Auto Tax Calculator

User Manual

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Limitation of Liability

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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
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- Inogic License
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- Inogic Setting
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- System Message Log
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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:

Default Auto Tax Calculator User:

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

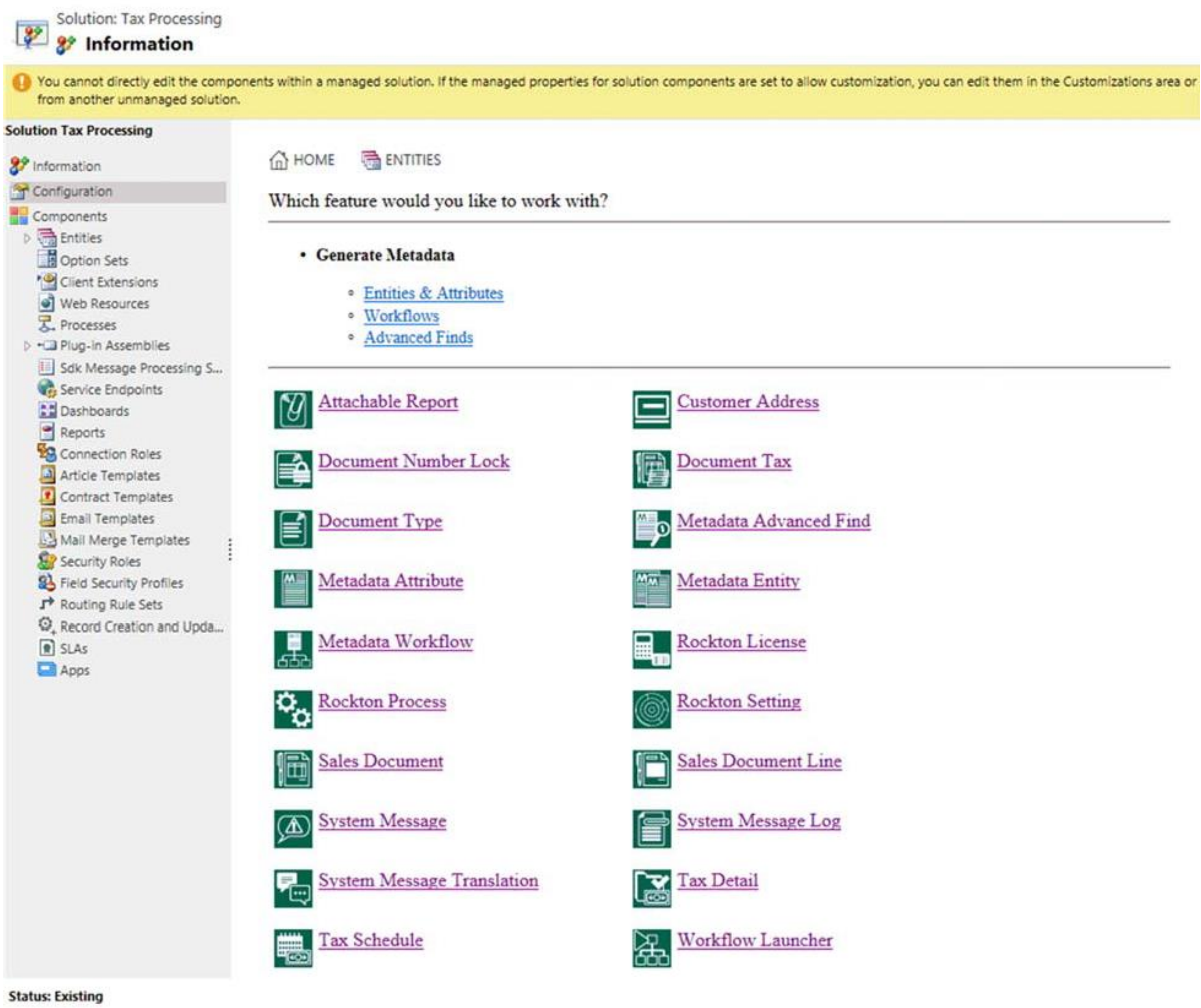
1. Open the User entity under **Dynamics 365 | Sales | Settings | Security**.
2. Click **Users**.
3. Open the User to whom you wish to assign the **Auto Tax Calculator Admin** or **Auto Tax Calculator User** role.
4. Click **Manage Roles** button.
5. Mark **Auto Tax Calculator Admin** or **Auto Tax Calculator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

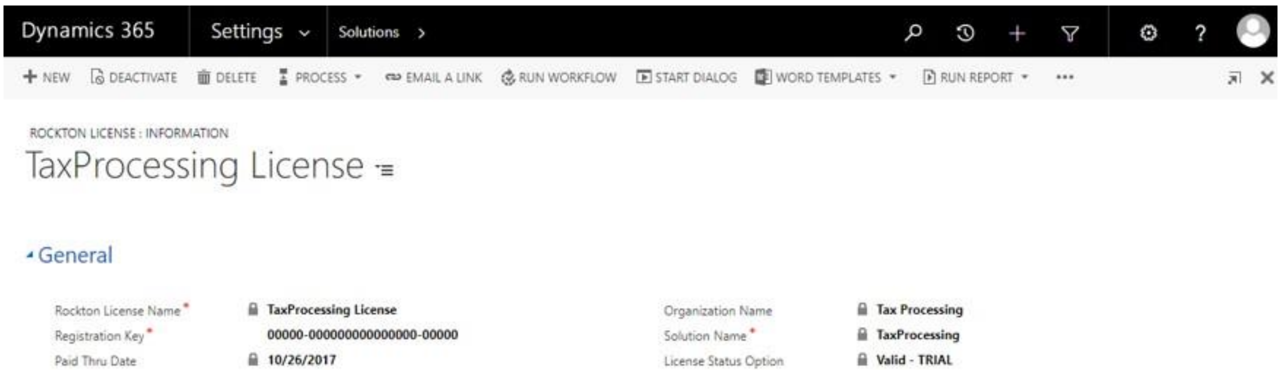
The Generate Metadata process will add custom Entities & Attributes, Workflows, and Advanced Finds to be viewable in lookups. If something is no appearing in a lookup, you will need to Generate Metadata.

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.



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 toview.

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.

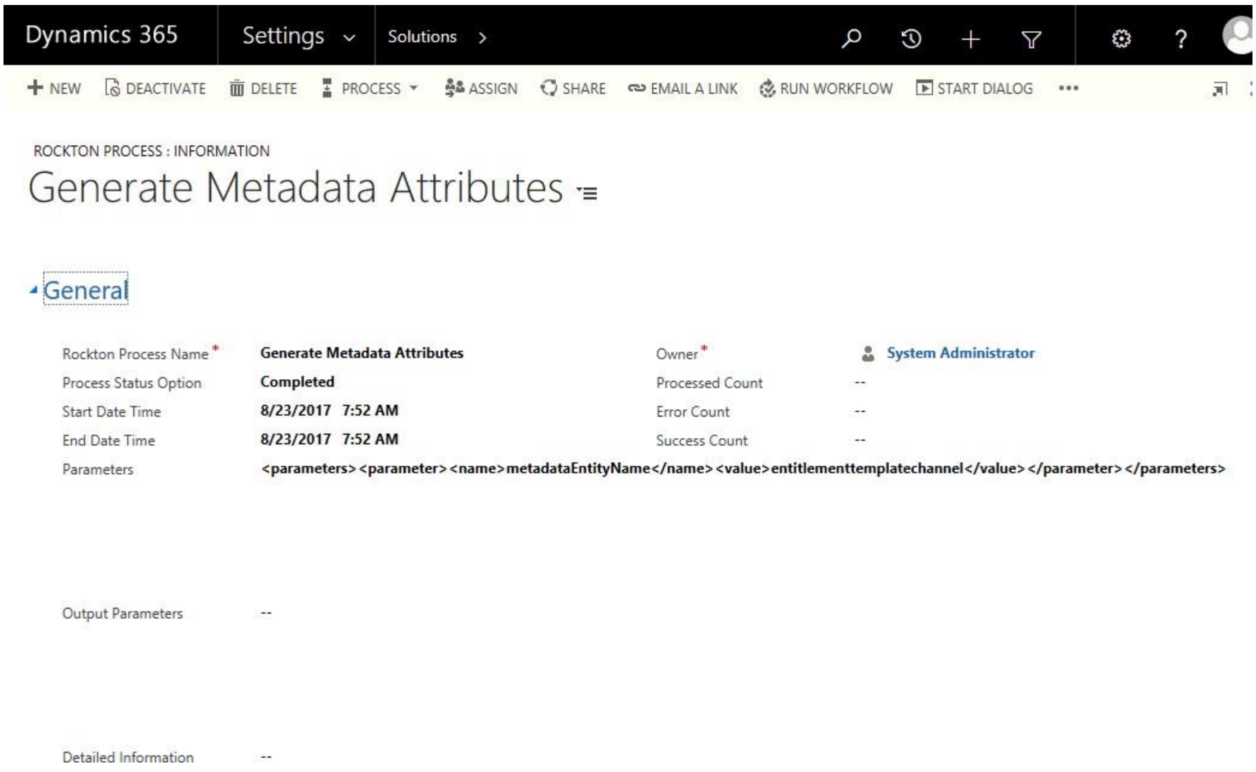
Inogic License Name
The name of the Inogic License.

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.



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.

