



# **Auto Tax Calculator**



## **User Manual**

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# Introduction

The Auto Tax Calculator Business App provides the following functionality:

- Create Tax Schedules and Tax Details specific to auto calculate taxes
- Use with Dynamics 365 for Sales Opportunities, Quotes, Orders, and Invoices
- Use with Inogic Recurring Billing Manager/Subscription Management Sales Documents
- Integrates with Avalara AvaTax

# Administrator Section

- Security
- Configuration
- InogicLicense
- Inogic Process
- Inogic Setting
- System Message
- System Message Log
- System Message Translation
- Metadata Entity
- Metadata Attribute
- Metadata Advanced Find
- Metadata Workflow
- Document Number Lock

# Security

## Description

Two roles are added with Auto Tax Calculator. The Auto Tax Calculator Admin role and the Tax Processing User role. Any user who will be using Auto Tax Calculator should be assigned to one of these roles as this will drive the ability to see the Auto Tax Calculator forms where needed.

### Default Auto Tax Calculator Admin:

 **Security Role: Tax Processing Admin** Working on solution: Default Solution

Entity	Create	Read	Write	Delete	Append	Append To	Assign	Share
Attachable Report	●	●	●	●	●	●	●	●
Customer Address	●	●	●	●	●	●	●	●
Document Number Lock	●	●	●	●	●	●	●	●
Document Tax	●	●	●	●	●	●	●	●
Document Type	●	●	●	●	●	●	●	●
Filter	○	○	○	○	○	○	○	○
Metadata Advanced Find	●	●	●	●	●	●		
Metadata Attribute	●	●	●	●	●	●		
Metadata Entity	●	●	●	●	●	●		
Metadata Workflow	●	●	●	●	●	●		
Post Configuration	○	○	○	○	○	○		
Post Rule Configuration	○	○	○	○	○	○		
Profile Album	○	○	○	○	○	○	○	○
Rockton License	●	●	●	●	●	●		
Rockton Process	●	●	●	●	●	●	●	●
Rockton Setting	●	●	●	●	●	●	●	●
Sales Document	●	●	●	●	●	●	●	●
Sales Document Line	●	●	●	●	●	●	●	●
System Message	●	●	●	●	●	●		
System Message Log	●	●	●	●	●	●	●	●
System Message Translation	●	●	●	●	●	●		
Tax Detail	●	●	●	●	●	●	●	●
Tax Schedule	●	●	●	●	●	●	●	●
Wall View	○	○	○	○	○	○		
Workflow Launcher	●	●	●	●	●	●	●	●
Workflow Trigger	●	●	●	●	●	●		

**Key**  
○ None Selected    ● User    ● Business Unit    ● Parent: Child Business Units    ● Organization

## Default Auto Tax Calculator User:



### Security Role: Tax Processing User

Working on solution: Default Solution

Entity	Create	Read	Write	Delete	Append	Append To	Assign	Share
Attachable Report	👤	👤	👤	👤	👤	👤	👤	👤
Customer Address	👤	👤	👤	👤	👤	👤	👤	👤
Document Number Lock	👤	👤	👤	👤	👤	👤	👤	👤
Document Tax	👤	👤	👤	👤	👤	👤	👤	👤
Document Type	👤	👤	👤	👤	👤	👤	👤	👤
Filter	🚫	🚫	🚫	🚫	🚫	🚫	🚫	🚫
Metadata Advanced Find	👤	👤	👤	👤	👤	👤		
Metadata Attribute	👤	👤	👤	👤	👤	🚫		
Metadata Entity	👤	👤	👤	👤	👤	👤		
Metadata Workflow	👤	👤	👤	👤	👤	👤		
Post Configuration	🚫	🚫	🚫	🚫	🚫	🚫		
Post Rule Configuration	🚫	🚫	🚫	🚫	🚫	🚫		
Profile Album	🚫	🚫	🚫	🚫	🚫	🚫	🚫	🚫
Rockton License	👤	👤	👤	👤	👤	👤		
Rockton Process	👤	👤	👤	👤	👤	👤	👤	👤
Rockton Setting	👤	👤	👤	👤	👤	👤	👤	👤
Sales Document	👤	👤	👤	👤	👤	👤	👤	👤
Sales Document Line	👤	👤	👤	👤	👤	👤	👤	👤
System Message	👤	👤	👤	👤	👤	👤		
System Message Log	👤	👤	👤	👤	👤	👤	👤	👤
System Message Translation	👤	👤	👤	👤	👤	👤		
Tax Detail	👤	👤	👤	👤	👤	👤	👤	👤
Tax Schedule	👤	👤	👤	👤	👤	👤	👤	👤
Wall View	🚫	🚫	🚫	🚫	🚫	🚫		
Workflow Launcher	👤	👤	👤	👤	👤	👤	👤	👤
Workflow Trigger	👤	👤	👤	👤	👤	👤		

#### Key

🚫 None Selected    👤 User    🏢 Business Unit    🌳 Parent: Child Business Units    🟢 Organization

## View or Edit Auto Tax Calculator Security Roles

1. Open the Security entity under **Dynamics 365 | Sales | Settings | Security**.
2. Click **Security Roles**.
3. Open the **Auto Tax Calculator Admin** or **Auto Tax Calculator User** role.
4. Click the **Custom Entities** tab.
5. Make any needed changes.
6. Click **Save and Close**.

## Assign Auto Tax Calculator Security Role

1. Open the User entity under **Dynamics 365 | Sales | Settings | Security**.
2. Click **Users**.
3. Open the User to whom you wish to assign the **Auto Tax Calculator Admin** or **Auto Tax Calculator User** role.
4. Click **Manage Roles** button.
5. Mark **Auto Tax Calculator Admin** or **Auto Tax Calculator User** and then click **OK**.

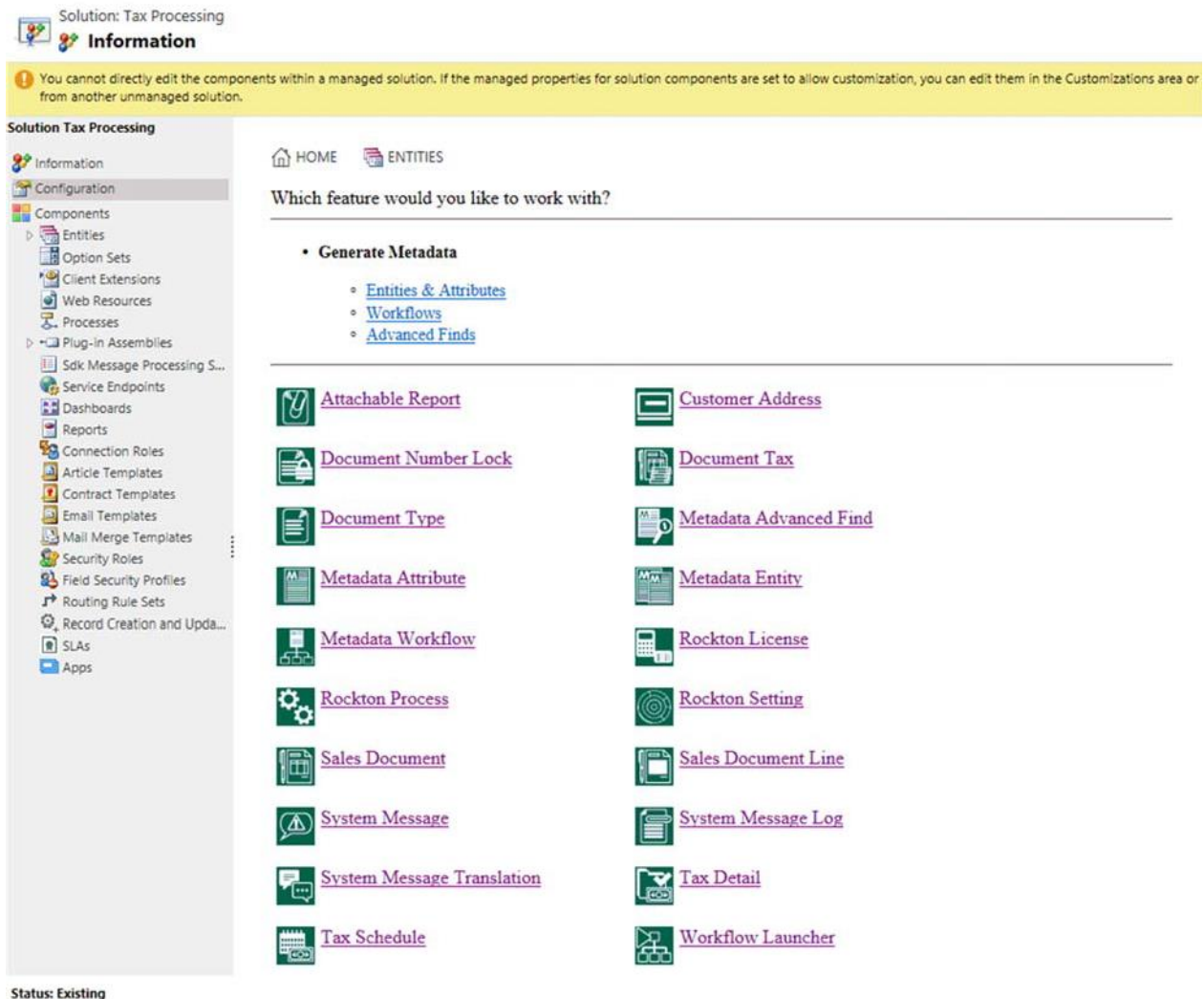


# Configuration

## Description

The Configuration page is available from within the Auto Tax Calculator Solution. The Home button displays the product version and new information. You can Generate Metadata and access the Auto Tax Calculator entities by clicking the Entities button.

The entities listed here may also be accessed using the Advanced Find.



## Open Configuration Page

1. Open the Configuration Page under **Dynamics 365 | Sales | Settings | Solutions**.
2. Open the **Auto Tax Calculator** solution.
3. Click **Configuration**.

## Generate Metadata

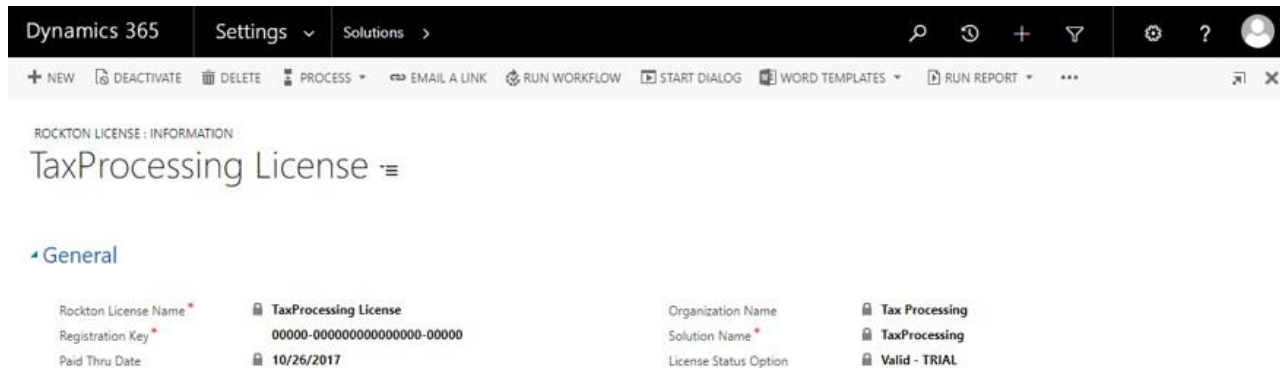
The Generate Metadata process will add custom Entities & Attributes, Workflows, and Advanced Finds to be viewable in lookups. If something is not appearing in a lookup, you will need to Generate Metadata.

1. Open the Configuration Page under **Dynamics 365 | Sales | Settings | Solutions**.
2. Open the **Auto Tax Calculator** solution.
3. Click **Configuration**.
4. Click the hyperlink for the Metadata you wish to generate.

# Inogic License

## Description

The Inogic License entity stores your Registration Key for Auto Tax Calculator or any other Inogic products purchased for Dynamics 365. When Auto Tax Calculator is installed a Registration Key is automatically generated and is valid for 30 days from the install date. When the product is purchased, a new license will be provided. Use this entity to enter the license information. If a message is ever received that the product is not registered, you may view this window to find out why it is no longer valid by looking at the License Status Option field.



The screenshot shows the Dynamics 365 user interface for the 'TaxProcessing License' entity. The top navigation bar includes 'Dynamics 365', 'Settings', and 'Solutions'. Below the navigation bar is a toolbar with various actions like '+ NEW', 'DEACTIVATE', 'DELETE', 'PROCESS', 'EMAIL A LINK', 'RUN WORKFLOW', 'START DIALOG', 'WORD TEMPLATES', 'RUN REPORT', and a search icon. The main content area is titled 'ROCKTON LICENSE : INFORMATION' and 'TaxProcessing License'. Under the 'General' tab, the following fields are visible:

Rockton License Name *	TaxProcessing License	Organization Name	Tax Processing
Registration Key *	00000-0000000000000000-00000	Solution Name *	TaxProcessing
Paid Thru Date	10/26/2017	License Status Option	Valid - TRIAL

## View Inogic License

1. Open the Inogic License entity under **Dynamics 365 | Sales | Settings | Solutions**.
2. Open the **Auto Tax Calculator** solution.
3. Click **Configuration** from the list and then click the **Entities** button.
4. Click **Inogic License**.
5. Open the license you wish to view.

## Inogic License Fields

### License Status Option

Displays the status of the Inogic License. The following options are available:

- Valid
- Valid - TRIAL
- Invalid - Registration Key isBlank
- Invalid - Registration Key isInvalid
- Invalid - Organization Name is invalid for the given Registration Name
- Invalid - Solution Name is invalid for the given Registration Key
- Invalid - Paid Thru Date is beforeToday

### Organization Name

The unique name of the Dynamics 365 organization.

**Paid Thru Date**

The expiration date of the Inogic License.

**Registration Key**

The unique key value provided by Inogic to enable Auto Tax Calculator.

**Inogic License Name**

The name of the Inogic License.

**Solution Name**

The name of the Dynamics 365 solution.

# Inogic Process

## Description

The Inogic Process entity is used to queue, trigger, and log business processes for Inogic products. These processes will run in the background and are an internal mechanism to allow the firing of custom processes. Typically, a user should not need to access this window.

The screenshot shows the Dynamics 365 interface for the 'Generate Metadata Attributes' process. The top navigation bar includes 'Dynamics 365', 'Settings', and 'Solutions'. Below the navigation bar is a toolbar with buttons for '+ NEW', 'DEACTIVATE', 'DELETE', 'PROCESS', 'ASSIGN', 'SHARE', 'EMAIL A LINK', 'RUN WORKFLOW', 'START DIALOG', and a menu icon. The main content area is titled 'ROCKTON PROCESS : INFORMATION' and 'Generate Metadata Attributes'. A 'General' tab is selected, showing the following fields:

Rockton Process Name *	Generate Metadata Attributes	Owner *	System Administrator
Process Status Option	Completed	Processed Count	--
Start Date Time	8/23/2017 7:52 AM	Error Count	--
End Date Time	8/23/2017 7:52 AM	Success Count	--
Parameters	<parameters> <parameter> <name> metadataEntityName </name> <value> entitlementtemplatechannel </value> </parameter> </parameters>		
Output Parameters	--		
Detailed Information	--		

## View a Inogic Process

1. Open the Inogic License entity under **Dynamics 365 | Sales | Settings | Solutions**.
2. Open the **Auto Tax Calculator** solution.
3. Click **Configuration** from the list and then click the **Entities** button.
4. Select **Inogic Process**.
5. Open the record you wish to view.

## Inogic Process Fields

### Detailed Information

Additional information to further define the entity or process, such as the results returned or error messages.

**End Date Time**

Date and time in which the process ended or failed.

**Error Count**

Number of records processed that contain errors.

**Output Parameters**

Text field used for an XML string of additional information returned from the Inogic Process.

**Parameters**

Text field used for an XML string of additional information returned from the Inogic Process.

