)

Tax Profile Details

General Info Default Use Tax EU AvaTax **Description**

Start Date: End Date:

Tax Setup

Label	GL Account
Tax 1 STATE	> 12680000001 Sales Tax Payable-NY
Tax 2	
Tax 3	
Tax 4	

Default Rates

Line Item Type:	STATE
Item (Products)	8.1300%
Expense	8.1300%
Time (Service)	8.1300%
Other	0.0000%

Any record linked to a tax profile that has the AvaTax flag marked will be processed through AvaTax. Make sure the tax profile is linked to an appropriate GL Account to receive the tax values that come back from AvaTax.

The simplest implementation is often to have a single, default tax profile with AvaTax enabled, but additional tax profiles can be useful if:

- You want the tax values calculated by AvaTax to be tracked in the general ledger (GL) using various criteria. For example, you may want a different GL Account for taxes for each state you do business in. This would require [setting up a tax profile](https://aace5.knowledgeowl.com/help/setting-up-tax-profiles) (<https://aace5.knowledgeowl.com/help/setting-up-tax-profiles>) for each of these states and connecting those Profiles with that state's Postal Codes. (See below.)

- You want the AvaTax tax calculation to be *disabled* for a certain group of companies, such as jurisdictions for which your AvaTax account is not set up to calculate.

TAX PROFILES AND POSTAL CODES (optional set-up)

Tax Profiles can be added to an Order automatically based on the zip code used in the ShipTo Address.

Postal Codes are entered into the aACE database. Each postal code can be associated to a Tax Profile.

aACE can use this relationship to determine if Avatax is called for a Sales Tax Rate, or a Profile's set rate is used instead.

The AVA Tax Profile has the Avatax checkbox checked. This means when an Order references this Profile, Avatax is called to determine the appropriate Sales Tax Rate (based on the location of delivery and line item code categorization).

Other Tax Profiles that do NOT have the Avatax checkbox checked use their default rates instead of calling Avatax.

Record: 1856 of 1925

Tax Profile: DEFAULT (NY) (DEFNY)

Tax Profile Details

General Info Default Use Tax EU **AvaTax** **Description**

Start Date: End Date:

Tax Setup

Label	GL Account
Tax 1 STATE	> 126800000001 Sales Tax Payable-NY
Tax 2	
Tax 3	
Tax 4	

Default Rates

Line Item Type:	STATE
Item (Products)	0.0000%
Expense	0.0000%
Time (Service)	0.0000%
Other	0.0000%