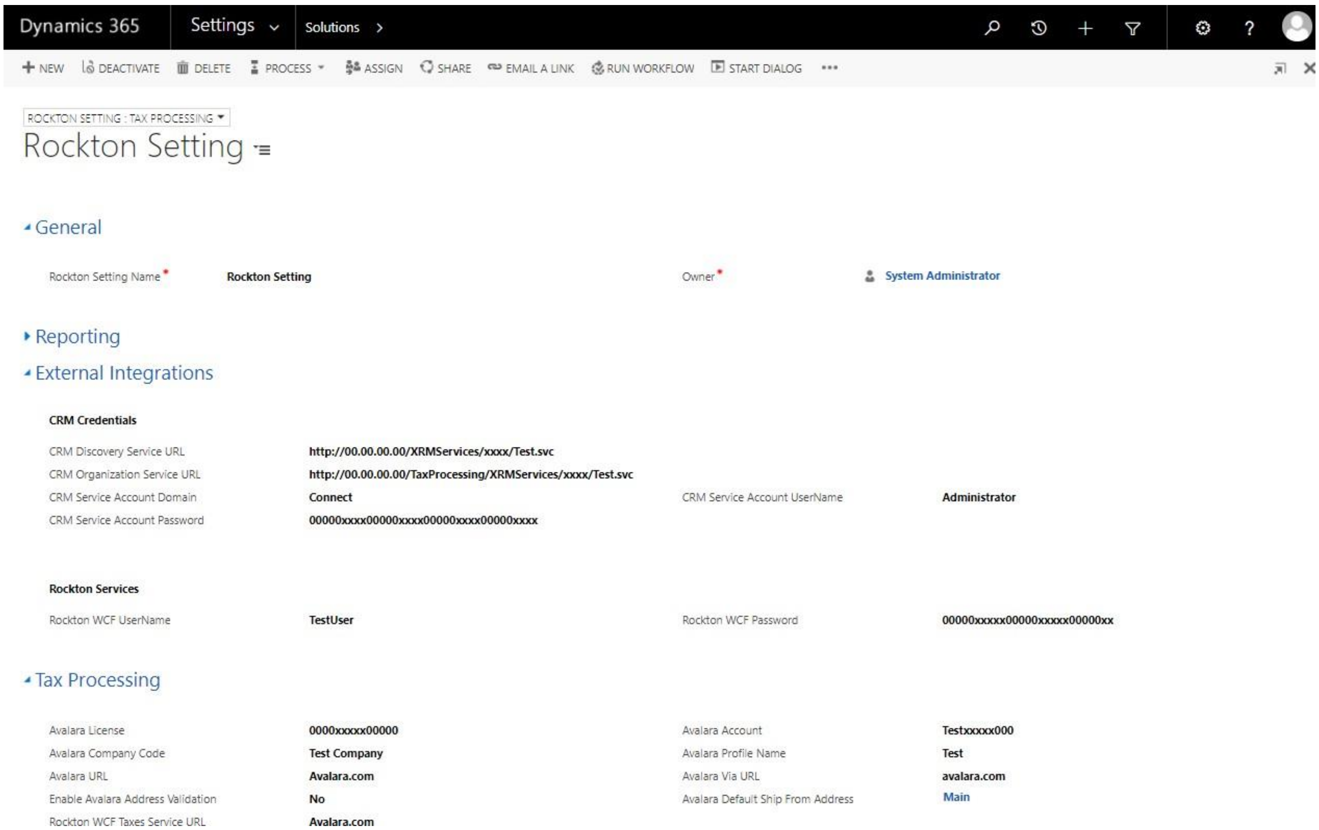
Start Date Time
Date and time in which the process was initiated.

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.



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.

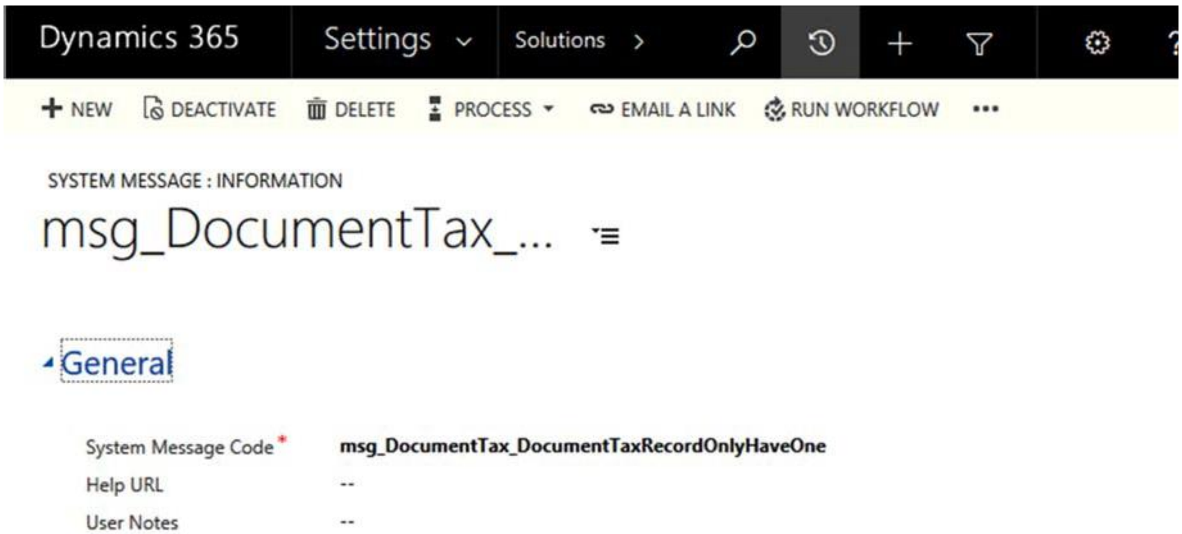
Enable Avalara Address Validation
Flag to turn Tax Address Validation on or off. This will be No unless you have registered for Avalara.

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.

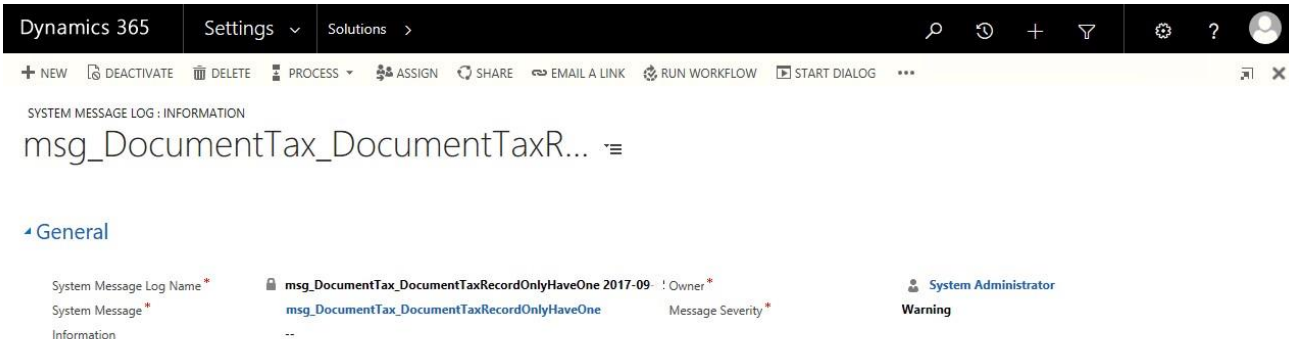
System Message Code
The code for the System Message. It is a unique code that is used to translate the System Message.

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.

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.

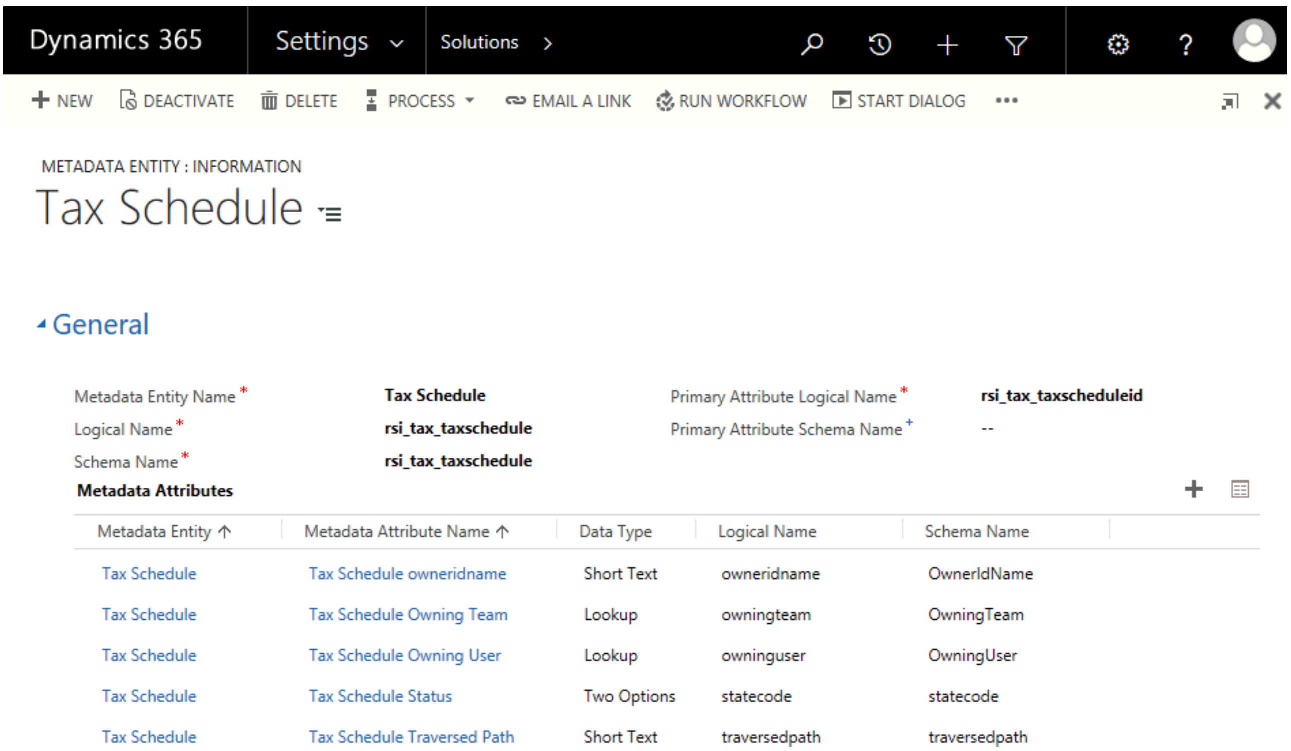
System Message Translation Name

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.



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.

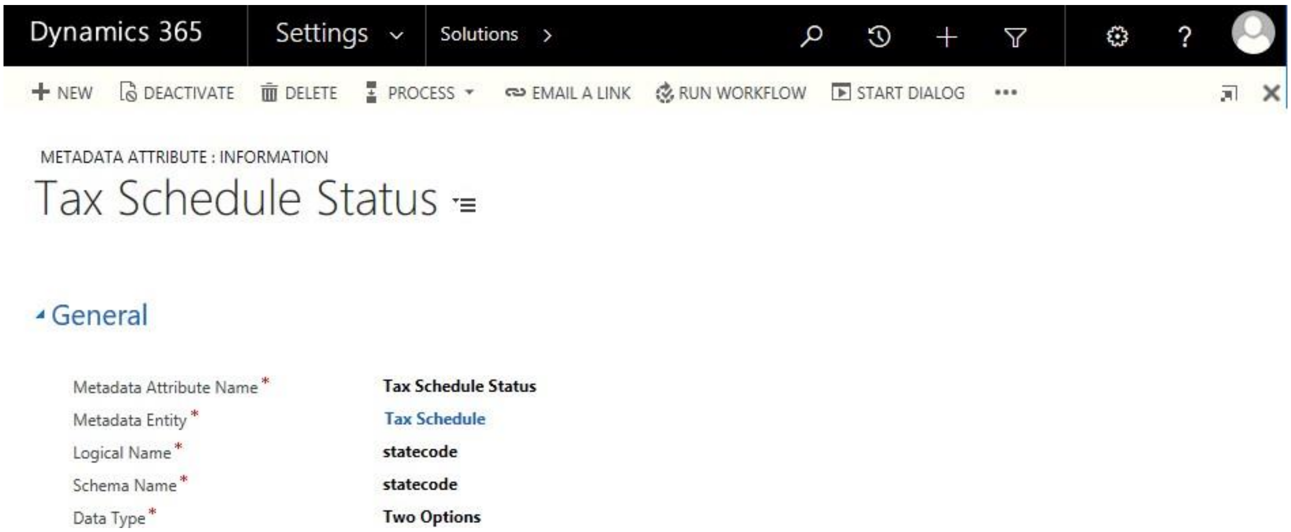
Metadata Attributes

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

Metadata Attribute

Description

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



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.