**Process Status Option**

Indicates the status of the Inogic Process. Status options are Queued, Processing, or Completed.

**Processed Count**

Indicates the number of records queued to process before the Inogic Process begins.

**Inogic Process Name**

Descriptive name for the process that will launch or trigger a specific process.

**Start Date Time**

Date and time in which the process was initiated.

# Inogic Setting

## Description

The Inogic Setting entity stores the system settings for the Inogic products. A record will exist by default and changes may be made as needed. If an additional record is created, the new record will be saved and any blank fields will be updated with the values from the previous record.

A section for Auto Tax Calculator was added for Avalara integration. If you will be using Avalara you will need to populate the fields in the Auto Tax Calculator section and the External Integrations section. The information will be provided to you by Avalara.

The screenshot displays the Dynamics 365 interface for the 'Inogic Setting' entity. The record is titled 'Rockton Setting' and is owned by 'System Administrator'. The 'General' tab is selected, showing the 'Rockton Setting Name' as 'Rockton Setting'. Below this, the 'Reporting' and 'External Integrations' tabs are visible. The 'External Integrations' tab is active, showing the 'CRM Credentials' section with fields for 'CRM Discovery Service URL', 'CRM Organization Service URL', 'CRM Service Account Domain', and 'CRM Service Account Password'. The 'Rockton Services' section is also visible, showing 'Rockton WCF UserName' as 'TestUser' and 'Rockton WCF Password' as '00000xxxx00000xxxx00000xxxx'. The 'Tax Processing' tab is also visible, showing fields for 'Avalara License', 'Avalara Company Code', 'Avalara URL', 'Enable Avalara Address Validation', 'Rockton WCF Taxes Service URL', 'Avalara Account', 'Avalara Profile Name', 'Avalara Via URL', and 'Avalara Default Ship From Address'.

Field	Value
Rockton Setting Name	Rockton Setting
Owner	System Administrator
CRM Discovery Service URL	http://00.00.00.00/XRMServices/xxxx/Test.svc
CRM Organization Service URL	http://00.00.00.00/TaxProcessing/XRMServices/xxxx/Test.svc
CRM Service Account Domain	Connect
CRM Service Account Password	00000xxxx00000xxxx00000xxxx00000xxxx
CRM Service Account Username	Administrator
Rockton WCF UserName	TestUser
Rockton WCF Password	00000xxxx00000xxxx00000xxxx
Avalara License	0000xxxx00000
Avalara Company Code	Test Company
Avalara URL	Avalara.com
Enable Avalara Address Validation	No
Rockton WCF Taxes Service URL	Avalara.com
Avalara Account	Testxxxx000
Avalara Profile Name	Test
Avalara Via URL	avalara.com
Avalara Default Ship From Address	Main

## View or Edit Auto Tax Calculator Inogic Settings

1. Open the Inogic Settings entity under **Dynamics 365 | Sales | Settings | Solutions**.
2. Open the **Auto Tax Calculator** solution.
3. Click **Configuration** from the list and then click **Entities**.
4. Select **Inogic Settings**.
5. Open the Inogic Setting record.
6. Expand the Auto Tax Calculator section.

**Note:** The existing Inogic Setting record may not be deleted.

# Inogic Setting Fields

## General

### **Owner**

System selected based on the user who initially created the record.

### **Inogic Setting Name**

Descriptive name of the Inogic Setting record.

## Reporting

### **RES Domain**

String value that corresponds to the Reporting Execution Service domain. It is used for generating SSRS reports with workflows. This field will be encrypted.

### **RES Password**

String value that corresponds to the Reporting Execution Service password. It is used for generating SSRS reports with workflows. This field will be encrypted.

### **RES URL**

String value that corresponds to the Reporting Execution Service URL. It is used for generating SSRS reports with workflows. This field will be encrypted.

### **RES User Name**

String value that is the Reporting Execution Service user name. It is used for generating SSRS reports with workflows. This field will be encrypted.

### **Inogic PDF Converter Service URL**

The URL for Inogic's web service which performs the conversion of the Word Template to a PDF. This information will be provided by Inogic.

## External Integrations

### **CRM Discovery Service URL**

The URL for the Discovery Service of the CRM system.

### **CRM Organization Service URL**

The URL for the Organization Service of the CRM system.

### **CRM Service Account Domain**

The Domain of the Service Account for CRM.

### **CRM Service Account Password**

The Password of the Service Account for CRM. This field will be encrypted.

### **CRM Service Account UserName**

The UserName of the Service Account for CRM.

### **Inogic WCF UserName**

UserName to use when connecting to the Inogic WCF Services. This is the web service Inogic uses and used by external integrations. This information will be provided by Inogic.



**Inogic WCF Password**

Password to use when connecting to the Inogic WCF Services. This is the web service Inogic uses and used by external integrations. This information will be provided by Inogic.

**Auto Tax Calculator****Avalara Account**

Account ID assigned by Avalara when you register for their product.

**Avalara Company Code**

Identifies the company that helps Avalara access your company's tax profile.

**Avalara Default Ship From Address**

The default Ship From address of the customer to use in calculating taxes if an address does not exist on the record where taxes are being calculated.

**Avalara License**

The license key assigned by Avalara for their product. If this field is populated, Auto Tax Calculator knows to use Avalara instead of the Tax Schedules on the transaction lines.

**Avalara Profile Name**

A profile name assigned by Avalara when registered for their service.

**Avalara URL**

URL to the Avalara Web Service used for Auto Tax Calculator.

**Avalara Via URL**

URL to the Avalara Web Service used for Auto Tax Calculator.

**Enable Avalara Address Validation**

Flag to turn Tax Address Validation on or off. This will be No unless you have registered for Avalara.

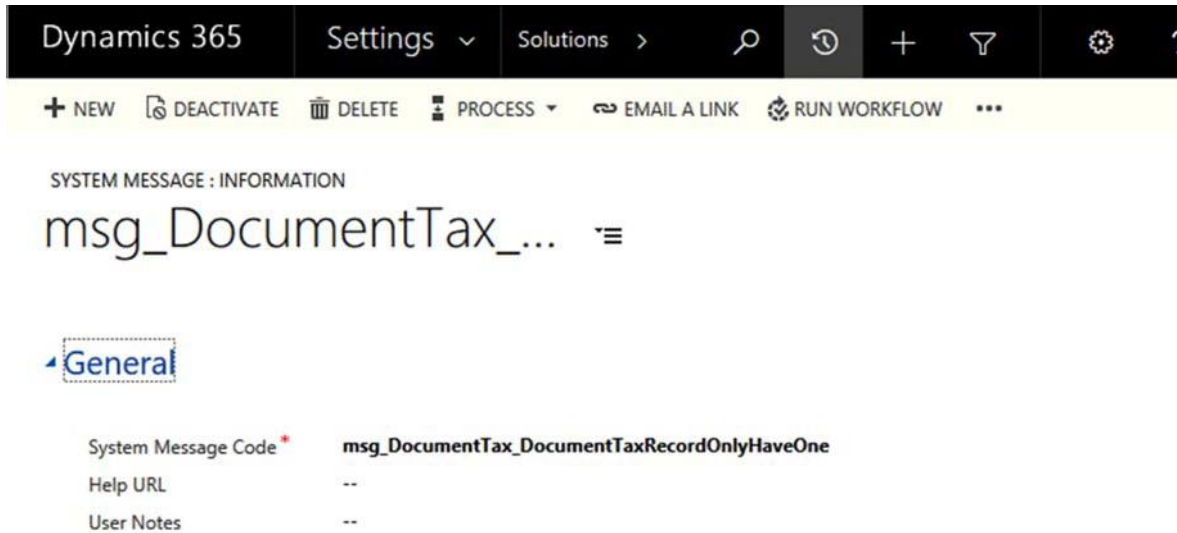
**Inogic WCF Taxes Service URL**

The URL of the Inogic WCF Service that communicates with Avalara to perform Auto Tax Calculator. This information will be provided by Inogic.

# System Message

## Description

The System Message entity stores the system message codes. This ensures messages will prompt users when needed. System Messages may be deleted; however, it is recommended you not delete them. If it is deleted, the error message will display a generic message instead of an error message that may be helpful in explaining what happened. Typically, a user should not need to access this window.



## View a System Message

1. Open the System Message entity under **Dynamics 365 | Sales | Settings | Solutions**.
2. Open the **Auto Tax Calculator** solution.
3. Click **Configuration** from the list and then click the **Entities** button.
4. Click **System Message**.
5. Open the System Message you wish to view.

## System Message Fields

### Help URL

Link to additional help resources.

### System Message Code

The code for the System Message. It is a unique code that is used to translate the System Message.

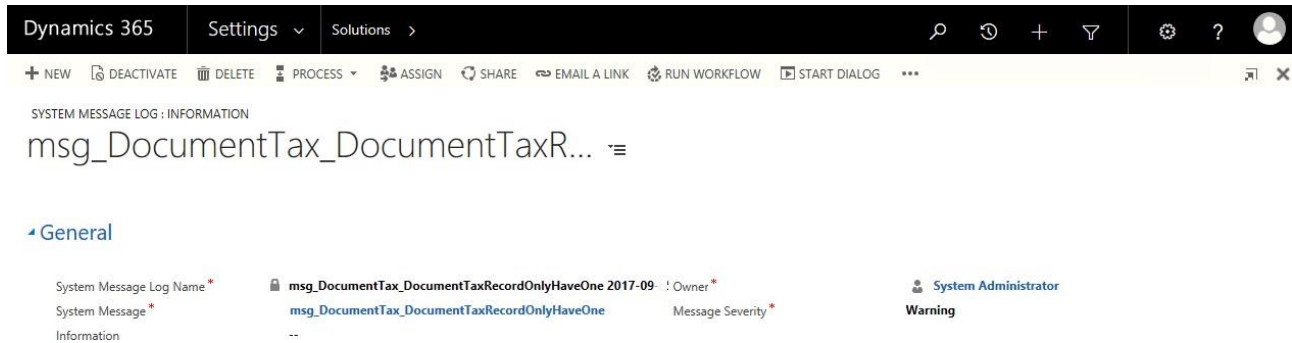
### User Notes

Additional notes used for tracking.

# System Message Log

## Description

The System Message Log entity tracks the history of system messages that have generated throughout the system. It includes additional information such as troubleshooting data and Connections to related entities. Typically, a user should not need to access this window.



## View System Message Log

1. Open the System Message Log entity under **Dynamics 365 | Sales | Settings | Solutions**.
2. Open the **Auto Tax Calculator** solution.
3. Click **Configuration** from the list and then click the **Entities** button.
4. Click **System Message Log**.
5. Open the System Message Log you wish to view.

## Delete System Message Log

1. Open the System Message Log entity under **Dynamics 365 | Sales | Settings | Solutions**.
2. Open the **Auto Tax Calculator** solution.
3. Click **Configuration** from the list and then click the **Entities** button.
4. Click **System Message Log**.
5. Select the record you wish to remove.
6. Click **Delete**.

## System Message Log Fields

### Information

Technical information from the developer to assist in troubleshooting the error or warning.

### Message Severity

Displays the severity level of the message, whether it is Information, Warning, or an error.

**System Message**

The System Message Code associated the System Message.

**System Message Log Name**

System generated by concatenating the System Message Code, the current date and time, and the message text from the System Message Translation.

# System Message Translation

## Description

The System Message Translations entity is used to track and create the details for all System Messages that may occur in the system. This includes the translation of each of the system messages into multiple languages as needed. Typically, a user should not need to access this window.

The screenshot shows the Dynamics 365 interface for the System Message Translation entity. The top navigation bar includes 'Dynamics 365', 'Settings', and 'Solutions'. Below this is a toolbar with various actions like '+ NEW', 'DEACTIVATE', 'DELETE', 'PROCESS', 'EMAIL A LINK', 'RUN WORKFLOW', 'START DIALOG', 'WORD TEMPLATES', 'RUN REPORT', and a search icon. The main content area is titled 'SYSTEM MESSAGE TRANSLATION : INFORMATION' and displays the record name 'msg\_DocumentTax\_DocumentTaxR...'. A 'General' tab is selected, showing the following fields:

System Message Translation Name *	msg_DocumentTax_DocumentTaxRecordOnlyHaveOne 1033		
System Message *	msg_DocumentTax_DocumentTaxRecordOnlyHaveOne	Language Code *	English
Message Text *	Document Tax record must have one and only one of the follow fields populated, Invoice, Opportunity, Quote, or Sales Document.		

## View a System Message Translation

1. Open the System Message Translation entity under **Dynamics 365 | Sales | Settings | Solutions**.
2. Open the **Auto Tax Calculator** solution.
3. Click **Configuration** from the list and then click the **Entities** button.
4. Select **System Message Translation**.
5. Open the record you wish to review.

**Note:** You may also access the System Message Translation window using Advanced Find.

## System Message Translations Fields

### Language Code

Language used in the System Message Translation.

### Message Text

Text for the System Message in the language specified in the Language Code field.

### System Message

Identifies the System Message associated with the System Message Translation.

### System Message Translation Name

Descriptive name to define the System Message Translation made up of the System Message and the numeric value of the Language Code.

# Metadata Entity

## Description

The Metadata Entity form stores relevant information for entities within the system and drives what appears on the Configuration page. It is mainly used with the Workflow Launcher entity. The Metadata Entity records are automatically generated during the install. This makes it easier for the user creating the [Workflow Launcher](#) to find the entity the need. This is mainly for advanced users and developers.

The screenshot shows the Dynamics 365 interface for the 'Tax Schedule' Metadata Entity. The top navigation bar includes 'Dynamics 365', 'Settings', and 'Solutions'. Below the navigation bar is a toolbar with actions like '+ NEW', 'DEACTIVATE', 'DELETE', 'PROCESS', 'EMAIL A LINK', 'RUN WORKFLOW', and 'START DIALOG'. The main content area is titled 'METADATA ENTITY : INFORMATION' and 'Tax Schedule'. Under the 'General' tab, the following information is displayed:

Metadata Entity Name *	Tax Schedule	Primary Attribute Logical Name *	rsi_tax_taxscheduleid
Logical Name *	rsi_tax_taxschedule	Primary Attribute Schema Name +	--
Schema Name *	rsi_tax_taxschedule		

Below this information is a table of Metadata Attributes:

Metadata Entity ↑	Metadata Attribute Name ↑	Data Type	Logical Name	Schema Name
Tax Schedule	Tax Schedule owneridname	Short Text	owneridname	OwnerIdName
Tax Schedule	Tax Schedule Owning Team	Lookup	owningteam	OwningTeam
Tax Schedule	Tax Schedule Owning User	Lookup	owninguser	OwningUser
Tax Schedule	Tax Schedule Status	Two Options	statecode	statecode
Tax Schedule	Tax Schedule Traversed Path	Short Text	traversedpath	traversedpath

## View a Metadata Entity

1. Open the Metadata Entity under **Dynamics 365 | Sales | Settings | Solutions**.
2. Open the **Auto Tax Calculator** solution.
3. Click **Configuration** from the list and then click the **Entities** button.
4. Select **Metadata Entity**.
5. Open the record you wish to review.

**Note:** You may also access the Metadata Entity window using Advanced Find.

## Metadata Entity Fields

### Logical Name

Defines the logical or technical name of the entity with the publisher's prefix. Typically, the Logical name is used but there are situations where Schema Name would be used instead, so both names exist.

**Metadata Entity Name**

The display name of the entity.

**Primary Attribute Logical Name**

The logical or technical name of the primary attribute for this entity. This is mainly used by developers.

**Primary Attribute Schema Name**


Displays a user friendly-name for the primary attribute.

**Schema Name**

Generally, it is the same as the Logical Name but uses lower case. Both names are kept as there are some situations where you would use Schema Name instead of Logical Name.

## Metadata Attributes

The Metadata Attributes section displays the attributes/fields associated with the Metadata Entity being viewed. For more information see the [Metadata Attribute](#) section.