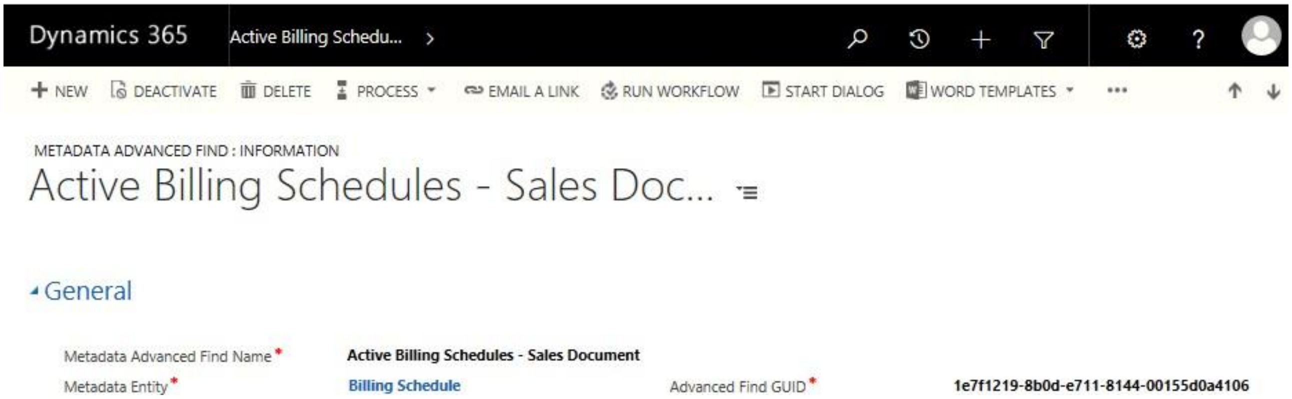
Metadata Entity
The Metadata Entity associated with the Metadata Attribute being displayed.

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

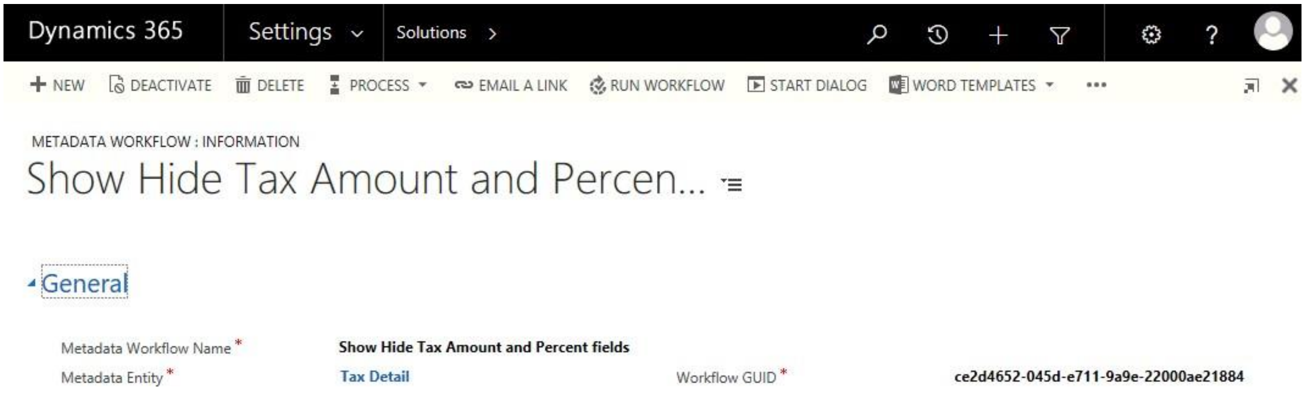
Name of the Metadata Advanced Find. This will come from the Advanced Find Name.

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.



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.

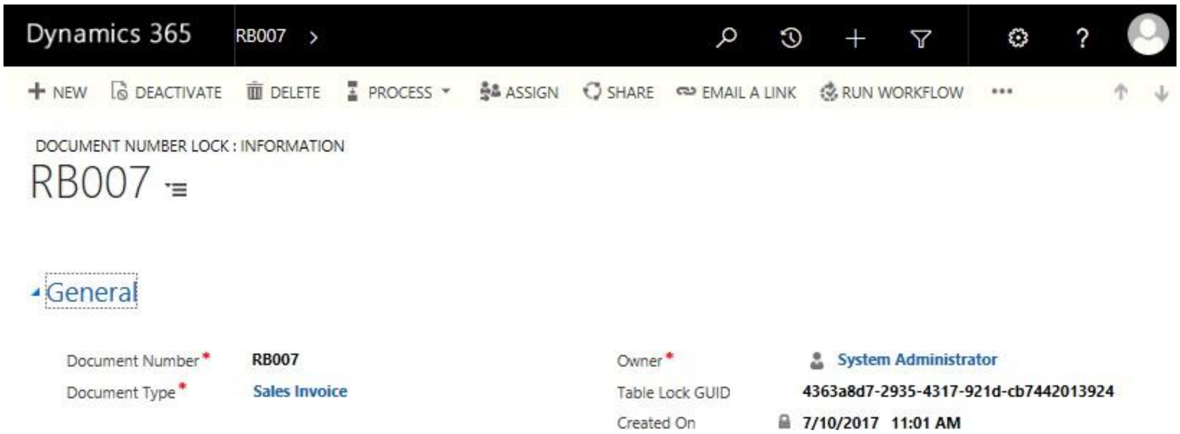
Workflow GUID
An alphanumeric string representing the GUID of the Workflow record. This is generated upon creation of the Workflow record.

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

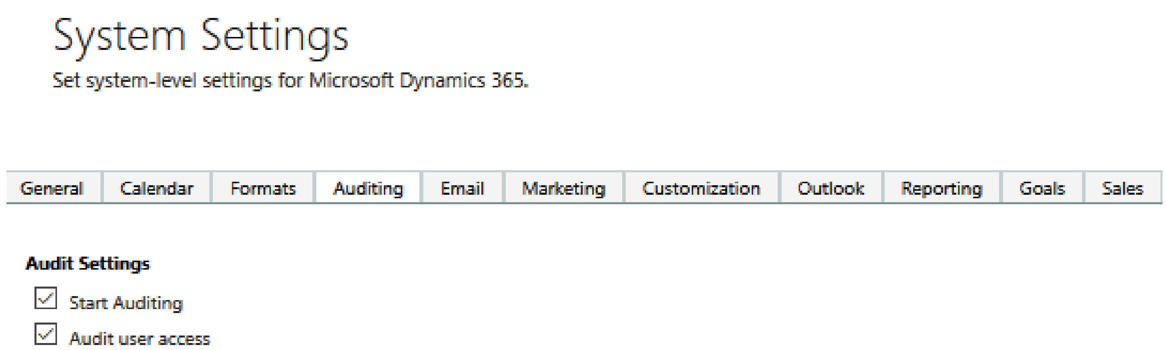
CRM Settings

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.

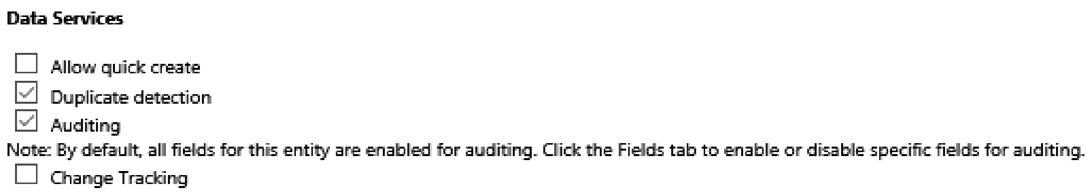
Here are the steps to enable auditing:

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**.

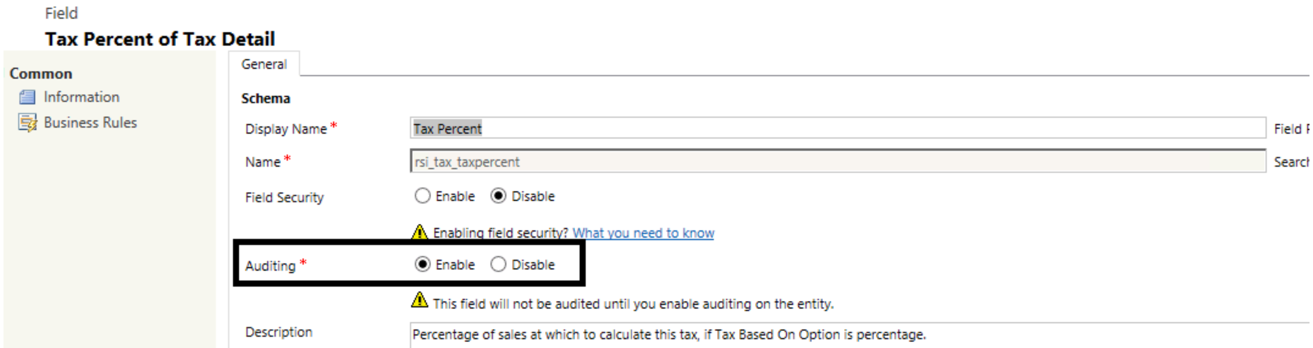


By default, auditing is automatically marked on many entity and fields in Auto Tax Calculator but you will need to determine what specifically you would like to audit and verify it is marked appropriately. To verify whether an entity or field is marked to audit, you can review the entity.

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.



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**.



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

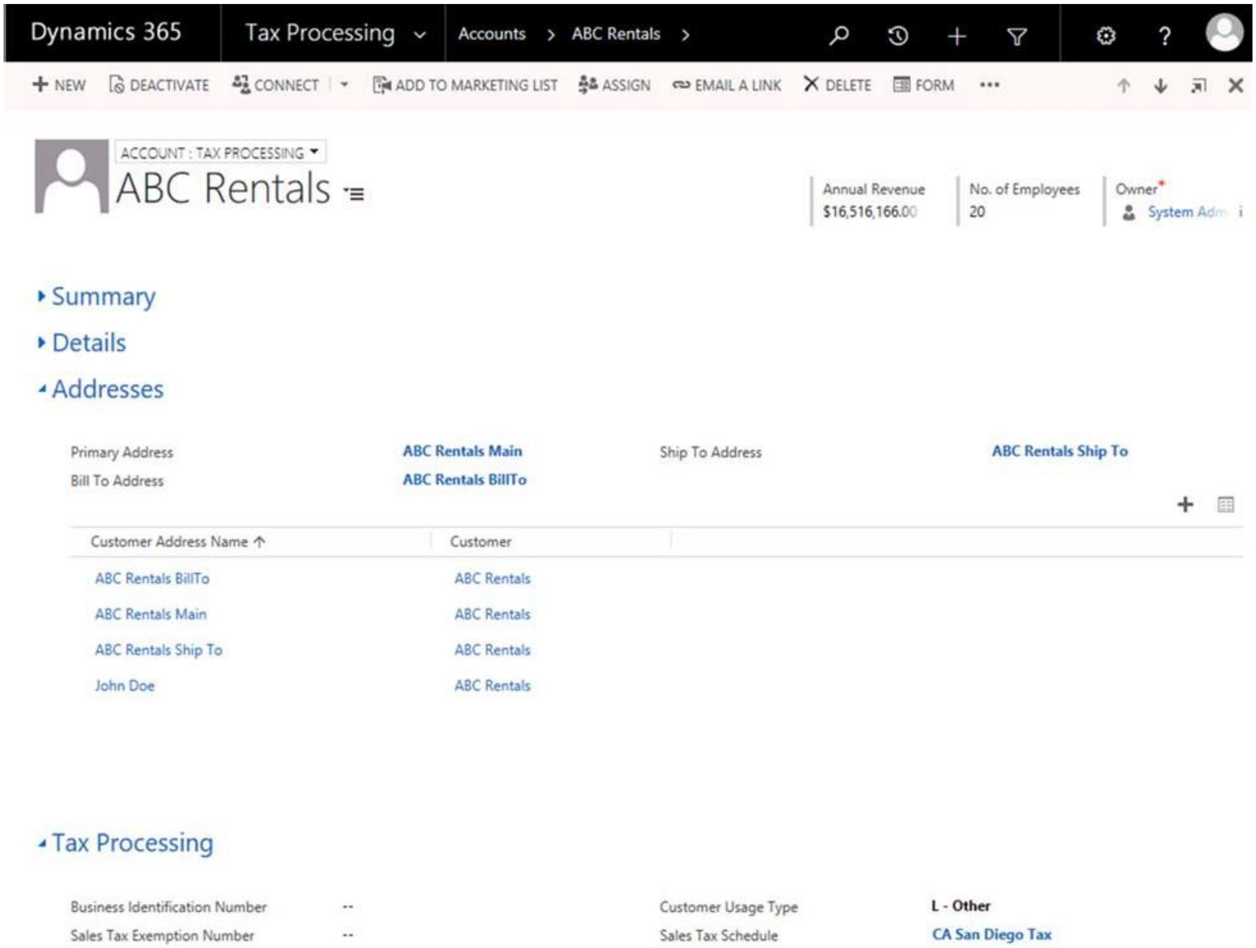
By default, the Auto Save feature in Dynamics 365 is turned on. When it is turned on, it will trigger a save every 30 seconds. When you turn it off, a Save and Save & Close buttons will be added to forms and it will not save until you click one of those options. We recommend you turn the Auto Save off. 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'.

Account

Description

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



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.

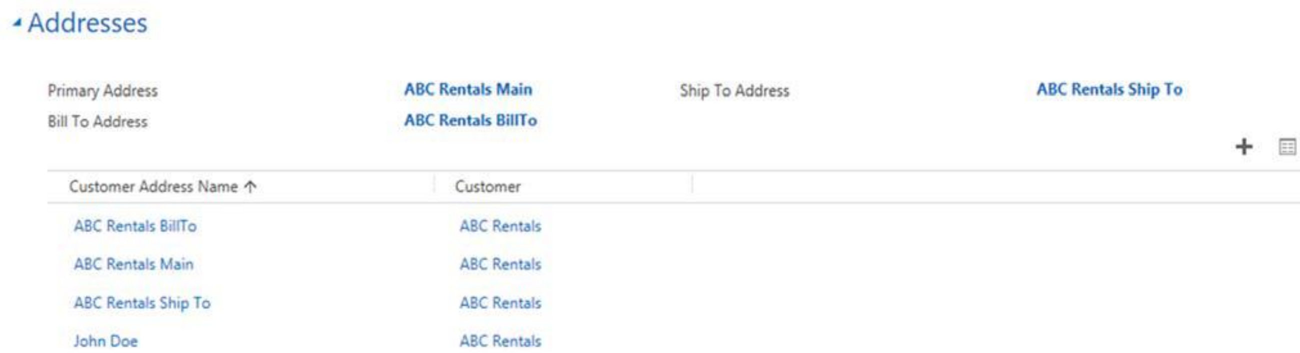
Addresses

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.



Auto Tax Calculator

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

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).

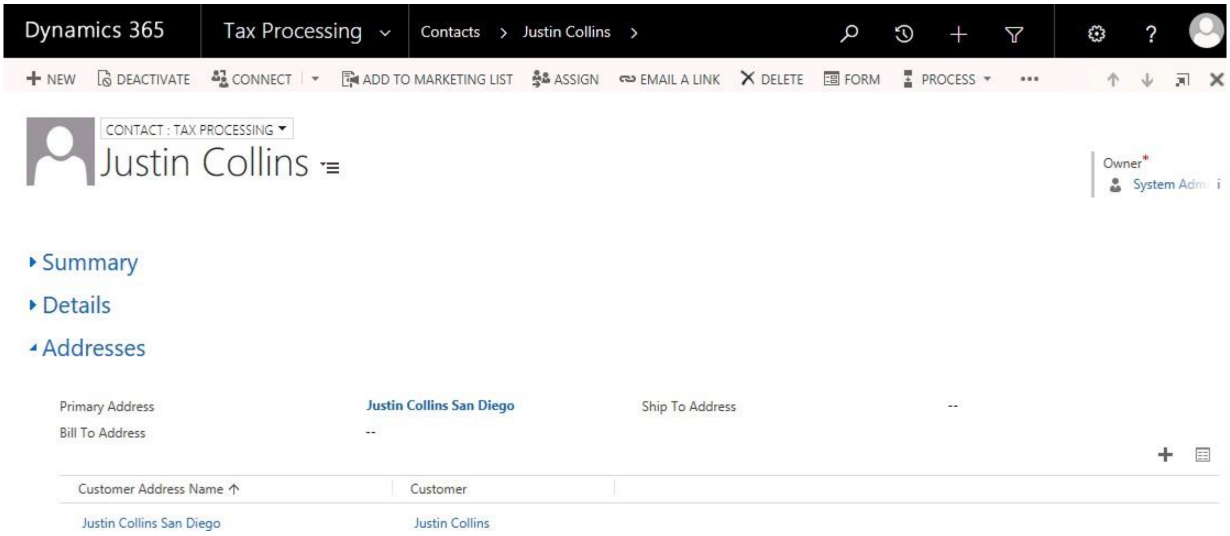
Sales Tax Exemption Number
Number assigned to the Account for tax exemption. Any value set in this field will cause the document or line to be exempt from taxes.

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.



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

View Account Information

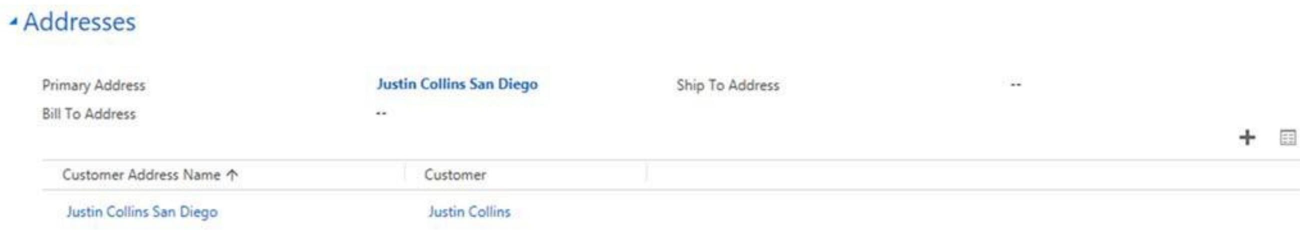
1. Open the Contact entity under **Dynamics 365 | Sales | Auto Tax Calculator | Contacts**.
2. Open the Contact to review.
3. Click **Auto Tax Calculator** to expand the section.

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.



Auto Tax Calculator

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

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.

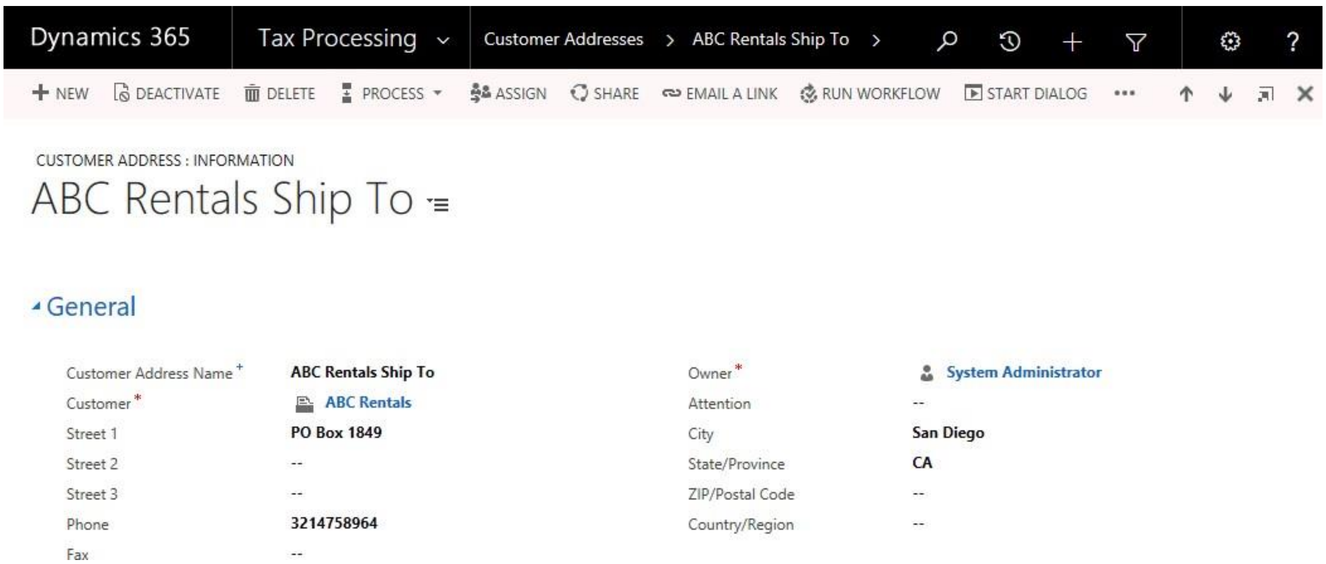
Customer Address

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.



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.