Metadata Attributes <span>+</span> 				
Metadata Entity ↑	Metadata Attribute Name ↑	Data Type	Logical Name	Schema Name
<a href="#">Tax Schedule</a>	<a href="#">Tax Schedule owneridname</a>	Short Text	owneridname	OwnerIdName
<a href="#">Tax Schedule</a>	<a href="#">Tax Schedule Owning Team</a>	Lookup	owningteam	OwningTeam
<a href="#">Tax Schedule</a>	<a href="#">Tax Schedule Owning User</a>	Lookup	owninguser	OwningUser
<a href="#">Tax Schedule</a>	<a href="#">Tax Schedule Status</a>	Two Options	statecode	statecode
<a href="#">Tax Schedule</a>	<a href="#">Tax Schedule Traversed Path</a>	Short Text	traversedpath	traversedpath

# Metadata Attribute

## Description

The Metadata Attribute entity stores the technical information for the attributes (fields) associated with an entity, including the type of field.

The screenshot shows the Dynamics 365 interface for the 'Tax Schedule Status' Metadata Attribute. The top navigation bar includes 'Dynamics 365', 'Settings', and 'Solutions'. Below the navigation bar is a toolbar with buttons for '+ NEW', 'DEACTIVATE', 'DELETE', 'PROCESS', 'EMAIL A LINK', 'RUN WORKFLOW', 'START DIALOG', and a menu icon. The main header area displays 'METADATA ATTRIBUTE : INFORMATION' and 'Tax Schedule Status'. The 'General' tab is selected, showing a table of fields:

Metadata Attribute Name *	Tax Schedule Status
Metadata Entity *	Tax Schedule
Logical Name *	statecode
Schema Name *	statecode
Data Type *	Two Options

## View a Metadata Attribute

1. Open the Metadata Attribute under **Dynamics 365 | Sales Settings | Solutions**.
2. Open the **Auto Tax Calculator** solution.
3. Click **Configuration** from the list and then click the **Entities** button.
4. Select **Metadata Attribute**.
5. Open the record you wish to view.

**Note:** You may also access the Metadata Attribute window using Advanced Find.

## Metadata Attribute Fields

### Data Type

Defines the type of field for the attribute, such as Lookup, Date Time, etc.

### Logical Name

Identifies the technical name of the attribute.

### Metadata Attribute Name

User friendly name to describe the attribute.

### Metadata Entity

The Metadata Entity associated with the Metadata Attribute being displayed.

### Schema Name

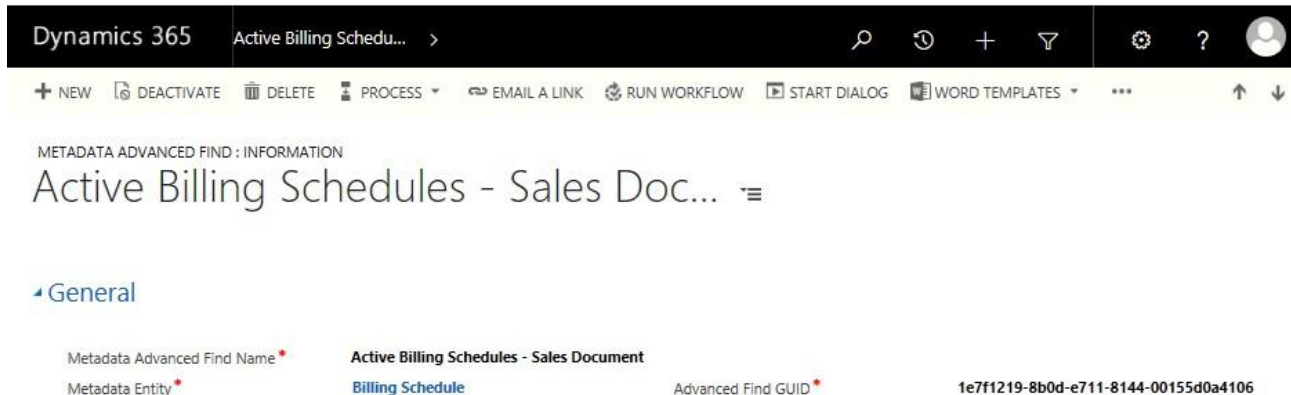
The Schema Name for the Metadata Attribute. This is often the same as the Logical Name.



# Metadata Advanced Find

## Description

The Metadata Advanced Find entity stores the various Advanced Finds within the system and is used with the [Workflow Launcher](#) to make it easier to find the Advanced Find a user wants to use rather than manually typing it in.



## View a Metadata Advanced Find

1. Open the Metadata Advanced Find under **Dynamics 365 | Sales | Settings | Solutions**.
2. Open the **Auto Tax Calculator** solution.
3. Click **Configuration** from the list and then click the **Entities** button.
4. Select **Metadata Advanced Find**.
5. Open the record you wish to review.

## Metadata Advanced Find Fields

### Advanced Find GUID

An alphanumeric string representing the GUID of the Advanced Find record. This is generated upon creation of the Advanced Find record.

### Metadata Advanced Find Name

Name of the Metadata Advanced Find. This will come from the Advanced Find Name.

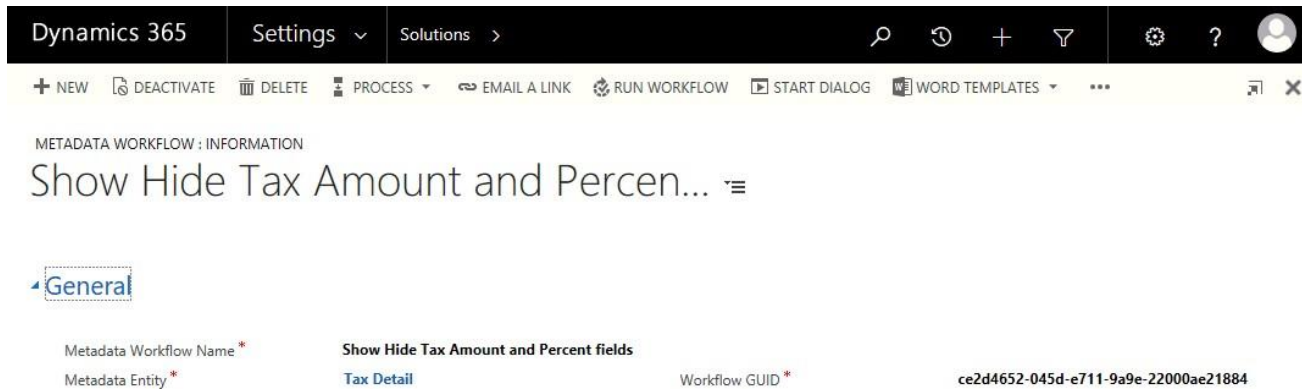
### Metadata Entity

The primary entity on which the Advanced Find is based.

# Metadata Workflow

## Description

The Metadata Workflow entity stores the CRM Processes within the system and is used with the [Workflow Launcher](#). This makes it easier to find the workflow you wish to launch.



The screenshot shows the Dynamics 365 interface for the Metadata Workflow entity. The top navigation bar includes 'Dynamics 365', 'Settings', and 'Solutions'. Below this is a toolbar with various actions like 'NEW', 'DEACTIVATE', 'DELETE', 'PROCESS', 'EMAIL A LINK', 'RUN WORKFLOW', 'START DIALOG', and 'WORD TEMPLATES'. The main content area is titled 'METADATA WORKFLOW : INFORMATION' and displays the name 'Show Hide Tax Amount and Percen...'. A 'General' tab is selected, showing fields for 'Metadata Workflow Name' (with a red asterisk), 'Metadata Entity' (with a red asterisk), 'Show Hide Tax Amount and Percent fields' (with a blue link 'Tax Detail'), 'Workflow GUID' (with a red asterisk), and a GUID value 'ce2d4652-045d-e711-9a9e-22000ae21884'.

## View a Metadata Workflow

1. Open the Metadata Workflow under **Dynamics 365 | Sales | Settings | Solutions**.
2. Open the **Auto Tax Calculator** solution.
3. Click **Configuration** from the list and then click the **Entities** button.
4. Select **Metadata Workflow**.
5. Open the record you wish to view.

**Note:** You may also access the Metadata Workflow window using Advanced Find.

## Metadata Workflow Fields

### Metadata Entity

Identifies the Metadata Entity associated with the Metadata Workflow.

### Metadata Workflow Name

Descriptive name of the Metadata Workflow.

### Workflow GUID

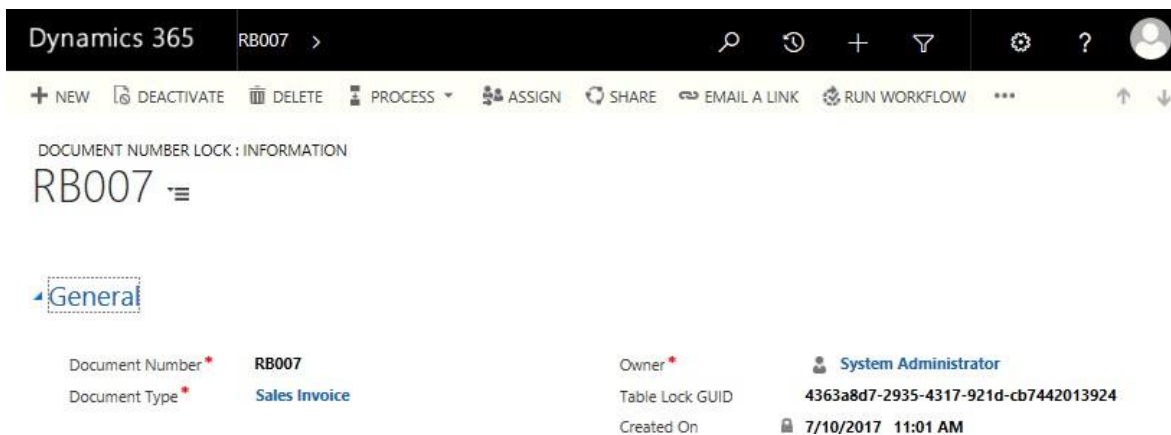
An alphanumeric string representing the GUID of the Workflow record. This is generated upon creation of the Workflow record.

# Document Number Lock

## Description

The Document Number Lock entity is used to increment the Last Document Number field on the Document Type and prevent duplicates. It stores a lock record when a Document Number is being created. Each time a Sales Document is created and a document number is generated, the Document Number Lock is created to hold the unique number assigned to the Sales Document and prevent duplicate Document Numbers from being created.

Typically, you would not need to access this window. If there is an issue with Document Numbers, you would check the [DocumentType](#).



## View a Document Number Lock

1. Open the Document Number Lock under **Dynamics 365 | Sales | Settings | Solutions**.
2. Open the **Auto Tax Calculator** solution.
3. Click **Configuration** from the list and then click the **Entities** button.
4. Select **Document Number Lock**.

## Document Number Lock Fields

### Created On

Displays the date and time the record was created.

### Document Number

Displays the unique Document Number being created.

### Document Type

Displays the type of document being created.

### Table Lock GUID

Temporary placeholder for table locking used when generating a unique Document Number.

# Setup

- CRM Settings
- Account
- Contact
- Customer Address
- Document Type
- Product
- Tax Detail
- Tax Schedule

# CRM Settings

## Auditing

Dynamics 365 has an auditing feature that allows you to view changes on a specific record and see who made the change. Auditing is optional but is recommended for those records you may want to track when changes are made.

Here are the steps to enable auditing:

1. Go to **Dynamics 365 | Sales | Settings | Auditing** and click **Global Audit Settings**.
2. Click the **Auditing** Tab.
3. Under Auditor Settings, mark '**Start Auditing**' and '**Audit user access**' check boxes.
4. Click **OK**.

### System Settings

Set system-level settings for Microsoft Dynamics 365.

General	Calendar	Formats	Auditing	Email	Marketing	Customization	Outlook	Reporting	Goals	Sales
---------	----------	---------	----------	-------	-----------	---------------	---------	-----------	-------	-------

#### Audit Settings

- ☒ Start Auditing
- ☒ Audit user access

By default, auditing is automatically marked on many entity and fields in Auto Tax Calculator but you will need to determine what specifically you would like to audit and verify it is marked appropriately. To verify whether an entity or field is marked to audit, you can review the entity.

1. Go to **Dynamics 365 | Sales | Settings | Auditing** and click **Entity** and **Field Audit Settings**.
2. Click the entity you wish to review.
3. Verify **Auditing** is marked in the 'Data Services' section. This means the entity is set to Audit.

#### Data Services

- ☐ Allow quick create
- ☒ Duplicate detection
- ☒ Auditing

Note: By default, all fields for this entity are enabled for auditing. Click the Fields tab to enable or disable specific fields for auditing.

- ☐ Change Tracking

4. Click **Fields** under the entity list.
5. Find the field you wish to audit and open it.
6. Verify Auditing is set to **Enable**.

Field

### Tax Percent of Tax Detail

Common

- Information
- Business Rules

General

**Schema**

Display Name \*  Field ID

Name \*  Search

Field Security ☐ Enable ☒ Disable

⚠ Enabling field security? [What you need to know](#)

Auditing \* ☒ Enable ☐ Disable

⚠ This field will not be audited until you enable auditing on the entity.

Description

**Note:** There is a tool available in the Xrm Toolbox called Audit Center. This tool allows you to configure audit information within one screen.

## Auto Save

By default, the Auto Save feature in Dynamics 365 is turned on. When it is turned on, it will trigger a save every 30 seconds. When you turn it off, a Save and Save & Close buttons will be added to forms and it will not save until you click one of those options. We recommend you turn the Auto Save off. This prevents records from being saved before they are complete. To change the setting, follow these steps:

1. Go to **Dynamics 365 | Sales | Settings | Administration** and click **System Settings**.
2. Under the 'Select the default save option for forms' section mark **No** for 'Enable auto save on all forms'.

System Settings ? ×

Set system-level settings for Microsoft Dynamics 365.

General	Calendar	Formats	Auditing	Email	Marketing	Customization	Outlook	Reporting	Goals	Sales	Service	Synchronization
---------	----------	---------	----------	-------	-----------	---------------	---------	-----------	-------	-------	---------	-----------------

**Select the default save option for forms**

Enable auto save on all forms ☒ Yes ☐ No

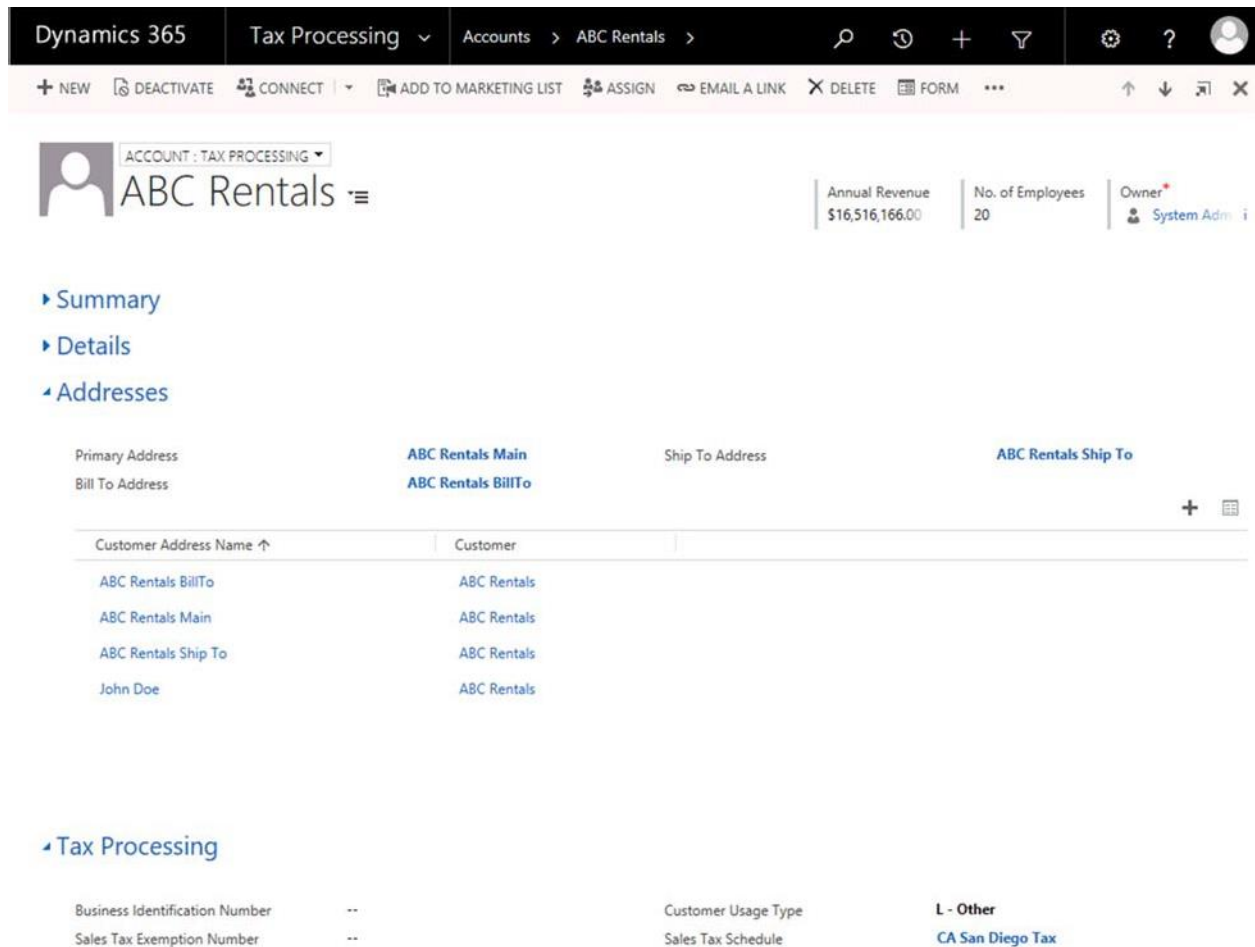
**Set the IM presence option**

Enable presence for the system ☒ Yes ☐ No

# Account

## Description

The Account entity is native to Dynamics 365 but additional sections have been added when using the Auto Tax Calculator app.