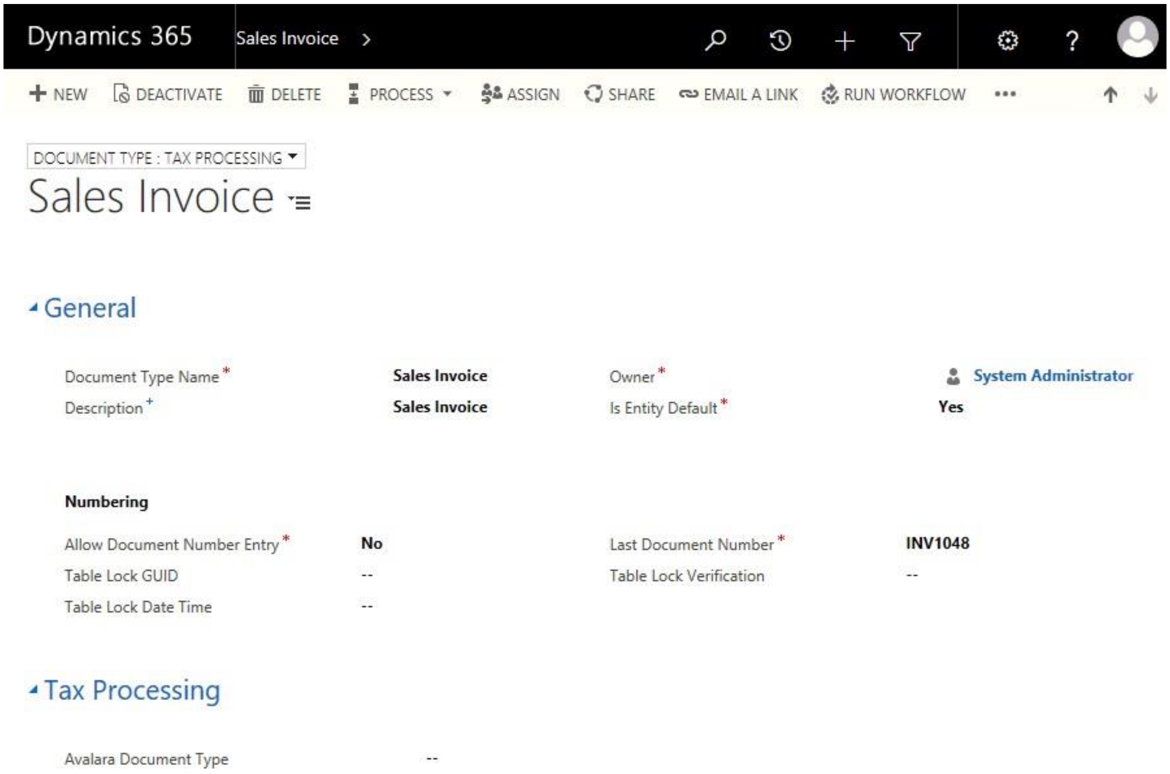
Zip/Postal Code
Zip code associated with the address.

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.



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

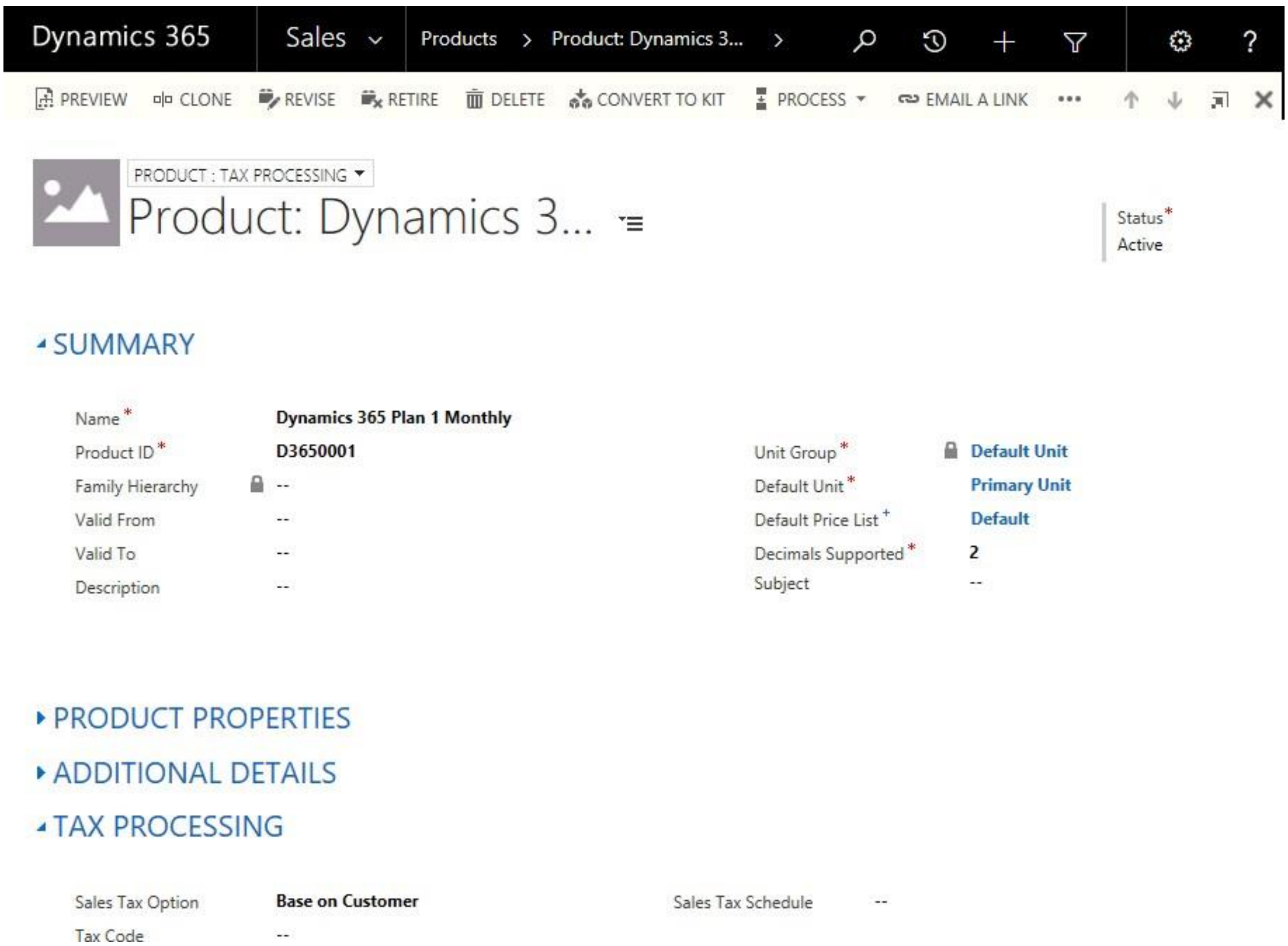
Avalara Document Type
The corresponding Avalara Document Type that will be sent to Avalara for calculating taxes.

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.



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

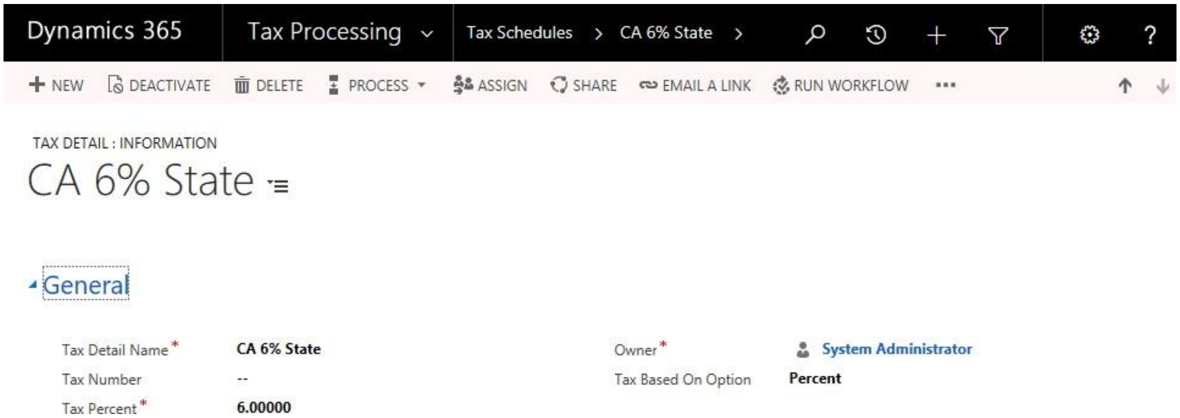
Sales Tax Schedule
The Sales Tax Schedule assigned to the Product. This Tax Schedule will be used when the Product is used on transactions and the Products Sales Tax Option is set to Taxable.

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.



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.

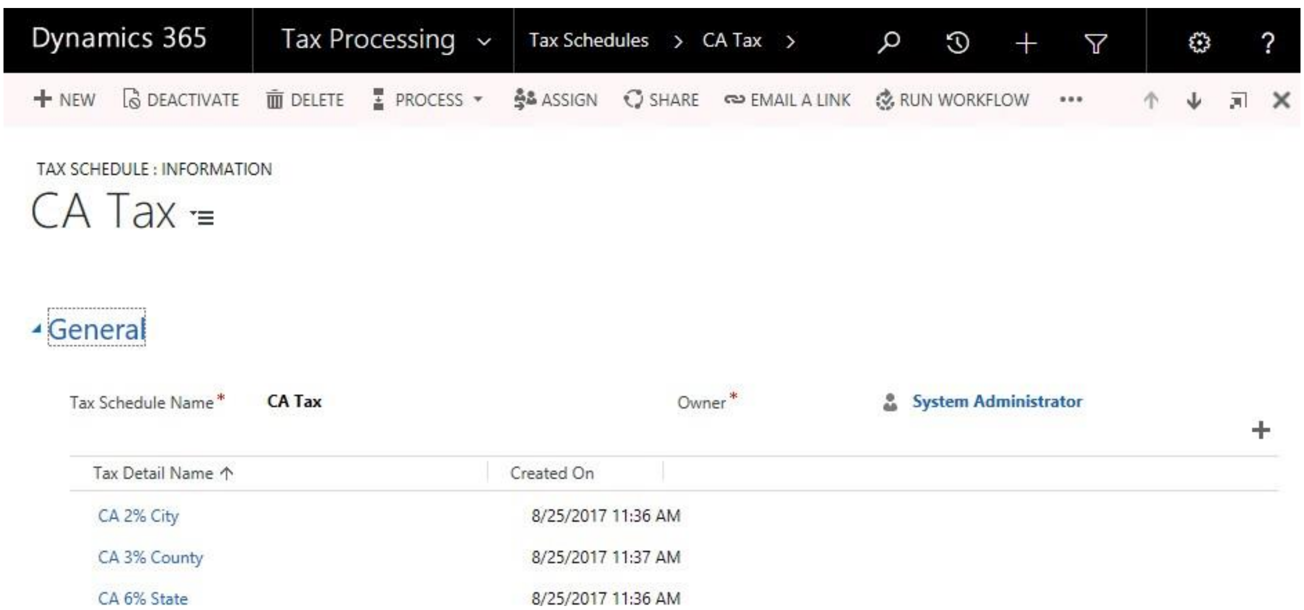
Tax Schedule

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.