**Dynamics 365** Tax Processing > Accounts > ABC Rentals >

+ NEW DEACTIVATE CONNECT ADD TO MARKETING LIST ASSIGN EMAIL A LINK DELETE FORM ...

ACCOUNT: TAX PROCESSING

**ABC Rentals**

Annual Revenue: \$16,516,166.00 No. of Employees: 20 Owner: System Admin

Summary Details Addresses

Primary Address: ABC Rentals Main Bill To Address: ABC Rentals BillTo Ship To Address: ABC Rentals Ship To

Customer Address Name ↑	Customer
ABC Rentals BillTo	ABC Rentals
ABC Rentals Main	ABC Rentals
ABC Rentals Ship To	ABC Rentals
John Doe	ABC Rentals

Tax Processing

Business Identification Number: -- Customer Usage Type: L - Other Sales Tax Exemption Number: -- Sales Tax Schedule: CA San Diego Tax

**Note:** To see this section, use the Account: Auto Tax Calculator form as your default.

## View Account Information

1. Open the Account entity under **Dynamics 365 | Sales | Auto Tax Calculator | Accounts**.
2. Open the Account to review.
3. Click **Auto Tax Calculator** to expand the section.

## Addresses

The Addresses section allows you to create and assign default addresses for the Account. Only one default address may be assigned for the Primary, Bill To, and Ship To addresses but you may create multiple addresses for the Account. The addresses you select here will default on Sales

Documents for the Ship To Address and Bill To Address. If the Ship To Address and/or Bill To Address fields are blank, the Primary Address will be used. When you use the lookup, only those addresses created for the Customer will appear.

When you create a new Account and enter a Street 1 address in Dynamics 365, it will be saved as the Primary Address for the Account if no Primary Address exists in the Addresses section. A Customer may be an Account or a Contact.

If an address has not been completed, you may add a new address on the fly by clicking New. For more information on creating the addresses, see the [Customer Address](#) section.

#### Addresses

Primary Address	ABC Rentals Main	Ship To Address	ABC Rentals Ship To
Bill To Address	ABC Rentals BillTo		
+			
Customer Address Name ↑	Customer		
ABC Rentals BillTo	ABC Rentals		
ABC Rentals Main	ABC Rentals		
ABC Rentals Ship To	ABC Rentals		
John Doe	ABC Rentals		

## Auto Tax Calculator

The Auto Tax Calculator section stores information related to the taxes for this Account.

#### Tax Processing

Business Identification Number	--	Customer Usage Type	L - Other
Sales Tax Exemption Number	--	Sales Tax Schedule	CA San Diego Tax

#### Business Identification Number

The VAT ID for the Account. If this field is populated it will force VAT rules to be considered for the transaction. This field must be a valid number and should not be used for any other purpose.

#### Customer Usage Type

The client customer or usage type (or Entity Use code).

#### Sales Tax Exemption Number

Number assigned to the Account for tax exemption. Any value set in this field will cause the document or line to be exempt from taxes.

#### Sales Tax Schedule

The Tax Schedule assigned to the Account for calculating taxes when a Product is set to calculate taxes Based on Customer.



# Contact

## Description

The Contact entity is native to Dynamics 365 but a additional sections have been added when using the Auto Tax Calculator app.

The screenshot shows the Dynamics 365 interface for a Contact entity named Justin Collins. The top navigation bar includes 'Dynamics 365', 'Tax Processing', and 'Contacts > Justin Collins'. Below the navigation bar is a ribbon with various actions: '+ NEW', 'DEACTIVATE', 'CONNECT', 'ADD TO MARKETING LIST', 'ASSIGN', 'EMAIL A LINK', 'DELETE', 'FORM', 'PROCESS', and a menu icon. The main content area shows the contact's name 'Justin Collins' and a dropdown menu for 'CONTACT : TAX PROCESSING'. Below this, there are three tabs: 'Summary', 'Details', and 'Addresses'. The 'Addresses' tab is selected, showing a table with columns for 'Customer Address Name', 'Customer', and 'Ship To Address'. The table contains one row with the values 'Justin Collins San Diego' and 'Justin Collins'. The 'Ship To Address' column is empty.

**Note:** To see this section, use the Contact: Auto Tax Calculator form as your default.

## View Account Information

1. Open the Contact entity under **Dynamics 365 | Sales | Auto Tax Calculator | Contacts**.
2. Open the Contact to review.
3. Click **Auto Tax Calculator** to expand the section.


## Addresses

The Addresses section allows you to create and assign default addresses for the Contact. Only one default address may be assigned for the Primary, Bill To, and Ship To addresses but you may create multiple addresses for the Contact. The addresses you select here will default on Sales Documents for the Ship To Address and Bill To Address. If the Ship To Address and/or Bill To Address fields are blank, the Primary Address will be used. When you use the lookup, only those addresses created for the Customer will appear.

When you create a new Contact and enter a Street 1 address in Dynamics 365, it will be saved as the Primary Address for the Account if no Primary Address exists in the Addresses section. A Customer may be an Account or a Contact.

If an address has not been completed, you may add a new address on the fly by clicking New. For more information on creating the addresses, see the [Customer Address](#) section.

## Addresses

Primary Address	Justin Collins San Diego	Ship To Address	--
Bill To Address	--		
+ 			
Customer Address Name ↑	Customer		
Justin Collins San Diego	Justin Collins		

## Auto Tax Calculator

The Auto Tax Calculator section stores information related to the taxes for this Account.

## Tax Processing

Business Identification Number	--	Customer Usage Type	L - Other
Sales Tax Exemption Number	--	Sales Tax Schedule	CA San Diego Tax

### Business Identification Number

The VAT ID for the Contact. If this field is populated it will force VAT rules to be considered for the transaction. This field must be a valid number and should not be used for any other purpose.

### Customer Usage Type

The client customer or usage type (or Entity Use code).

### Sales Tax Exemption Number

Number assigned to the Contact for tax exemption. Any value set in this field will cause the document or line to be exempt from taxes.

### Sales Tax Schedule

The Tax Schedule assigned to the Contact for calculating taxes.

# Customer Address

## Description

The Customer Addresses entity is used to track multiple addresses that are tied to a Customer. The Customer Addresses are used with the Avalara Default Ship From Address which is assigned in Inogic Settings.

When you create a new Account or Contact and enter a Street 1 address in Dynamics 365, it will be saved as the Primary Address if no Primary Address exists in the Addresses section.

The Customer may be an Account or a Contact. To see the Contacts, use the Look up more records and change the Look for Criteria.

The screenshot shows the Dynamics 365 interface for the 'Customer Addresses' entity. The breadcrumb trail is 'Dynamics 365 > Tax Processing > Customer Addresses > ABC Rentals Ship To'. The form title is 'CUSTOMER ADDRESS : INFORMATION' followed by 'ABC Rentals Ship To'. The 'General' tab is selected. The form contains the following fields:

Field	Value	Field	Value
Customer Address Name *	ABC Rentals Ship To	Owner *	System Administrator
Customer *	ABC Rentals	Attention	--
Street 1	PO Box 1849	City	San Diego
Street 2	--	State/Province	CA
Street 3	--	ZIP/Postal Code	--
Phone	3214758964	Country/Region	--
Fax	--		

## Create a Customer Address

1. Open the Customer Addresses entity under **Dynamics 365 | Sales | Auto Tax Calculator | Customer Address**.
2. Click **+New**.
3. Enter the needed information.
4. Click **Save**.

## Edit a Customer Address

1. Open the Customer Addresses entity under **Dynamics 365 | Sales | Auto Tax Calculator | Customer Address**.
2. Open the Customer Address you wish to edit.
3. Make the necessary changes.
4. Click **Save**.

## Delete a Customer Address

1. Open the Customer Addresses entity under **Dynamics 365 | Sales | Auto Tax Calculator | Customer Address**.
2. Select the Customer Address you wish to delete.
3. Click **Delete**.

**Note:** You may add, edit, or delete a Customer Address from the Account or Contact entities. In the Account or Contact list, select the Account or Contact and then use the + to add a new address or drill-back on an existing address.

## Account Customer Fields

### **Attention**

Person or group to address attention to in the address.

### **City**

City associated with the address.

### **Customer**

Account or Contact assigned to the Customer Address. The Customer may be an Account or a Contact.

### **Customer Address Name**

Descriptive name for this address. If left blank, it will concatenate the City and the Customer Name.

### **Country/Region**

Country or Region associated with the address.

### **Fax**

Fax number associated with the address.

### **Phone**

Main phone number associated with the address.

### **State/Province**

State or Province associates with the address.

### **Street 1-3**

Street address associated with the address.

### **Zip/Postal Code**

Zip code associated with the address.

# Document Type

## Description

The Document Type entity is used to create and track the document types used within your organization when using Sales Documents in Recurring Billing or Software Management. For instance, you might have Document Types of Invoice and Renewal. Default Document Types are provided for you but you may create additional Document Types based on your business needs.

A Auto Tax Calculator section has been added to be used with the Avalara integration.

The screenshot shows the Dynamics 365 interface for the 'Sales Invoice' entity. The top navigation bar includes 'Dynamics 365' and 'Sales Invoice'. Below the navigation bar is a toolbar with various actions: '+ NEW', 'DEACTIVATE', 'DELETE', 'PROCESS', 'ASSIGN', 'SHARE', 'EMAIL A LINK', and 'RUN WORKFLOW'. A dropdown menu shows 'DOCUMENT TYPE : TAX PROCESSING'. The main title is 'Sales Invoice'. The 'General' tab is selected, showing fields for 'Document Type Name' (Sales Invoice), 'Description' (Sales Invoice), 'Owner' (System Administrator), and 'Is Entity Default' (Yes). The 'Numbering' section shows 'Allow Document Number Entry' (No), 'Table Lock GUID' (--), 'Table Lock Date Time' (--), 'Last Document Number' (INV1048), and 'Table Lock Verification' (--). The 'Tax Processing' tab is also visible, showing 'Avalara Document Type' (--).

Field	Value
Document Type Name *	Sales Invoice
Description *	Sales Invoice
Owner *	System Administrator
Is Entity Default *	Yes

Numbering	
Allow Document Number Entry *	No
Table Lock GUID	--
Table Lock Date Time	--
Last Document Number *	INV1048
Table Lock Verification	--

Tax Processing	
Avalara Document Type	--

## Create a Document Type

1. Open the Document Type entity under **Microsoft Dynamics 365 | Sales | Settings | Solutions**.
2. Open the **Recurring Billing** solution.
3. Click **Configuration** from the list and then click **Entities**.
4. Click **Document Type**.
5. Click **+New**.
6. Enter a name for the Document Type Name.
7. Enter the remaining required fields and any optional fields you wish to include.
8. Click **Save**.

## Edit a Document Type

1. Open the Document Type entity under **Microsoft Dynamics 365 | Sales | Settings | Solutions**.
2. Open the **Recurring Billing** solution.
3. Click **Configuration** from the list and then click **Entities**.
4. Click **Document Type**.
5. Select the Document Type to edit.
6. Make the necessary changes.
7. Click **Save**.

## Delete a Document Type

1. Open the Document Type entity under **Microsoft Dynamics 365 | Sales | Settings | Solutions**.
2. Open the **Recurring Billing** solution.
3. Click **Configuration** from the list and then click **Entities**.
4. Click **Document Type**.
5. Mark the Document Type to remove.
6. Click **Delete**.

**Note:** A Document Type may not be deleted if it has been used on a Sales Document.

## Document Type Auto Tax Calculator Fields

### **Avalara Document Type**

The corresponding Avalara Document Type that will be sent to Avalara for calculating taxes.

# Product

## Description

The Products entity is native to Dynamics 365 but is used within Auto Tax Calculator. Tax information has been added to the Product form in order to determine whether a Product is taxable and whether it is based on the Product or the Customer.

For more information on Products, view the Dynamics 365 help.

The screenshot shows the Dynamics 365 interface for a product. The top navigation bar includes 'Dynamics 365', 'Sales', 'Products', and 'Product: Dynamics 365 Plan 1 Monthly'. Below the navigation bar is a ribbon with tabs: PREVIEW, CLONE, REVISE, RETIRE, DELETE, CONVERT TO KIT, PROCESS, EMAIL A LINK, and a status dropdown. The main content area displays the product name 'Product: Dynamics 365 Plan 1 Monthly' and its status 'Active'. Below this is a 'SUMMARY' section with a table of product details. Further down are sections for 'PRODUCT PROPERTIES', 'ADDITIONAL DETAILS', and 'TAX PROCESSING'. The 'TAX PROCESSING' section shows 'Sales Tax Option' as 'Base on Customer' and 'Sales Tax Schedule' as '--'.

SUMMARY	
Name *	Dynamics 365 Plan 1 Monthly
Product ID *	D3650001
Family Hierarchy	--
Valid From	--
Valid To	--
Description	--
Unit Group *	Default Unit
Default Unit *	Primary Unit
Default Price List *	Default
Decimals Supported *	2
Subject	--

TAX PROCESSING	
Sales Tax Option	Base on Customer
Tax Code	--
Sales Tax Schedule	--

**Note:** To see this section, use the Product: Auto Tax Calculator form as your default.

## Add Product Tax Information

1. Open the Products entity under **Dynamics 365 | Sales | Auto Tax Calculator | Products**.
2. Open the Product you wish to review.
3. Expand Auto Tax Calculator section.
4. Add the necessary tax information.
5. Click **Save**.

## View or Edit a Product Tax Information

1. Open the Products entity under **Dynamics 365 | Sales | Auto Tax Calculator | Products**.
2. Open the Product you wish to review.
3. Expand **Auto Tax Calculator** section.

## Product Auto Tax Calculator Fields

### Sales Tax Option

Defines whether the Product is to be taxed. The options are as follows:

- Taxable
- Non-taxable
- Based on the Customer

### Sales Tax Schedule

The Sales Tax Schedule assigned to the Product. This Tax Schedule will be used when the Product is used on transactions and the Products Sales Tax Option is set to Taxable.

### Tax Code

Avatax system tax code or custom tax code assigned to the Product.



# Tax Detail

## Description

The Tax Detail entity is used to create details around your taxes such as percentage or amount to calculate. The Tax Details are then assigned to [Tax Schedules](#). You may have one Tax Detail assigned to multiple Tax Schedules and a Tax Schedule may contain multiple Tax Details.