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 toedit.
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

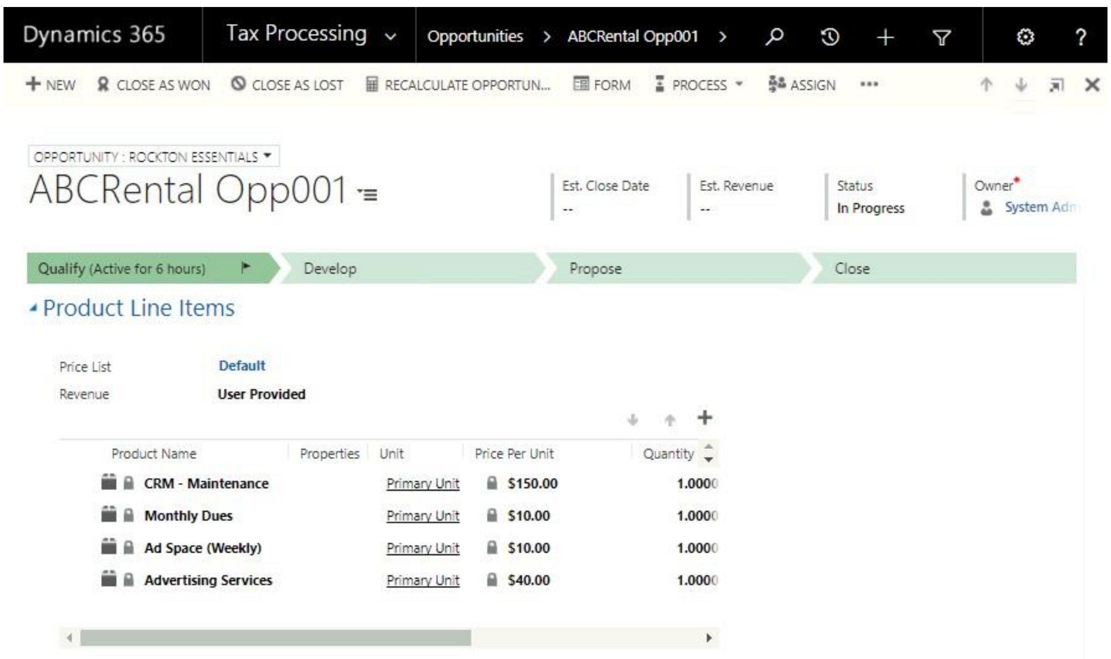
Transactions

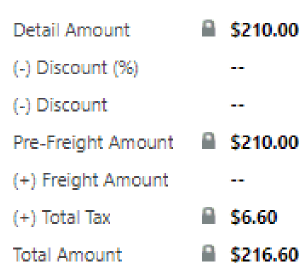
- Opportunity
- Opportunity Products
- Quote
- Quote Products
- Order
- Order Products
- Invoice
- Invoice Products
- Sales Document
- Sales Document Lines
- Document Tax
- AvaTax

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.



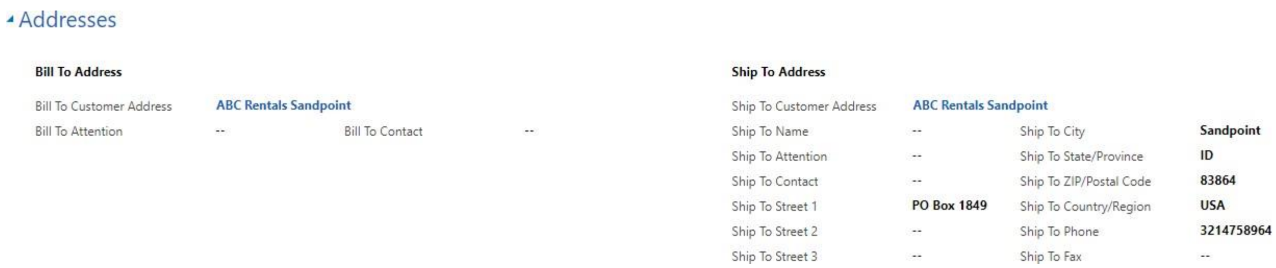


Note: To see this section, use the Opportunity: Inogic Essentials form as your default.

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.



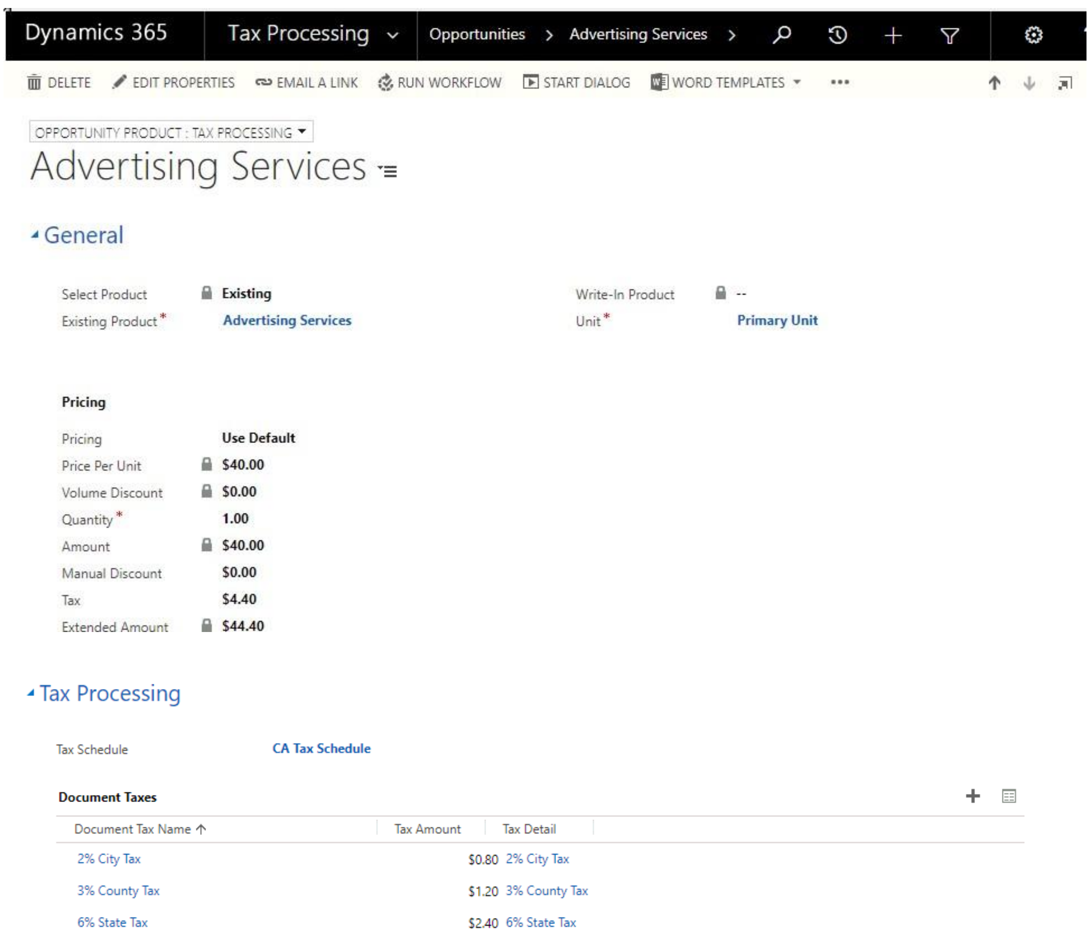
Opportunity Product

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.



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

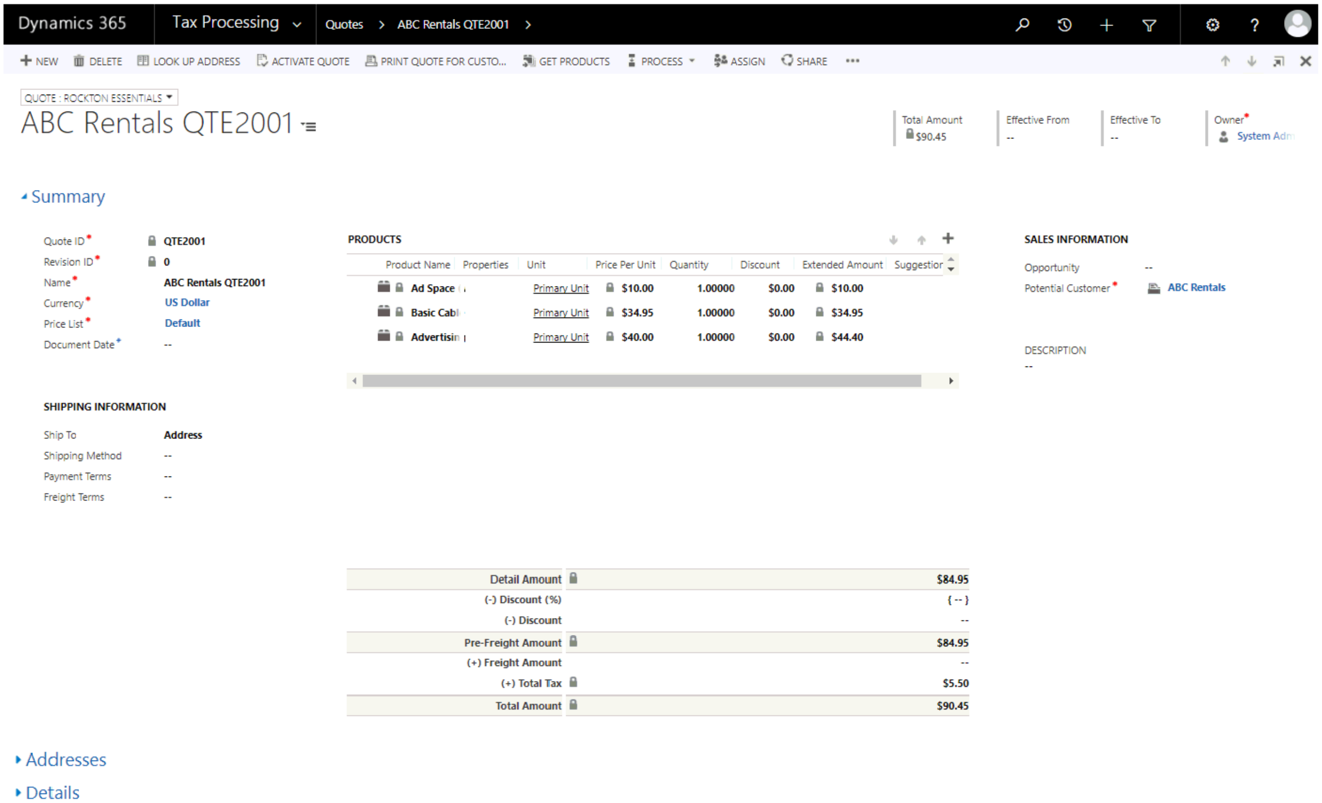
Schedule.


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.



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.