The screenshot shows the Dynamics 365 interface for a Tax Detail entity. The top navigation bar includes 'Dynamics 365', 'Tax Processing', and 'Tax Schedules > CA 6% State'. Below the navigation bar is a toolbar with actions: '+ NEW', 'DEACTIVATE', 'DELETE', 'PROCESS', 'ASSIGN', 'SHARE', 'EMAIL A LINK', 'RUN WORKFLOW', and a menu icon. The main section is titled 'TAX DETAIL : INFORMATION' and displays 'CA 6% State'. A 'General' tab is selected. The form fields are as follows:

Field	Value	Field	Value
Tax Detail Name*	CA 6% State	Owner*	System Administrator
Tax Number	--	Tax Based On Option	Percent
Tax Percent*	6.00000		

## Create a Tax Detail

1. Open the Tax Schedule entity under **Dynamics 365 | Sales | Auto Tax Calculator | Tax Schedule**.
2. Create a new Tax Schedule or open an existing Tax Schedule.
3. Click **+** and then click **New** in the Tax Detail section.
4. Enter the required fields and any other necessary fields.
5. Click **Save**.

## Edit a Tax Detail

1. Open the Tax Schedule entity under **Dynamics 365 | Sales | Auto Tax Calculator | Tax Schedule**.
2. Open the Tax Schedule you wish to edit.
3. In the Tax Detail section, open the Tax Detail to edit.
4. Make the necessary changes.
5. Click **Save**.

## Delete a Tax Detail from a Tax Schedule

1. Open the Tax Schedule entity under **Dynamics 365 | Sales | Auto Tax Calculator | Tax Schedule**.
2. Open the Tax Schedule that contains the Tax Detail to delete.
3. In the Tax Detail section, click **Delete** (garbage icon) for the detail you wish to remove.

**Note:** This will delete the Tax Detail from the Tax Schedule only. The Tax Detail will still exist in the system. Follow the steps below to delete the Tax Detail.

## Delete a Tax Detail

1. Open the Tax Schedule entity under Dynamics 365 | Sales | Auto Tax Calculator | Tax Schedule.
2. Open the Tax Schedule that contains the Tax Detail to delete.
3. In the Tax Detail section, open the Tax Delete you wish to delete.
4. Click Delete.

## Tax Detail Fields

### **Tax Based On Option**

Defines whether the tax will be based on Amount or Percent.

### **Tax Detail Name**

Descriptive name of the Tax Detail. This field is required.

### **Tax Number**

A number or description to describe the Tax Detail.

### **Tax Amount/Tax Percent**

Defines the amount or percent of tax to be calculated when this Tax Detail is used. The field displays based on the Tax Based On Option selected.

# Tax Schedule

## Description

The Tax Schedule entity is used to create your Tax Schedules and assign the Tax Details to the schedule. A Tax Schedule is a group of [Tax Details](#) that can be applied to a Product or Customer.

There are two types of calculations; the In-Line Tax Calculation used by Auto Tax Calculator and Avalara. For each line on a document where a Tax Schedule exists, the system calculates the taxes based on the Tax Details assigned to the Tax Schedule. The Total Tax on the header is populated using a sum of Tax from all document lines.

For information on Avalara see the [Avalara AvaTax](#) section.

The screenshot shows the Dynamics 365 interface for the 'Tax Schedules' entity. The breadcrumb trail is 'Dynamics 365 > Tax Processing > Tax Schedules > CA Tax'. The top navigation bar includes buttons for '+ NEW', 'DEACTIVATE', 'DELETE', 'PROCESS', 'ASSIGN', 'SHARE', 'EMAIL A LINK', and 'RUN WORKFLOW'. Below the navigation bar, the page title is 'TAX SCHEDULE : INFORMATION' followed by 'CA Tax'. The 'General' tab is selected, showing the 'Tax Schedule Name' as 'CA Tax' and the 'Owner' as 'System Administrator'. A table lists the associated tax details:

Tax Detail Name ↑	Created On
CA 2% City	8/25/2017 11:36 AM
CA 3% County	8/25/2017 11:37 AM
CA 6% State	8/25/2017 11:36 AM

## Create a Tax Schedule

1. Open the Tax Schedule entity under **Dynamics 365 | Sales | Auto Tax Calculator | Tax Schedules**.
2. Click **+New**.
3. Enter the required fields and any other necessary fields.
4. Click **Save**.

## Edit a Tax Schedule

1. Open the Tax Schedule entity under **Dynamics 365 | Sales | Auto Tax Calculator | Tax Schedule**.
2. Open the Tax Schedule you wish to edit.
3. Make the necessary changes.
4. Click **Save**.

## Delete a Tax Schedule

1. Open the Tax Schedule entity under **Dynamics 365 | Sales | Auto Tax Calculator | Tax Schedule**.
2. Mark the Tax Schedule to remove.
3. Click **Delete**.

## Tax Schedule Fields

### **Tax Details**

Assign the Tax Details to make up the Tax Schedule

### **Tax Schedule Name**

Descriptive name of the Tax Schedule

# Transactions

- Opportunity
- Opportunity Products
- Quote
- Quote Products
- Order
- Order Products
- Invoice
- Invoice Products
- Sales Document
- Sales Document Lines
- Document Tax
- AvaTax

# Opportunity

## Description

The Opportunity entity is native to Dynamics 365. Auto Tax Calculator will work with the Opportunity entity. When a Product is used on the Opportunity and the Product is set to use taxes, the taxes will automatically calculate. The Total Tax field on the form will be the total of all taxes calculated from the Opportunity Productlines.

**Dynamics 365** | Tax Processing | Opportunities > ABCRental Opp001 > [Icons]

NEW | CLOSE AS WON | CLOSE AS LOST | RECALCULATE OPPORTUN... | FORM | PROCESS | ASSIGN | ...

OPPORTUNITY: ROCKTON ESSENTIALS

### ABCRental Opp001

Est. Close Date: -- | Est. Revenue: -- | Status: In Progress | Owner: System Admin

Qualify (Active for 6 hours) > Develop > Propose > Close

#### Product Line Items

Price List: Default | Revenue: User Provided

Product Name	Properties	Unit	Price Per Unit	Quantity
CRM - Maintenance		Primary Unit	\$150.00	1.0000
Monthly Dues		Primary Unit	\$10.00	1.0000
Ad Space (Weekly)		Primary Unit	\$10.00	1.0000
Advertising Services		Primary Unit	\$40.00	1.0000

Detail Amount	\$210.00
(-) Discount (%)	--
(-) Discount	--
Pre-Freight Amount	\$210.00
(+) Freight Amount	--
(+) Total Tax	\$6.60
Total Amount	\$216.60

**Note:** To see this section, use the Opportunity: Inogic Essentials form as your default.

For more information on the Opportunity see the Dynamics 365 help.

# Addresses

The Addresses section displays the Bill To and Ship To for the Opportunity. These fields will default based on the Addresses you have assigned to the Customer (Account or Contact). If a Bill To or Ship To address is not set on the Customer, then the Primary Address will be used. If no Primary Address exists, the address on the Opportunity will remain blank. For more information on setting up addresses see [Customer Addresses](#).

## Addresses

### Bill To Address

Bill To Customer Address	ABC Rentals Sandpoint	
Bill To Attention	--	Bill To Contact --

### Ship To Address

Ship To Customer Address	ABC Rentals Sandpoint	
Ship To Name	--	Ship To City Sandpoint
Ship To Attention	--	Ship To State/Province ID
Ship To Contact	--	Ship To ZIP/Postal Code 83864
Ship To Street 1	PO Box 1849	Ship To Country/Region USA
Ship To Street 2	--	Ship To Phone 3214758964
Ship To Street 3	--	Ship To Fax --

# Opportunity Product

## Description

The Opportunity Product entity is native to Dynamics 365. It is used to add the Product information for the Opportunity. Auto Tax Calculator will calculate the taxes based on the Tax Schedule assigned to the Product or Customer, depending on the option you have assigned to the Product. Each line is calculated individually and the total of all taxes are summed on the header. If the tax amount on the line is incorrect, the taxes can be edited by changing the associated Tax Detail and Tax Schedule. You may also add tax to an Opportunity Product simply by selecting the Tax Schedule in the Auto Tax Calculator section.

For each Opportunity Product line on an Opportunity where a Tax Schedule exists, the system will calculate the Tax amount based on the Tax Details assigned to the Tax Schedule. The Tax Amount on the Opportunity header is populated using a sum of all Opportunity Product lines based on each Tax amount.

**Note:** If you use the Avalara AvaTax integration, see the [Avalara AvaTax](#) section for more information.

The screenshot shows the Dynamics 365 interface for the 'Advertising Services' form. The top navigation bar includes 'Dynamics 365', 'Tax Processing', 'Opportunities', and 'Advertising Services'. Below the navigation bar, there are tabs for 'General' and 'Tax Processing'. The 'General' tab is active, showing fields for 'Select Product' (Existing Product), 'Write-In Product' (Unit), and 'Primary Unit'. The 'Pricing' section shows a table with columns for 'Pricing' and 'Use Default'. The 'Tax Processing' section shows a table for 'Document Taxes' with columns for 'Document Tax Name', 'Tax Amount', and 'Tax Detail'.

Document Tax Name	Tax Amount	Tax Detail
2% City Tax	\$0.80	2% City Tax
3% County Tax	\$1.20	3% County Tax
6% State Tax	\$2.40	6% State Tax

**Note:** To see this section, use the Opportunity Product: Auto Tax Calculator form as your default.



## Create Tax for an Opportunity Product

If taxes were not calculated on the Opportunity and it should have been, you can manually add the taxes one of two ways.

### Using a Tax Schedule

1. Open the Opportunity entity under **Dynamics 365 | Sales | Auto Tax Calculator | Opportunities**.
2. Open the Opportunity to which you wish to add taxes.
3. Open the Opportunity Product line that should be taxed.
4. Expand the **Auto Tax Calculator** section.
5. Enter or select the Tax Schedule you wish to assign.
6. Click **Save** to calculate the tax.

### Manual Calculation

1. Open the Opportunity entity under **Dynamics 365 | Sales | Auto Tax Calculator | Opportunities**.
2. Open the Opportunity to which you wish to add taxes.
3. Open the Opportunity Product line that should be taxed.
4. Enter the tax amount in the Tax field.
5. Click **Save**.

## Edit Tax for an Opportunity Product

1. Open the Opportunity entity under **Dynamics 365 | Sales | Auto Tax Calculator | Opportunities**.
2. Open the Opportunity to which you wish to edit taxes.
3. Open the Opportunity Product line to be edited.
4. Expand the **Auto Tax Calculator** section.
5. Enter or select the new **Tax Schedule** you wish to assign.

**Note:** If the Tax Schedule is correct but calculating incorrectly, you will need to review the [Tax Details](#) and modify them appropriately.

## Delete Tax for an Opportunity Product

1. Open the Opportunity entity under **Dynamics 365 | Sales | Auto Tax Calculator | Opportunities**.
2. Open the Opportunity from where you wish to remove taxes.
3. Open the Opportunity Product line that contains the taxes to be deleted.
4. Expand the **Auto Tax Calculator** section.
5. Remove the Tax Schedule from the Tax Schedule field.
6. Delete the Document Tax records by using the delete icon.
7. Click **Save**.

## Auto Tax Calculator

The Auto Tax Calculator section displays the Tax Schedule currently assigned to the Opportunity Product and the Document Taxes that have been calculated for the line. A different Tax Schedule may be selected here. If the Tax Details need to be changed, those should be changed on the Tax

Schedule.

#### ✦ Tax Processing

Tax Schedule

CA Tax Schedule

##### Document Taxes

+



Document Tax Name ↕	Tax Amount	Tax Detail
2% City Tax	\$0.80	2% City Tax
3% County Tax	\$1.20	3% County Tax
6% State Tax	\$2.40	6% State Tax

# Quote

## Description

The Quote entity is native to Dynamics 365. Auto Tax Calculator will work with the Quote entity. When a Product is used on the Quote and the Product is set to use taxes, the taxes will automatically calculate. The Total Tax field on the form will be the total of all taxes calculated from the Quote Product lines.

Dynamics 365

Tax Processing

Quotes > ABC Rentals QTE2001

NEW

DELETE

LOOK UP ADDRESS

ACTIVATE QUOTE

PRINT QUOTE FOR CUSTOMER

GET PRODUCTS

PROCESS

ASSIGN

SHARE

...

QUOTE: ROCKTON ESSENTIALS

ABC Rentals QTE2001

Total Amount  
\$90.45

Effective From  
--

Effective To  
--

Owner  
System Administrator

Summary

Quote ID  
QTE2001

Revision ID  
0

Name  
ABC Rentals QTE2001

Currency  
US Dollar

Price List  
Default

Document Date  
--

SHIPPING INFORMATION

Ship To  
Address

Shipping Method  
--

Payment Terms  
--

Freight Terms  
--

PRODUCTS

Product Name	Properties	Unit	Price Per Unit	Quantity	Discount	Extended Amount	Suggestion
Ad Space		Primary Unit	\$10.00	1.00000	\$0.00	\$10.00	
Basic Cabl		Primary Unit	\$34.95	1.00000	\$0.00	\$34.95	
Advertisin		Primary Unit	\$40.00	1.00000	\$0.00	\$44.40	

SALES INFORMATION

Opportunity  
--

Potential Customer  
ABC Rentals

DESCRIPTION  
--

Detail Amount	\$84.95
(-) Discount (%)	{ -- }
(-) Discount	--
Pre-Freight Amount	\$84.95
(+) Freight Amount	--
(=) Total Tax	\$5.50
Total Amount	\$90.45

Addresses

Details

**Note:** To see this section, use the Quote: Inogic Essential form as your default.

For more information on the Quote see the Dynamics 365 help.

# Quote Product

## Description

The Quote Product entity is native to Dynamics 365. It is used to add the Product information for the Quote. Auto Tax Calculator will calculate the taxes based on the Tax Schedule assigned to the Product or Customer, depending on the option you have assigned to the Product. Each line is calculated individually and the total of all taxes are summed on the header. If the tax amount on the line is incorrect, the taxes can be edited by changing the associated Tax Detail and Tax Schedule. You may also add tax to a Quote Product simply by selecting the Tax Schedule in the Auto Tax Calculator section.

For each Quote Product line on an Quote where a Tax Schedule exists, the system will calculate the Tax amount based on the Tax Details assigned to the Tax Schedule. The Tax Amount on the Quote header is populated using a sum of all Quote Product lines based on each Tax amount.

**Note:** If you use the Avalara AvaTax integration, see the [Avalara AvaTax](#) section for more information.

The screenshot shows the Dynamics 365 Tax Processing interface for a Quote Product. The top navigation bar includes 'Dynamics 365', 'Tax Processing', and 'Quotes > Advertising Services'. Below the navigation bar, there are tabs for 'QUOTE PRODUCT: TAX PROCESSING' and 'Advertising Services'. The 'General' tab is active, showing fields for 'Select Product' (Existing Product), 'Write-In Product' (Unit), and 'Price Per Unit' (\$40.00). The 'Pricing' section shows a table with columns for 'Pricing' and 'Use Default'. The 'Tax Processing' section shows a table for 'Document Taxes' with columns for 'Document Tax Name', 'Tax Amount', and 'Tax Detail'.

Document Tax Name	Tax Amount	Tax Detail
2% City Tax	\$0.80	2% City Tax
3% County Tax	\$1.20	3% County Tax
6% State Tax	\$2.40	6% State Tax

**Note:** To see this section, use the Opportunity Product: Auto Tax Calculator form as your default.

## Create Tax for a Quote Product

If taxes were not calculated on the Quote and it should have been, you can manually add the taxes one of two ways.

### Using a Tax Schedule

1. Open the Quote entity under **Dynamics 365 | Sales | Auto Tax Calculator | Quotes**.
2. Open the Quote to which you wish to add taxes.
3. Open the Quote Product line that should be taxed.
4. Expand the **Auto Tax Calculator** section.
5. Enter or select the **Tax Schedule** you wish to assign.
6. Click **Save** to calculate the tax.

### Manual Calculation

1. Open the Quote entity under **Dynamics 365 | Sales | Auto Tax Calculator | Quote**.
2. Open the Quote to which you wish to add taxes.
3. Open the Quote Product line that should be taxed.
4. Enter the tax amount in the Tax field.
5. Click **Save**.

## Edit Tax for a Quote Product

1. Open the Quote entity under **Dynamics 365 | Sales | Auto Tax Calculator | Quotes**.
2. Open the Quote to which you wish to edit taxes.
3. Open the Quote Product line to be edited.
4. Expand the **Auto Tax Calculator** section.
5. Enter or select the new **Tax Schedule** you wish to assign.

**Note:** If the Tax Schedule is correct but calculating incorrectly, you will need to review the [Tax Details](#) and modify them appropriately.

## Delete Tax for a Quote Product

1. Open the Quote entity under **Dynamics 365 | Sales | Auto Tax Calculator | Quotes**.
2. Open the Quote from where you wish to remove taxes.
3. Open the Quote Product line that contains the taxes to be deleted.
4. Expand the **Auto Tax Calculator** section.
5. Remove the Tax Schedule from the Tax Schedule field.
6. Delete the Document Tax records by using the delete icon.
7. Click **Save**.

**Note:** Verify the Tax field is \$0.00.

## Auto Tax Calculator

The Auto Tax Calculator section displays the Tax Schedule currently assigned to the Quote Product and the Document Taxes that have been calculated for the line. A different Tax Schedule may be selected here. If the Tax Details need to be changed, those should be changed on the



Schedule.

▸ Tax Processing

Tax Schedule

CA Tax Schedule

Document Taxes

Document Tax Name ↕	Tax Amount	Tax Detail
2% City Tax	\$0.60	2% City Tax
3% County Tax	\$1.20	3% County Tax
6% State Tax	\$2.40	6% State Tax

# Order

## Description

The Order entity is native to Dynamics 365. Auto Tax Calculator will work with the Order entity. When a Product is used on the Order and the Product is set to use taxes, the taxes will automatically calculate. The Total Tax field on the form will be the total of all taxes calculated from the Order Product lines.

Dynamics 365Tax ProcessingOrdersEagle Foods ORD1004

NEWDELETECREATE INVOICEPROCESSFULFILL ORDERCANCEL ORDERRECALCULATEGET PRODUCTSLock Pricing

ORDER: ROCKYTON ESSENTIALSEagle Foods ORD1004

Total Amount\$71.65StatusActiveStatus ReasonNewOwnerSystem Admin

Summary

Order IDORD1004NameEagle Foods ORD1004CurrencyUS DollarPrice ListDefaultPrices LockedNo

DATESDocument DateRequested DeliveryDate Fulfilled

SHIPPING INFORMATIONShip ToShipping MethodPayment TermsFreight Terms

PRODUCTS

Product Name	Properties	Unit	Price Per Unit	Quantity	Discount	Extended Amount
Monthly		Primary Unit	\$25.00	1.00000	\$0.00	\$25.00
Subscription		Primary Unit	\$2.25	1.00000	\$0.00	\$2.25
Advertisement		Primary Unit	\$40.00	1.00000	\$0.00	\$44.40

Detail Amount\$67.25

(-) Discount (%)

(-) Discount

Pre-Freight Amount\$67.25

(+) Freight Amount

(+) Total Tax\$4.40

Total Amount\$71.65

SALES INFORMATION

OpportunityQuotePotential CustomerEagle Food Centers

DESCRIPTION

**Note:** To see this section, use the Order: Inogic Essential form as your default.

For more information on the Order see the Dynamics 365 help.

## Addresses

The Addresses section displays the Bill To and Ship To for the Order. These fields will default based on the Addresses you have assigned to the Customer (Account or Contact). If a Bill To or Ship To address is not set on the Customer, then the Primary Address will be used. If no Primary Address exists, the address on the Order will remain blank. For more information on setting up addresses see Customer Addresses.

### Addresses

Bill To Address

Bill To Address8 Hickorty Ridge DriveLas Vegas, NV 89109USA

Bill To Customer AddressBriazz Candies Las Vegas

Bill To Phone7026758005

Bill To Fax

Ship To Address

Ship To Address4114 Village LaneLas Vegas, NV 89109USA

Ship To Customer AddressBriazz Candies Las Vegas

Ship To Phone7026758005

Ship to Fax

Bill To Name

Bill To Attention

Bill To Contact

Ship To Name

Ship To AttentionSuzanne

Ship To ContactSuzanne Bane



# Order Product

## Description

The Order Product entity is native to Dynamics 365. It is used to add the Product information for the Order. Auto Tax Calculator will calculate the taxes based on the Tax Schedule assigned to the Product or Customer, depending on the option you have assigned to the Product. Each line is calculated individually and the total of all taxes are summed on the header. If the tax amount on the line is incorrect, the taxes can be edited by changing the associated Tax Detail and Tax Schedule. You may also add tax to an Order Product simply by selecting the Tax Schedule in the Auto Tax Calculator section.

For each Order Product line on an Order where a Tax Schedule exists, the system will calculate the Tax amount based on the Tax Details assigned to the Tax Schedule. The Tax Amount on the Order header is populated using a sum of all Order Product lines based on each Tax amount.

**Note:** If you use the Avalara AvaTax integration, see the [Avalara AvaTax](#) section for more information.

The screenshot shows the Dynamics 365 interface for the 'Advertising Services' entity. The top navigation bar includes 'Dynamics 365', 'Tax Processing', and 'Orders > Advertising Services'. Below the navigation bar is a toolbar with actions like 'DELETE', 'LOOK UP ADDRESS', 'EDIT PROPERTIES', 'EMAIL A LINK', 'RUN WORKFLOW', and 'START DIALOG'. The main header area displays 'ORDER PRODUCT : TAX PROCESSING' and 'Advertising Services'. The 'General' tab is active, showing fields for 'Select Product' (Existing), 'Existing Product' (Advertising Services), 'Write-In Product' (--), and 'Unit' (Primary Unit). The 'Pricing' tab is also visible, showing a table of pricing details.

Pricing	
Pricing	Use Default
Price Per Unit	\$40.00
Volume Discount	\$0.00
Quantity	1.00000
Amount	\$40.00
Manual Discount	\$0.00
Tax	\$4.40
Extended Amount	\$44.40

- Delivery
- Address
- ▾ Tax Processing

Tax Schedule		CA Tax Schedule	
Document Taxes		+	
Document Tax Name ↑	Tax Amount	Tax Detail	
2% City Tax	\$0.80	2% City Tax	
3% County Tax	\$1.20	3% County Tax	
6% State Tax	\$2.40	6% State Tax	

**Note:** To see this section, use the Opportunity Product: Auto Tax Calculator form as your default.

## Create Tax for an Order Product

If taxes were not calculated on the Order and it should have been, you can manually add the axes one of two ways.

### Using a Tax Schedule

1. Open the Order entity under **Dynamics 365 | Sales | Auto Tax Calculator | Orders**.
2. Open the Order to which you wish to add taxes.
3. Open the Order Product line that should be taxed.
4. Expand the **Auto Tax Calculator** section.
5. Enter or select the **Tax Schedule** you wish to assign.
6. Click **Save** to calculate the tax.

### Manual Calculation

1. Open the Order entity under **Dynamics 365 | Sales | Auto Tax Calculator | Orders**.
2. Open the Order to which you wish to add taxes.
3. Open the Order Product line that should be taxed.
4. Enter the tax amount in the Tax field.
5. Click **Save**.

## Edit Tax for an Order Product

1. Open the Order entity under **Dynamics 365 | Sales | Auto Tax Calculator | Orders**.
2. Open the Order to which you wish to edit taxes.
3. Open the Order Product line to be edited.
4. Expand the **Auto Tax Calculator** section.
5. Enter or select the new **Tax Schedule** you wish to assign.

**Note:** If the Tax Schedule is correct but calculating incorrectly, you will need to review the [Tax Details](#) and modify them appropriately.

## Delete Tax for an Order Product

1. Open the Order entity under **Dynamics 365 | Sales | Auto Tax Calculator | Orders**.
2. Open the Order from where you wish to remove taxes.

3. Open the Order Product line that contains the taxes to be deleted.
4. Expand the **Auto Tax Calculator** section.
5. Remove the Tax Schedule from the Tax Schedule field.
6. Delete the Document Tax records by using the delete icon.
7. Click **Save**.

**Note:** Verify the Tax field is \$0.00.

## Auto Tax Calculator

The Auto Tax Calculator section displays the Tax Schedule currently assigned to the Quote Product and the Document Taxes that have been calculated for the line. A different Tax Schedule may be selected here. If the Tax Details need to be changed, those should be changed on the Tax Schedule.

### ▸ Tax Processing

Tax Schedule

CA Tax Schedule

#### Document Taxes

Document Tax Name ↑	Tax Amount	Tax Detail
2% City Tax	\$0.60	2% City Tax
3% County Tax	\$1.20	3% County Tax
6% State Tax	\$2.40	6% State Tax

# Invoice

## Description

The Invoice entity is native to Dynamics 365. Auto Tax Calculator will work with the Invoice entity. When a Product is used on the Invoice and the Product is set to use taxes, the taxes will automatically calculate. The Total Tax field on the form will be the total of all taxes calculated from the Invoice Product lines.

Dynamics 365Tax ProcessingInvoices > INV1003 >

NEWDELETELOOK UP ADDRESSINVOICE PAIDCANCEL INVOICERECALCULATEGET PRODUCTSLock PricingPROCESS

INVOICE : ROCKTON ESSENTIALSINV1003

Total Amount\$1,426.95StatusActiveStatus ReasonNewOwnerSystem Admin

Summary

Invoice IDINV-01002-T4MNameINV1003CurrencyUS DollarPrice ListDefaultPrices LockedNo

DATESDocument DateDue DateDate Delivered

SHIPPING INFORMATIONShip ToAddressShipping MethodPayment Terms

PRODUCTS

Product Name	Properties	Unit	Price Per Unit	Quantity	Discount	Extended Amou
Bundle - C I		Primary Unit	\$94.95	1.00000	\$0.00	\$94.95
Auditor		Primary Unit	\$300.00	4.00000	\$0.00	\$1,332.00

SALES INFORMATION

OpportunityOrderCustomerPC ConsultingDescription

Paid AmountRemaining Amount\$1,426.95

Detail Amount	\$1,294.95
(-) Discount (%)	{ -- }
(-) Discount	--
Pre-Freight Amount	\$1,294.95
(+) Freight Amount	--
(+) Total Tax	\$132.00
Total Amount	\$1,426.95

AddressesDetails

**Note:** To see this section, use the Opportunity: Inogic Essential form as your default. For more information on the Invoice see the Dynamics 365 help.

## Addresses

The Addresses section displays the Bill To and Ship To for the Invoice. These fields will default based on the Addresses you have assigned to the Customer (Account or Contact). If a Bill To or Ship To address is not set on the Customer, then the Primary Address will be used. If no Primary Address exists, the address on the Invoice will remain blank. For more information on setting up addresses see Customer Addresses.

## Addresses

### Bill To Address

Bill To Address	<b>8 Hickorty Ridge Drive Las Vegas, NV 89109 USA</b>	Bill To Name	--
Bill To Customer Address	<a href="#">Briazz Candies Las Vegas</a>	Bill To Attention	--
Bill To Phone	<b>7026758005</b>	Bill To Contact	--
Bill To Fax	--		

### Ship To Address

Ship To Address	<b>4114 Village Lane Las Vegas, NV 89109 USA</b>	Ship To Name	<b>Ship</b>
Ship To Customer Address	<a href="#">Briazz Candies Las Vegas</a>	Ship To Attention	<b>Suzanne</b>
Ship To Phone	<b>7026758005</b>	Ship To Contact	<a href="#">Suzanne Bane</a>
Ship to Fax	--		

# Invoice Product

## Description

The Invoice Product entity is native to Dynamics 365. It is used to add the Product information for the Invoice. Auto Tax Calculator will calculate the taxes based on the Tax Schedule assigned to the Product or Customer, depending on the option you have assigned to the Product. Each line is calculated individually and the total of all taxes are summed on the header. If the tax amount on the line is incorrect, the taxes can be edited by changing the associated Tax Detail and Tax Schedule. You may also add tax to a Invoice Product simply by selecting the Tax Schedule in the Auto Tax Calculator section.

For each Invoice Product line on an Invoice where a Tax Schedule exists, the system will calculate the Tax amount based on the Tax Details assigned to the Tax Schedule. The Tax Amount on the Invoice header is populated using a sum of all Invoice Product lines based on each Tax amount.

**Note:** If you use the Avalara AvaTax integration, see the [Avalara AvaTax](#) section for more information.

The screenshot shows the Dynamics 365 interface for the 'Advertising Services' form. The top navigation bar includes 'Dynamics 365', 'Sales', 'Invoices', and 'Advertising Services'. Below the navigation bar is a toolbar with icons for 'DELETE', 'LOOK UP ADDRESS', 'EDIT PROPERTIES', 'EMAIL A LINK', 'RUN WORKFLOW', and 'START DIALOG'. The main header area displays 'INVOICE PRODUCT : TAX PROCESSING' and 'Advertising Services'. The 'General' tab is active, showing fields for 'Select Product' (Existing Product), 'Write-In Product' (Unit), and 'Price List'. The 'Pricing' section includes 'Price Per Unit' (\$40.00), 'Volume Discount' (\$0.00), 'Quantity' (20.00000), 'Amount' (\$800.00), 'Manual Discount' (--), 'Tax' (\$88.00), and 'Extended Amount' (\$888.00). The 'Tax Processing' section shows 'CA Tax Schedule' selected. The 'Document Taxes' table lists three taxes: 2% City Tax (\$16.00), 3% County Tax (\$24.00), and 6% State Tax (\$48.00).

Document Tax Name	Tax Amount	Tax Detail
2% City Tax	\$16.00	2% City Tax
3% County Tax	\$24.00	3% County Tax
6% State Tax	\$48.00	6% State Tax

**Note:** To see this section, use the Opportunity Product: Auto Tax Calculator form as your default.

## Create Tax for an Invoice Product

If taxes were not calculated on the Invoice and it should have been, you can manually add the taxes one of two ways.

### Using a Tax Schedule

1. Open the Invoice entity under **Dynamics 365 | Sales | Auto Tax Calculator | Invoices**.
2. Open the Invoice to which you wish to add taxes.
3. Open the Invoice Product line that should be taxed.
4. Expand the **Auto Tax Calculator** section.
5. Enter or select the **Tax Schedule** you wish to assign.
6. Click **Save** to calculate the tax.

### Manual Calculation

1. Open the Opportunity entity under **Dynamics 365 | Sales | Auto Tax Calculator | Invoices**.
2. Open the Opportunity to which you wish to add taxes.
3. Open the Invoice Product line that should be taxed.
4. Enter the tax amount in the Tax field.
5. Click **Save**.

## Edit Tax for an Invoice Product

1. Open the Invoice entity under **Dynamics 365 | Sales | Auto Tax Calculator | Invoice**.
2. Open the Invoice to which you wish to edit taxes.
3. Open the Invoice Product line to be edited.
4. Expand the **Auto Tax Calculator** section.
5. Enter or select the new **Tax Schedule** you wish to assign.

**Note:** If the Tax Schedule is correct but calculating incorrectly, you will need to review the [Tax Details](#) and modify them appropriately.

## Delete Tax for an Invoice Product

1. Open the Invoice entity under **Dynamics 365 | Sales | Auto Tax Calculator | Invoices**.
2. Open the Invoice from where you wish to remove taxes.
3. Open the Product line that contains the taxes to be deleted.
4. Expand the **Auto Tax Calculator** section.
5. Remove the Tax Schedule from the Tax Schedule field.
6. Delete the Document Tax records by using the delete icon.
7. Click **Save**.

**Note:** Verify the Tax field is \$0.00.

## Auto Tax Calculator

The Auto Tax Calculator section displays the Tax Schedule currently assigned to the Invoice Product and the Document Taxes that have been calculated for the line. A different Tax Schedule may be selected here. If the Tax Details need to be changed, those should be changed on the Tax Schedule.