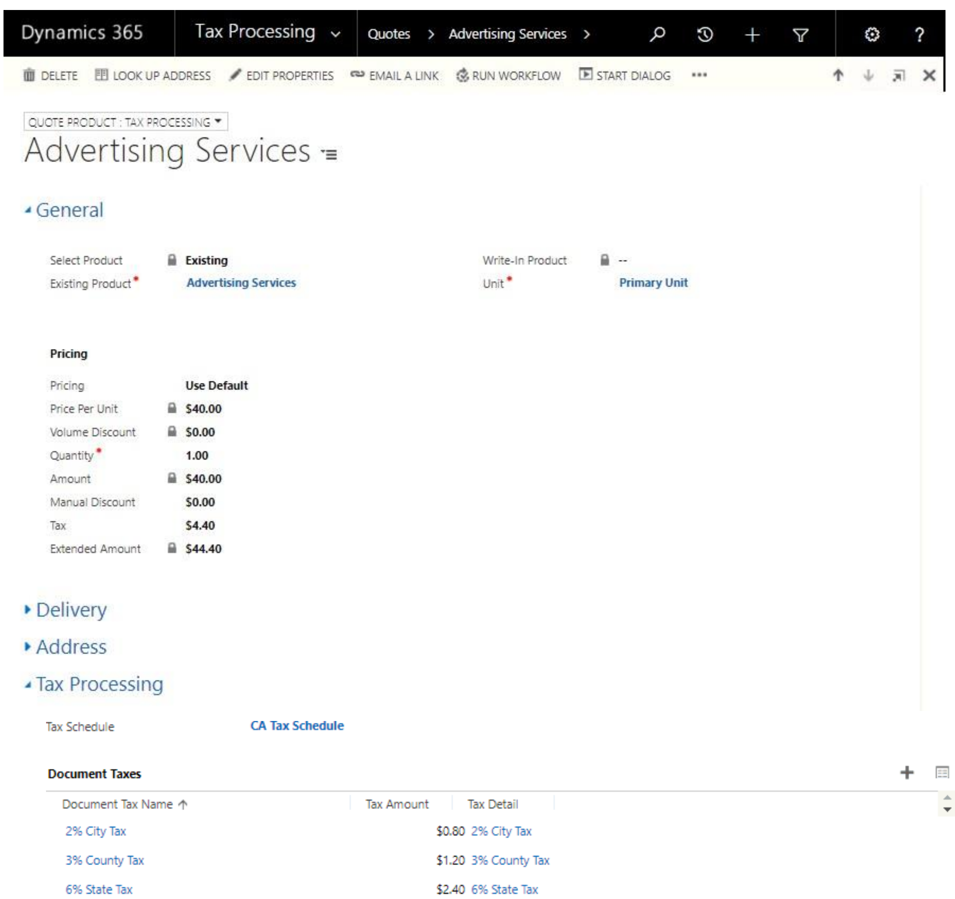
Quote Product

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.



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

Tax

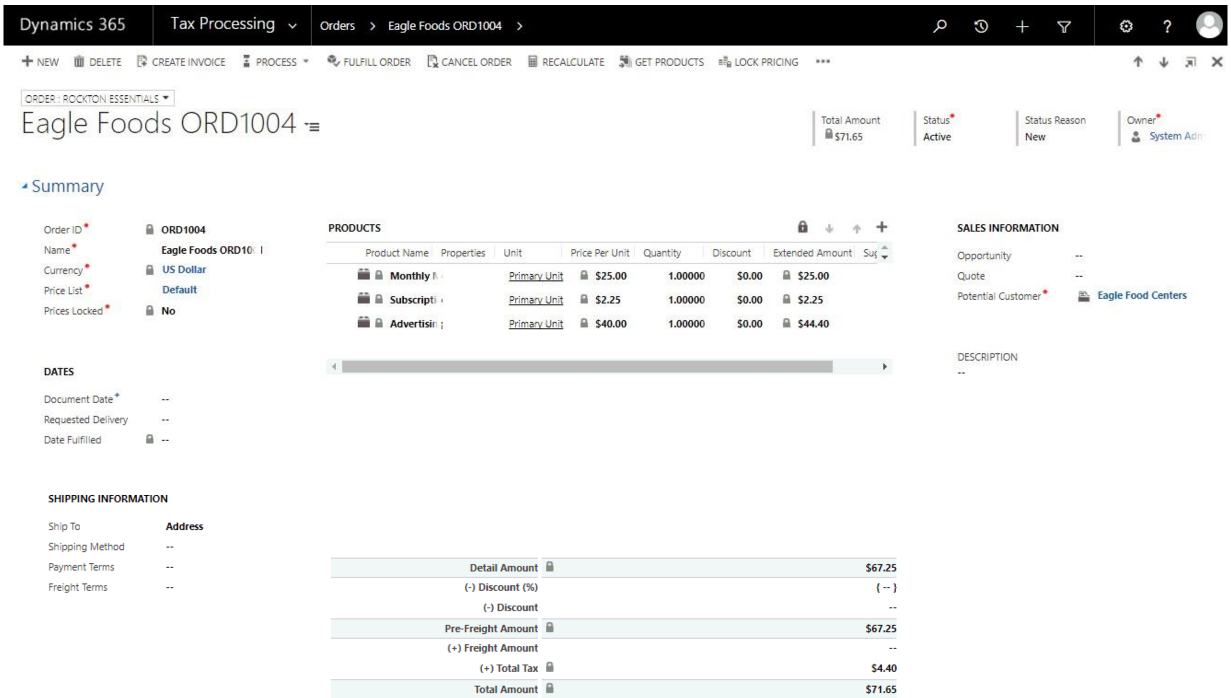
Schedule.

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

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.

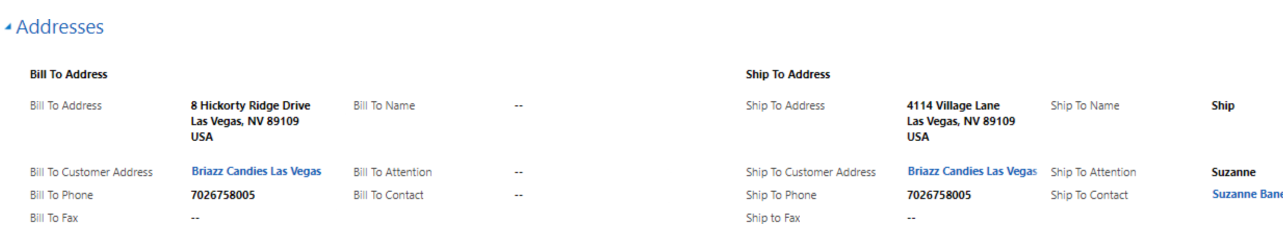


Note: To see this section, use the Order: Inogic Essential form as your default.

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.



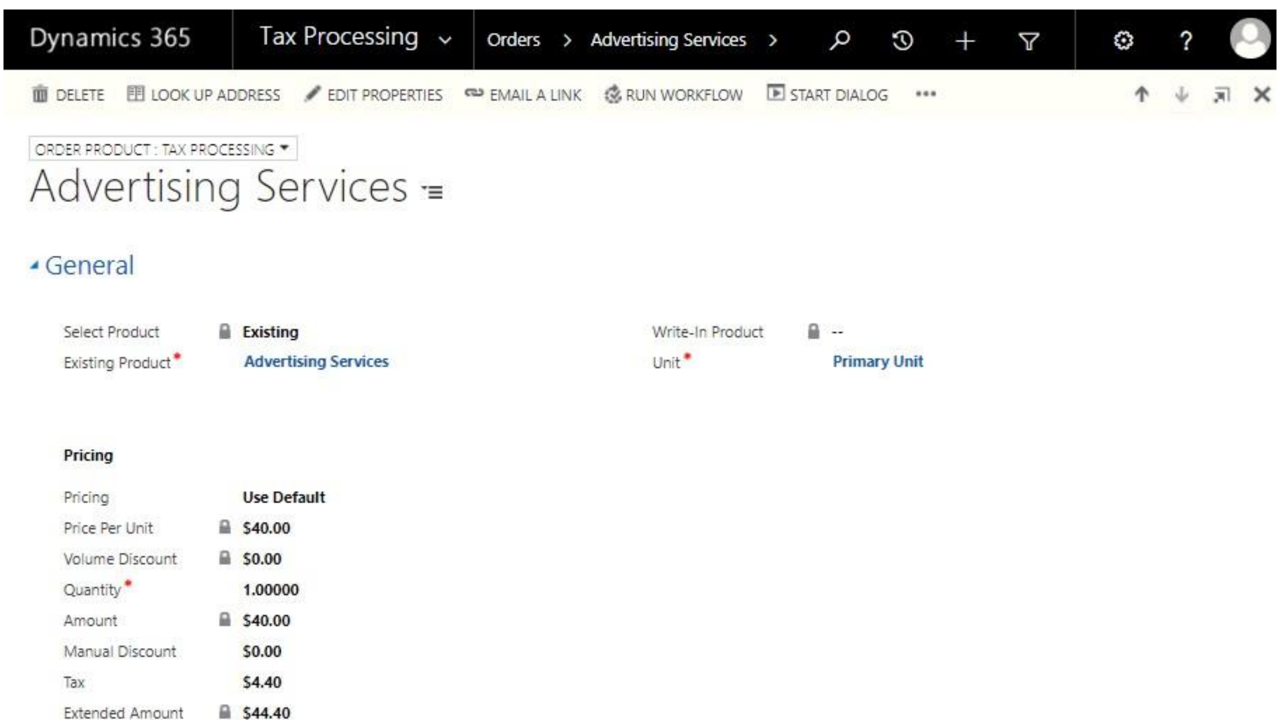
Order Product

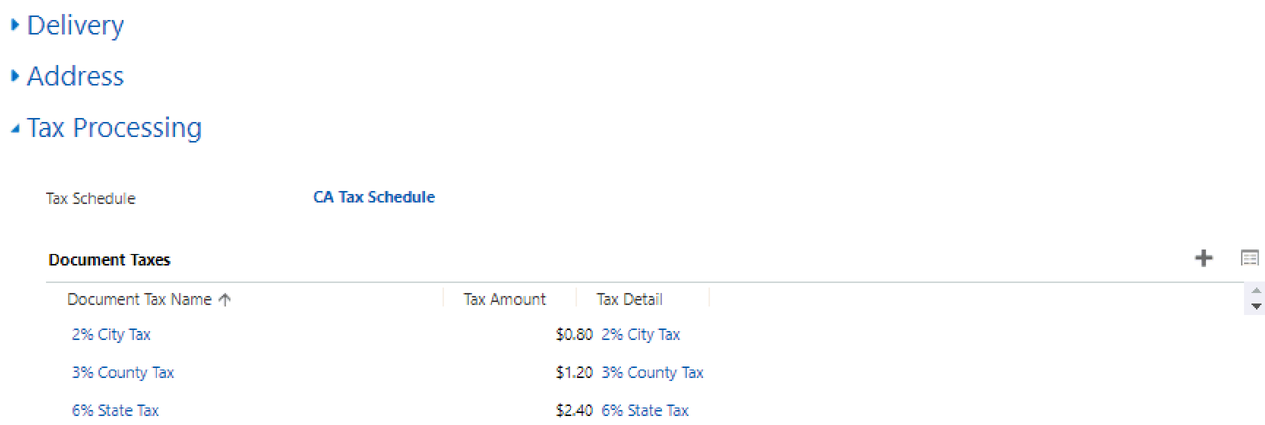
Description

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.





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.