## • Tax Processing

Tax Schedule :

CA Tax Schedule

### Document Taxes



Document Tax Name *	Tax Amount	Tax Detail
2% City Tax	\$16.00	2% City Tax
3% County Tax	\$24.00	3% County Tax
6% State Tax	\$48.00	6% State Tax



# Sales Document

## Description

The Sales Document entity allows you to use additional Document Types to further define your transactions. It also allows you to have better control over the Document Number as well. This is helpful when you want to integrate with other ERP systems.

Dynamics 365

Tax Processing

Sales Documents > INV1049 >

NEW

DEACTIVATE

DELETE

PROCESS

ASSIGN

SHARE

EMAIL A LINK

RUN WORKFLOW

START DIALOG

\*\*\*

SALES DOCUMENT : INFORMATION

INV1049

General

Document Number

INV1049

Document Type

Sales Invoice

Customer

Cala Foods Shop

Price List

Default

Is Paid

No

Owner

System Administrator

Currency

US Dollar

Document Date

9/27/2017

Due Date

9/27/2017

Document Description

--

Remaining Amount

\$0.00

Tax Amount

\$0.00

Discount Amount

\$0.00

Discount Percent

0.00

Discount Percent Amount

\$0.00

Paid Amount

--

Subtotal Amount

\$0.00

Freight Amount

\$0.00

Freight Percent

0.00

Freight Percent Amount

\$0.00

Document Amount

\$0.00

Sales Document Lines

Line Number

Sequence NU...

Product

Unit

Quantity Count

Unit Price Am...

Markdown Pe...

Markdown Pe...

Markdown A...

Extended Unit...

Tax Amount

Subtotal Amo...

INV1049 1

1 Advertising Serv...

Primary U...

5.00

\$40.00

\$0.00

\$200.00

\$22.00

\$222.00

Addresses

Bill To Address

Bill To Address

Cala Foods Shop Chicago

Bill To City

Fresno

Bill To Name

--

Bill To State/Province

CA

Bill To Attention

--

Bill To ZIP/Postal Code

94311

Bill To Contact

Allen Starbuck

Bill To Country/Region

USA

Bill To Street 1

3654 West Drive

Bill To Phone

3124369652

Bill To Street 2

--

Bill To Fax

--

Bill To Street 3

--

Ship To Address

Ship To Address

Cala Foods Shop Chicago

Ship To City

Fresno

Ship To Name

--

Ship To State/Province

CA

Ship To Attention

--

Ship To ZIP/Postal Code

94311

Ship To Contact

--

Ship To Country/Region

USA

Ship To Street 1

4552

Ship To Phone

3124369652

Ship To Street 2

Main Ave

Ship To Fax

--

Ship To Street 3

--

## Create Tax for a Sales Document Line

If taxes were not calculated on the Invoice and it should have been, you can manually add the taxes one of two ways.

### Using a Tax Schedule

1. Open the Sales Document entity under **Dynamics 365 | Sales | Auto Tax Calculator | Sales Documents**.
2. Open the Sales Document to which you wish to add taxes.
3. Open the Sales Document Line that should be taxed.
4. Expand the **Auto Tax Calculator** section.
5. Enter or select the **Tax Schedule** you wish to assign.
6. Click **Save** to calculate the tax.

### Manual Calculation

1. Open the Sales Document entity under **Dynamics 365 | Sales | Auto Tax Calculator | Sales Documents**.
2. Open the Sales Document to which you wish to add taxes.
3. Open the Sales Document Line that should be taxed.
4. Enter the tax amount in the Tax field.
5. Click **Save**.

## Edit Tax for a Sales Document Line

1. Open the Sales Document entity under **Dynamics 365 | Sales | Auto Tax Calculator | Sales Documents**.
2. Open the Sales Document for which you wish to edit taxes.
3. In the Sales Document Lines section, open the line you wish to modify.
4. Expand the **Auto Tax Calculator** section.
5. Enter or select the new Tax Schedule you wish to assign.

**Note:** If the Tax Schedule is correct but calculating incorrectly, you will need to review the Tax Details and modify them appropriately.

## Delete a Sales Document Line

1. Open the Sales Document entity under **Dynamics 365 | Sales | Auto Tax Calculator | Sales Documents**.
2. Select the Sales Document from which you wish to remove the taxes.
3. Open the Sales Document Line that contains the taxes to be deleted.
4. Expand the **Auto Tax Calculator** section.
5. Remove the Tax Schedule from the Tax Schedule field.
6. Delete the Document Tax records using the delete icon.
7. Click **Save**.

**Note:** Verify the Tax field is \$0.00.

# Sales Document Fields

**Currency**

The Currency assigned to the Sales Document.

**Customer**

Customer assigned to the Sales Document. The Customer may be an Account or a Contact. To see the Contacts, use the Look up More Records and change the Look for criteria to Contact.

**Discount Amount**

The amount to discount from this document. This is typically a discount given to a preferred customer. The amount may be manually entered.

**Discount Percent**

Percent to discount from this document. This is typically given to a preferred customer. A Discount Amount and Discount Percent may both be used.

**Discount Percent Amount**

The amount to be discounted based on the Discount Percent entered.

**Document Amount**

Total amount of the document including the Subtotal, Taxes, Freight, and Markdowns. The Amount is based on this formula:

$$\text{Doc Amount} = \text{Subtotal} - (\text{subtotal} * \text{Markdown percent}/100) + (\text{Subtotal} * \text{Freight Percent}/100) - \text{Markdown Amount} + \text{Freight Amount} + \text{Tax Amount}$$
**Document Date**

The date of the Sales Document. This will default as the current date when the Sales Document is created.

**Document Description**

Additional information or details to further define the transaction.

**Document Number**

Number provided to the document based on the Document Type setup. If the Allow Document Number Entry option is set to No for the Document Type, the Document Number is automatically created based on the Last Document Number field. If the Allow Document Number Entry option is set to Yes, the user manually enters the Document Number.

**Document Type**

Identifies the Document Type assigned to the Sales Document, for example Invoice or Renewal. It will default based on the Document Type you have marked as Default in the Document Type window.

**Due Date**

The date the payment is due for the Sales Document.

**Freight Amount**

Amount of freight for the Sales Document.

**Freight Percent**

Percent of the Sales Document to calculate as a freight charge. You may enter a Freight Amount and a Freight Discount.

**Freight Percent Amount**

The amount of freight calculated based on the Freight Percent.

**Is Paid**

Identifies whether the Sales Document has been Paid In full.

**Paid Amount**

The amount that has been paid on the Sales Document.

**Price List**

Price List used on the Sales Document. It is recommended you have at least one default Price List.

**Remaining Amount**

The amount remaining to be applied to this Sales Document. This amount is set when you use the workflow or dialog to pay a Sales Document. Completely applied documents will have a Remaining Amount of \$0.00.

**Subtotal Amount**

Amount calculated from the Extended Unit Price of each Sales Document Line.

**Tax Amount**

The amount of taxes calculated for this document. This amount will automatically calculate from the sum of the Tax amount s you have entered on the Sales Document Line.

## Sales Document Lines

The Sales Document Lines section displays the Products associated with the Sale Document. For more information, see [Sales DocumentLines](#).

### ▸ Sales Document Lines

										+ 	
Line Number ↑	Sequence Nu...	Product	Unit	Quantity Cou...	Unit Price Am...	Markdown Pe...	Markdown Pe...	Markdown A...	Extended		
INV1049 1	1	Advertising Serv...	Primary Unit	5.00	\$40.00				\$0.00		

## Addresses

The Addresses section displays the Bill To and Ship To for the Sales Document. These fields will default based on the Addresses you have assigned to the Customer (Account or Contact). If a Bill To or Ship To address is not set on the Customer, then the Primary Address will be used. If no Primary Address exists, the address on the Sales Document will remain blank. For more information on setting up addresses see [Customer Address](#).

## Addresses

### Bill To Address

Bill To Address	<b>Cala Foods Shop Chicago</b>	Bill To City	<b>Fresno</b>
Bill To Name	--	Bill To State/Province	<b>CA</b>
Bill To Attention	--	Bill To ZIP/Postal Code	<b>94311</b>
Bill To Contact	<b>Allen Starbuck</b>	Bill To Country/Region	<b>USA</b>
Bill To Street 1	<b>3654 West Drive</b>	Bill To Phone	<b>3124369652</b>
Bill To Street 2	--	Bill To Fax	--
Bill To Street 3	--		

### Ship To Address

Ship To Address	<b>Cala Foods Shop Chicago</b>	Ship To City	<b>Fresno</b>
Ship To Name	--	Ship To State/Province	<b>CA</b>
Ship To Attention	--	Ship To ZIP/Postal Code	<b>94311</b>
Ship To Contact	--	Ship To Country/Region	<b>USA</b>
Ship To Street 1	<b>4552</b>	Ship To Phone	<b>3124369652</b>
Ship To Street 2	<b>Main Ave</b>	Ship To Fax	--
Ship To Street 3	--		

# Sales Document Line

## Description

The Sales Document Lines entity is used to enter the specifics about the product you sold on the Sales Document. The lines will include quantity, pricing, and discounts that may be included. This information will carry over with other Sales Document Lines to the totals on the Sales Document.

A Sales Document Line may be a Product or a Write-in Item. You may have Products and Write-in Items on the same Sales Document but not the same Sales Document Line.

For each Sales Document Line on a Sales Document where a Tax Schedule exists, the system will calculate the Tax amount based on the Tax Details assigned to the Tax Schedule. The Tax Amount on the Sales Document header is populated using a sum of all Sales Document Lines based on each Tax amount.

**Note:** If you use the Avalara AvaTax integration, see the [Avalara AvaTax](#) section for more information.

Dynamics 365Tax ProcessingSales Documents > INV1049 1

NEWDEACTIVATEDELETEPROCESSASSIGNSHAREEMAIL A LINKRUN WORKFLOW

SALES DOCUMENT LINE : TAX PROCESSING

INV1049 1

General

Line NumberINV1049 1

Sales DocumentINV1049

ProductAdvertising Services

Write-in Item--

UnitPrimary Unit

Sales Document Line Note--

OwnerSystem Administrator

Sequence Number1

Price ListDefault

CurrencyUS Dollar

Quantity Count5.00

Unit Price Amount\$40.00

Markdown Percent--

Markdown Percent Amount\$0.00

Markdown Amount--

Extended Unit Price Amount\$200.00

Tax Amount\$22.00

Subtotal Amount\$222.00

Tax Processing

Tax ScheduleCA Tax Schedule

Document Taxes

Document Tax Name	Tax Amount	Tax Detail
2% City Tax	\$4.00	2% City Tax
3% County Tax	\$6.00	3% County Tax
6% State Tax	\$12.00	6% State Tax

## Create a Sales Document Line

1. Open the Sales Document entity under **Dynamics 365 | Sales | Auto Tax Calculator | Sales Documents**.
2. Create a new Sales Document or open an existing Sales Document.
3. Click the **+** in the Sales Document Lines section to add a new line if one is needed.
4. Enter the required information and any optional fields you wish to include.
5. Click **Save**.

## Edit a Sales Document Line

1. Open the Sales Document entity under **Dynamics 365 | Sales | Auto Tax Calculator | Sales Documents**.
2. Open the Sales Document you wish to edit.
3. In the Sales Document Lines section, open the line you wish to modify.
4. Make the necessary changes.
5. Click **Save**.

## Delete a Sales Document Line

1. Open the Sales Document entity under **Dynamics 365 | Sales | Auto Tax Calculator | Sales Documents**.
2. Select the Sales Document from which you wish to delete the Sales Document Line.
3. In the Sales Document Lines section, select the line you wish to delete.
4. Click **Delete** (garbage can icon).

**Note:** You may also open the Sales Document Line and delete the record there.

## Sales Document Line Fields

### Currency

The currency associated with this Sales Document Line.

### Extended Unit Price Amount

The Unit Price Amount multiplied by the Quantity Count minus any discounts when calculated by the system. You may manually enter this as well. If so, the Unit Price Amount will be set to the rounded currency amount of Extended Unit Price Amount divided by Quantity Count. This is because they do not need to match mathematically. For example, you have a quantity of 4 at \$5 which is \$20. If you change the Extended Unit Price Amount to be \$19.95, it will stay at \$19.95. The Unit Price will change to \$4.99 which is actually a total of \$19.96 for the quantity of 4.

Extended Unit Price = Quantity \* Unit Price - (Quantity \* Unit Price \* Markdown Percent/100) - Markdown Amount. If any of these fields are changed the Extended Unit Price is recalculated.

### Line Number

A system-generated name created by concatenating the Sales Document Number and the Sequence Number assigned to the Sales Document Line.

**Markdown Amount**

Amount to markdown from this line. Typically, only a Markdown Amount or Markdown Percent is used but you may use both.

**Markdown Percent**

Percent to markdown from this line. Typically, only a Markdown Amount or Markdown Percent is used but you may use both.

**Markdown Percent Amount**

The amount of markdown based on the percent entered.

**Price List**

The Price List associated with the Sales Document Line.

**Product**

The Product is a good or service available to be sold.

**Quantity Count**

The quantity of the Product to be billed.

**Sales Document**

The Sales Document to which this line belongs. A parent Sales Document must exist.

**Sales Document Line Note**

Allows entry of additional information as needed for a Sales Document Line. This is an optional note you may add to the Sales Document report.

**Sequence Number**

Value used to sort the line details for the sales document. A unique number identifying the specific position of this Sales Document Line on its parent document.

**Subtotal Amount**

The Subtotal Amount is the Extended Unit Price Amount plus the Tax Amount.

**Tax Amount**

The amount of tax for the Sales Document Line.

**Unit**

The quantities in which the Product or Write-in Item is sold.

**Unit Price Amount**

The Unit Price of the product, for the specified Unit.

**Write-in Item**

A text field available to enter a non-product specific item. Typically, this is used in a one-time sale.

## **Auto Tax Calculator**

The Auto Tax Calculator section displays the Tax Schedule currently assigned to the Sales Document Line and the Document Taxes section displays the taxes that have been calculated for the Sales Document Line. A different Tax Schedule may be selected here. If the Tax Details need to



be

changed, those should be changed on the [Tax Schedule](#).

## ▸ Tax Processing

Tax Schedule

CA Tax Schedule

### Document Taxes



Document Tax Name ↑	Tax Amount	Tax Detail
2% City Tax	\$4.00	2% City Tax
3% County Tax	\$6.00	3% County Tax
6% State Tax	\$12.00	6% State Tax

# Document Tax

## Description

The Document Tax entity displays the individual Taxes that have been calculated for the lines on Opportunities, Quotes, Orders, or Invoices within Dynamics 365 and the Inogic Sales Document. This is intended to be used for reporting purposes.

If taxes need to be changed for a transaction, the changes should be made by updating the related Tax Details and Tax Schedules used on the transaction line rather than updating the transaction line or Document Tax record. Changes made on a transaction line will not affect the Document Tax and changes made to the Document Tax will not affect the transaction line.

Dynamics 365 CA 6% State

DOCUMENT TAX : INFORMATION

CA 6% State

General

Document Tax Name CA 6% State

Taxable Amount \$60.00

Entity Type Option Sales Document

Owner System Administrator

Tax Amount \$3.60

Tax Detail CA 6% State

Sales Document Line

Line Number	Sequence Number	Product	Unit	Quantity Count	Unit Price Amount	Markdown Percentage	Markdown Percentage	Markdown Amount	Extended Unit Price	Tax Amount	Subtotal Amount
INV1049 1		1 Ad Space (...	Primary U...	6.00	\$10.00			\$0.00	\$60.00	\$6.60	\$66.60

## View Document Tax

1. Open the Configuration Page under **Dynamics 365 | Sales | Settings | Solutions**.
2. Open the Auto Tax Calculator solution.
3. Click **Configuration**.
4. Click **Entities**.
5. Click **Document Taxes**.

**Note:** You can also access the Document Taxes from the transaction itself. For example, from an Invoice, open the Product Line and expand the Auto Tax Calculator section and select the Document Tax you want to review.

## Document Tax Fields

### Document Tax Name

Document Number, Invoice ID, etc. and Tax Detail concatenated together

### Entity Type Option

The type of entity to which this Document Tax is applied.

**Tax Amount**

The amount of tax calculated for the associated Tax Detail on the transaction.

**Tax Detail**

The Tax Detail associated with this record.

**Taxable Amount**

The amount of the document that is subject to tax for this Tax Detail.

**Sales Document Line**

The Sales Document Line section displays the Sales Document Line the Document Tax record is associated with.

Sales Document Line

Line Number	Sequence Number	Product	Unit	Quantity	Count	Unit Price Amount	Markdown Percentage	Markdown Percentage	Markdown Amount	Extended Unit Price	Tax Amount	Subtotal Amount
INV1049 1	1	Ad Space (Week...	Primary Unit	6.00		\$10.00			\$0.00	\$60.00	\$6.60	\$66.60

# AvaTax

## Description

Auto Tax Calculator can integrate with Avalara's AvaTax product. AvaTax calculations will be used when the Avalara License field in Inogic Settings is populated with the License Key provided by Avalara.

For questions regarding AvaTax, contact Avalara at [www.avalara.com](http://www.avalara.com).

## Inogic Settings

Inogic Settings stores the Avalara information in order to integrate with Auto Tax Calculator.

The screenshot shows the Dynamics 365 user interface. The top navigation bar includes 'Dynamics 365', 'Settings', and 'Solutions'. Below this is a toolbar with various actions like 'NEW', 'DEACTIVATE', 'DELETE', 'PROCESS', 'ASSIGN', 'SHARE', 'EMAIL A LINK', 'RUN WORKFLOW', and 'START DIALOG'. The main content area is titled 'Rockton Setting : TAX PROCESSING' and 'Rockton Setting'. It features a sidebar with navigation links: 'General', 'Reporting', 'External Integrations', and 'Tax Processing'. The 'Tax Processing' section is active, displaying a table of settings for Avalara integration.

Avalara License	0000xxxxx00000	Avalara Account	Testxxxxx000
Avalara Company Code	Test Company	Avalara Profile Name	Test
Avalara URL	Avalara.com	Avalara Via URL	avalara.com
Enable Avalara Address Validation	No	Avalara Default Ship From Address	Main
Rockton WCF Taxes Service URL	Avalara.com		

## Avalara Auto Tax Calculator Fields

### Avalara Account

Account ID assigned by Avalara when you register for their product.

### Avalara Company Code

Identifies the company that helps Avalara access your company's tax profile.

### Avalara Default Ship From Address

The default Ship From address of the customer to use in calculating taxes if an address does not exist on the record where taxes are being calculated.

### Avalara License

The license key assigned by Avalara for their product. If this field is populated, Auto Tax Calculator knows to use Avalara instead of the Tax Schedules on the transaction lines.

**Avalara Profile Name**

A profile name assigned by Avalara when registered for their service.

**Avalara URL**

URL to the Avalara Web Service used for Auto Tax Calculator.

**Avalara Via URL**

URL to the Avalara Web Service used for Auto Tax Calculator.

**Enable Avalara Address Validation**

Flag to turn Tax Address Validation on or off. This will be No unless you have registered for Avalara.

**Inogic WCF Taxes Service URL**

The URL of the Inogic Azure Cloud Service that communicates with Avalara to perform Auto Tax Calculator.

## Documents

The Avalara AvaTax runs behind the scenes. The system sends a call to Avalara to get the tax calculation. Avalara uses the Ship To Address fields to calculate the tax for each line based on geographical location. The data returned from Avalara has the needed information for each Tax Detail that would exist within the geolocation and the tax amounts for each. With this information, the system will create new Tax Detail records if they do not already exist. Then, a Document Tax is created for each Tax Detail and associates it to the line. Lastly, it sums the Tax Amounts from the Document Taxes and updates the document line with a new Tax Amount.

## Avalara AvaTax Auto Tax Calculator Fields

**Avalara Adjustment Description**

Used with Avalara Adjustment Reason. When Other is selected for the reason use this field for more explanation.

**Avalara Adjustment Reason**

Classification for Avalara to explain why the original document has been modified.

**Avalara Cancel Code**

Reason to Avalara as to why the record was cancelled.

**Avalara Doc ID**

The unique Document ID returned from Avalara. This is the document stored in Avalara.

**Avalara Doc Status**

The status of the document in Avalara after taxes have been calculated.

**Avalara Is Reconciled**

Determines if the record in Avalara has been reconciled.

**Avalara Is Locked**

Determines if the record is locked in Avalara.

**Avalara Tax Date**

The date used by Avalara to calculate tax on the Document.

**Avalara Transaction ID**

Transaction ID returned from Avalara. This is mainly used for troubleshooting purposes.

# Workflows and Dialogs

- Dialogs
- Workflow Launcher
- Workflow Trigger



# Dialogs

## Avalara Auto Tax Calculator (Sales Document Line)

The Avalara Auto Tax Calculator dialog is used to make calls back and forth to Avalara. This will send needed information to Avalara as well as Avalara returning needed information. These calls use a web service and are run in the background. Due to this, it is important to remember that these calls are not immediately executed. After they are executed, these jobs will run quite fast.

Here is a summary of the available Avalara AvaTax calls available in the Avalara Auto Tax Calculator dialog. For more detailed information review the Avalara documentation.

### **Adjust Tax**

Adjusts the tax for the document. It also reconciles the tax history to ensure client data matches the AvaTax history. If the document has a Document Status of 'Locked', adjustments cannot be made.

### **Cancel Tax**

Cancels a previously calculated tax. It is only available on documents that have an Avalara Document Type of either Sales Invoice or Purchasing Invoice. If the document is not posted, then the Cancel Tax will delete the Tax. If it has been posted, it will revert it to a Saved status.

### **Commit Tax**

Moves a Tax Document in Avalara to a Committed state. AvaTax initially appears as Uncommitted and do not appear in Avalara reporting until they are Committed.

### **Get Tax**

Retrieves the tax amounts from Avalara based on the Ship To Address. If the Ship To field is blank, it will use default assigned in the Inogic Settings for default Ship To Address. When called, it will create Tax Details if the specified Tax Detail does not already exist. It then create a Document Tax using the Tax Detail. The Tax Amount field on the line will be calculated based on the Document Taxes. The Document Taxes are calculated to get the document's total Tax Amount.

### **Ping Service**

Allows you to test the internet connection and validate the Avalara Credentials.

### **Post Tax**

A document needs to be posted before it can be committed. This sets the AvaTax Document Status to Posted.

### **Validate Address**

Corrects, verifies, and formats an address according to the USPS database standard. For a given document, it will use the Ship To Address and update the document with the correctly formatted address. This is only available for US and Canada addresses. For this to work, the Inogic Setting 'Enable Avalara Address Validation' must be turned on.

## Run Dialog

The dialog can be accessed through the following entities.

- Opportunity
- Opportunity Product
- Quote
- Quote Product
- Order
- Order Product
- Invoice
- Invoice Product
- Sales Document
- Sales Document Line

1. Open a Document, for example **Dynamics 365 | Sales | Auto Tax Calculator | Invoice**.
2. Select the Invoice you wish to run the dialog.
3. Click **Start Dialog**.
4. Select **Avalara Auto Tax Calculator**.
5. Click **Add**.
6. Mark the call you wish to run and click **Next**.
7. Click **Finish**.

# Workflow Launcher

## Description

The Workflow Launcher entity is a configuration to run a custom workflow assembly that launches a workflow on child records for a given entity. This is typically used by an administrator.

The screenshot shows the Dynamics 365 interface for configuring a Workflow Launcher. The top navigation bar includes 'Dynamics 365', 'Settings', and 'Solutions'. Below this is a ribbon with tabs: '+ NEW', 'DEACTIVATE', 'DELETE', 'PROCESS', 'ASSIGN', 'SHARE', 'EMAIL A LINK', 'RUN WORKFLOW', and 'START DIALOG'. The main content area is titled 'WORKFLOW LAUNCHER : INFORMATION' and 'Update Tax Schedule'. Under the 'General' tab, the following fields are visible:

Workflow Launcher Name *	Update Tax Schedule	Owner *	System Administrator
Child Workflow Entity *	Tax Schedule	Child Workflow *	Update Taxes
Base On Advanced Find *	--	Use Input Record in Filter	No
Description	Update Tax Schedules with new details		

## Create a Workflow Launcher

1. Open the Workflow Launcher from the Configuration page under **Dynamics 365 | Sales | Settings | Solutions**.
2. Open the **Auto Tax Calculator** solution.
3. Click **Configuration** and then click **Entities**.
4. Click **Workflow Launcher**.
5. Click **+New**.
6. Enter the necessary information.
7. Click **Save**.

## Edit a Workflow Launcher

1. Open the Workflow Launcher from the Configuration page under **Dynamics 365 | Sales | Settings | Solutions**.
2. Open the **Auto Tax Calculator** solution.
3. Click **Configuration** and then click **Entities**.
4. Click **Workflow Launcher**.
5. Open the Workflow Launcher you wish to edit.
6. Make the necessary changes,
7. Click **Save**.

## Delete a Workflow Launcher

1. Open the Workflow Launcher from the Configuration page under **Dynamics 365 | Sales | Settings | Solutions**.
2. Open the **Auto Tax Calculator** solution.
3. Click **Configuration** and then click **Entities**.
4. Click **Workflow Launcher**.
5. Mark the Workflow Launcher you wish to delete.
6. Click **Delete**.

## Workflow Launcher Fields

### **Base on Advanced Find**

The source query of records for which the Child Workflow will run against, one workflow per record.

### **Child Workflow**

The workflow that will be launched once per record from the Advanced Find query.

### **Child Workflow Entity**

The entity on which the Child Workflow is based.

### **Description**

A brief description of the workflow launcher and how it may be used.

### **Use Input Record in Filter**

Option to use the Input Entity Record as an additional filter in the Advanced Find Query, setting it equal to the Output Entity Filter Attribute.

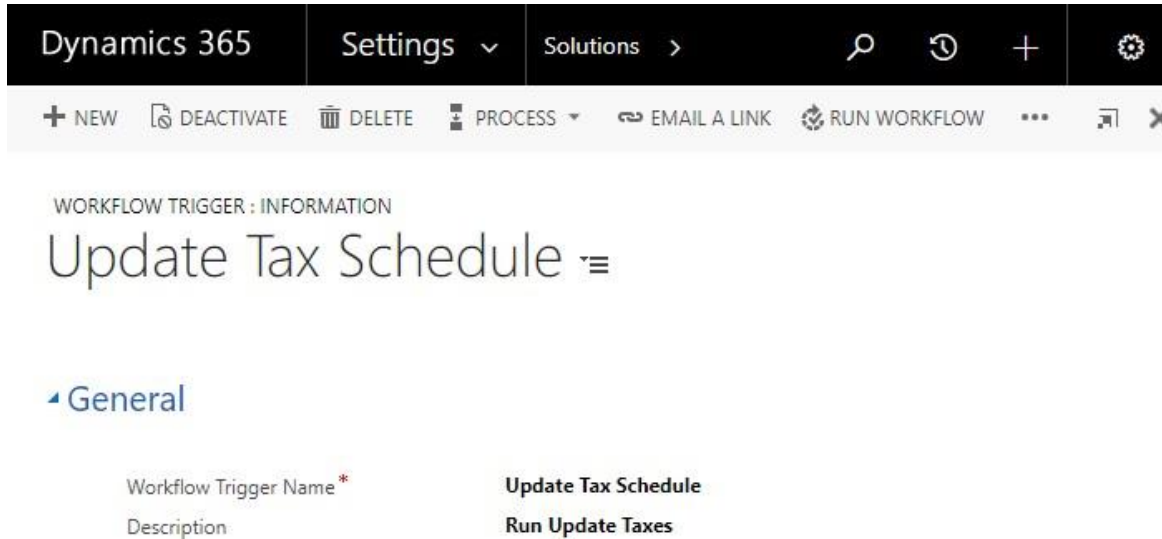
### **Workflow Launcher Name**

A descriptive name of the Workflow Launcher.

# Workflow Trigger

## Description

The Workflow Trigger entity is used to trigger timed workflows for running periodic processes.



## Create a Workflow Trigger

1. Open the Workflow Launcher from the Configuration page under **Dynamics 365 | Sales | Settings | Solutions**.
2. Open the **Auto Tax Calculator** solution.
3. Click **Configuration** and then click **Entities**.
4. Click **Workflow Trigger**.
5. Click **+New**.
6. Enter the necessary information.
7. Click **Save**.

## Edit a Workflow Trigger

1. Open the Workflow Launcher from the Configuration page under **Dynamics 365 | Sales | Settings | Solutions**.
2. Open the **Auto Tax Calculator** solution.
3. Click **Configuration** and then click **Entities**.
4. Click **Workflow Trigger**.
5. Open the Workflow Trigger you wish to edit.
6. Make the necessary changes.
7. Click **Save**.

## Delete a Workflow Trigger

1. Open the Workflow Launcher from the Configuration page under **Dynamics 365 | Sales | Settings | Solutions**.
2. Open the **TaxProcessing** solution.
3. Click **Configuration** and then click **Entities**.
4. Click **Workflow Trigger**
5. Mark the Workflow Trigger you wish to delete.
6. Click **Delete**.

## Workflow Trigger Fields

### Description

A brief description explaining for what the Workflow Trigger will be used.

### Workflow Trigger Name

Descriptive name of the Workflow Trigger

# Reporting

- Attachable Report

# Attachable Report

## Description

The Attachable Report entity allows you to generate a Word document report and attach it to an email so you may email Sales Documents/Invoices.

The screenshot shows the Dynamics 365 interface for the 'Attachable Report' entity. The top navigation bar includes 'Dynamics 365' and 'Sales Document Wor...'. Below the navigation bar is a ribbon with tabs: '+ NEW', 'DEACTIVATE', 'DELETE', 'PROCESS', 'ASSIGN', 'SHARE', 'EMAIL A LINK', 'RUN WORKFLOW', 'START DIALOG', and a menu icon. The main content area displays the title 'ATTACHABLE REPORT : INFORMATION' and 'Sales Document Word Document T...'. A 'General' tab is selected. The form contains several fields: 'Attachable Report Name' (with a red asterisk), 'Sales Document Word Document Template', 'Owner' (with a red asterisk), and 'System Administrator' (with a user icon). Below these are 'Report Technical Name' (with a red asterisk), 'Sales Document', 'Output Name Option' (with a red asterisk), 'Output Name Constant', and 'Document Number' (with a document icon and a double dash).

## Create an Attachable Report

1. Open the Attachable Report entity under **Dynamics 365 | Sales | Settings | Solutions**.
2. Open the **Auto Tax Calculator** solution.
3. Click **Configuration** from the list and then click the **Entities** button.
4. Click **Attachable Reports**.
5. Click **+New**.
6. Enter the necessary fields.
7. Click **Save**.

## Edit an Attachable Report

1. Open the Attachable Report entity under **Dynamics 365 | Sales | Settings | Solutions**.
2. Open the **Auto Tax Calculator** solution.
3. Click **Configuration** from the list and then click the **Entities** button.
4. Click **Attachable Reports**.
5. Open the Attachable Report record you wish to change.
6. Make the needed changes.
7. Click **Save**.

## Delete an Attachable Report

1. Open the Attachable Report entity under **Dynamics 365 | Sales | Settings | Solutions**.
2. Open the **Auto Tax Calculator** solution.
3. Click **Configuration** from the list and then click the **Entities** button.
4. Mark the **Attachable Report** you wish to delete.
5. Click **Delete**.



## **Attachable Report Fields**

### **Attachable Report Name**

The friendly name of the Attachable Report used in lookups.

### **Output Name Constant**

When the Output Name Option is set to Constant, this is the value to use for the root name of the report. It must meet the operating system filename standards.

### **Output Name Option**

Option to set the name of the output file to the Document Number or a Constant value.

### **Report Technical Name**

The technical name of the report and how it is displayed in SSRS.