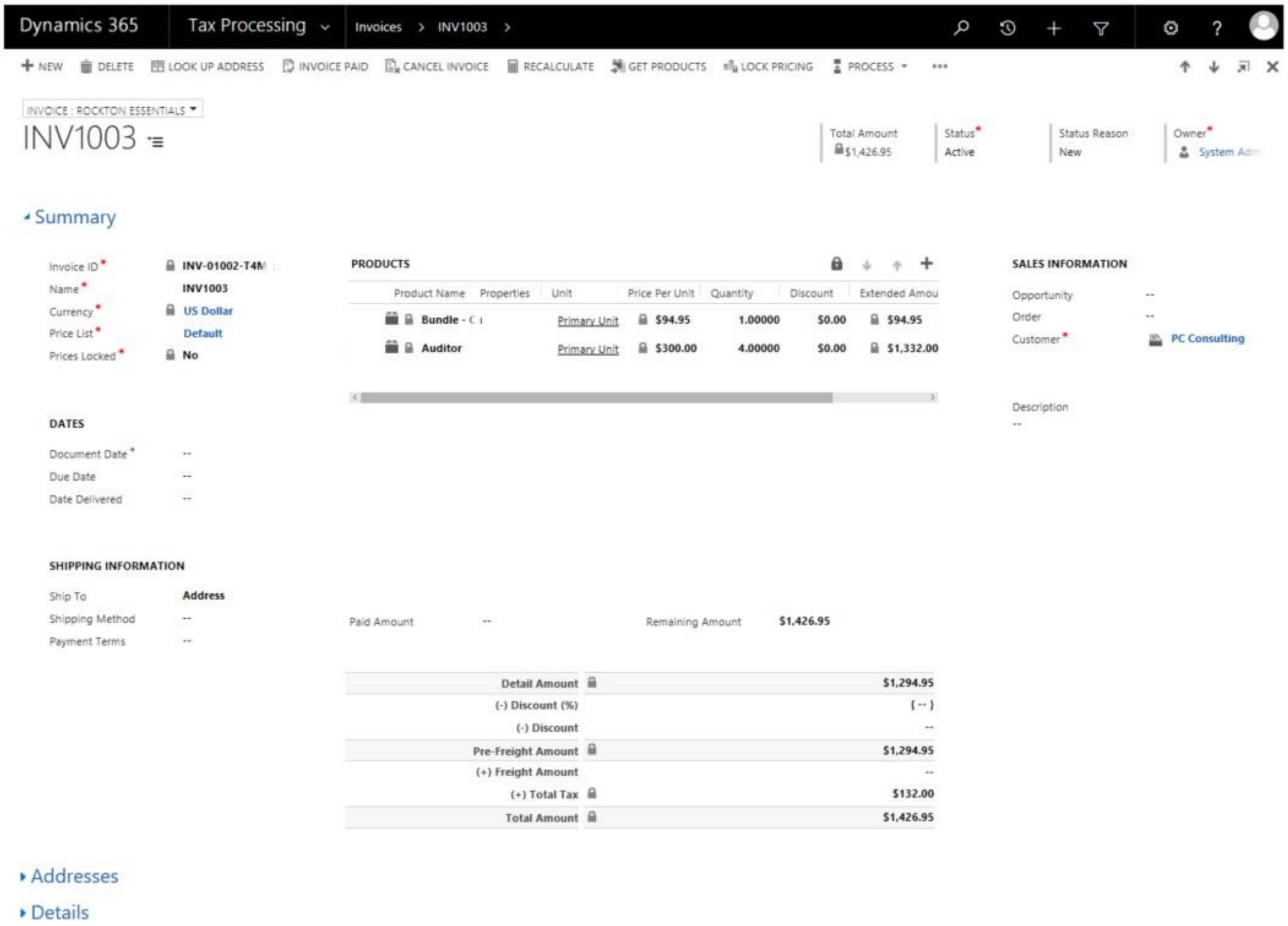
Auto Tax Calculator

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.

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.



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	**8 Hickorty Ridge Drive** **Las Vegas, NV 89109** **USA**	Bill To Name	--
Bill To Customer Address	**Briazz Candies Las Vegas**	Bill To Attention	--
Bill To Phone	**7026758005**	Bill To Contact	--
Bill To Fax	--		

Ship To Address

Ship To Address	**4114 Village Lane** **Las Vegas, NV 89109** **USA**	Ship To Name	**Ship**
Ship To Customer Address	**Briazz Candies Las Vegas**	Ship To Attention	**Suzanne**
Ship To Phone	**7026758005**	Ship To Contact	**Suzanne Bane**
Ship to Fax	--		

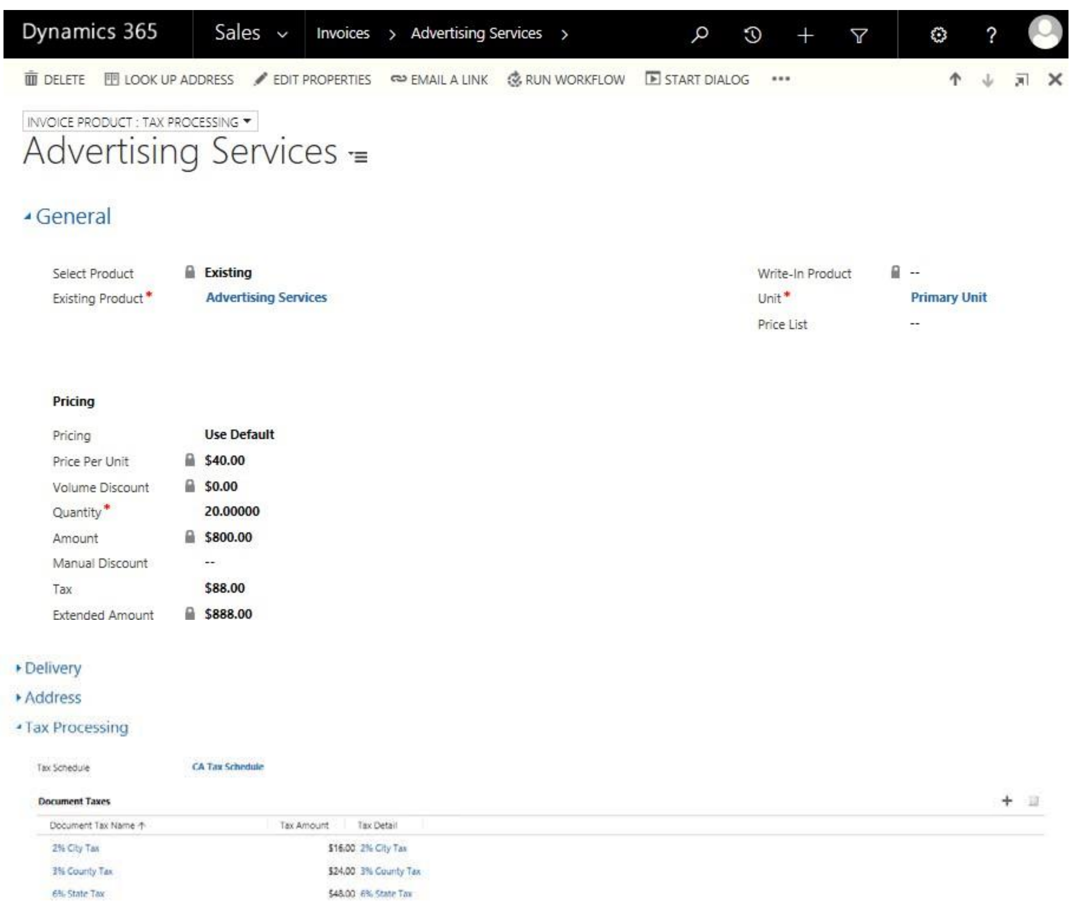
Invoice Product

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.



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**

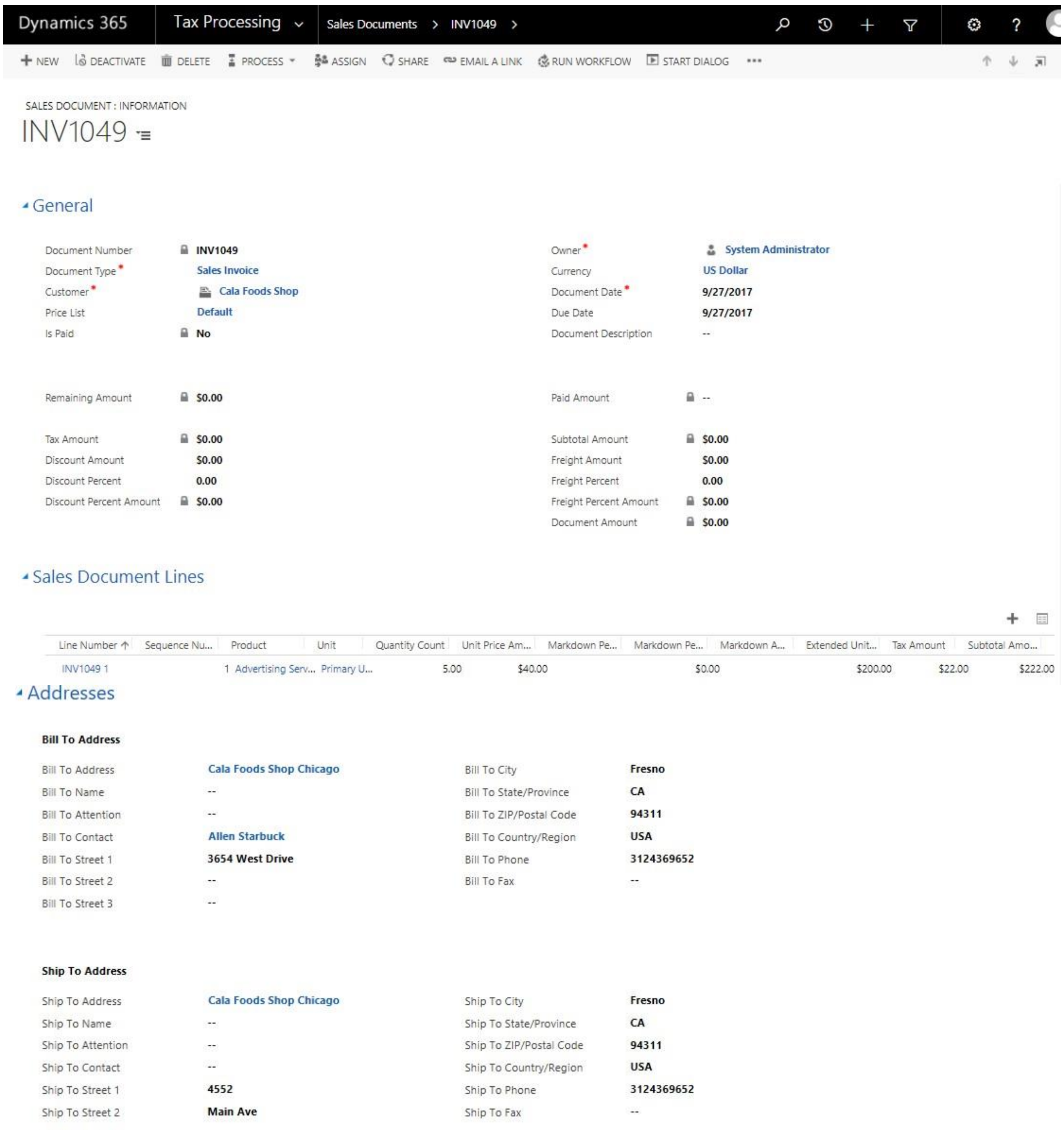
Document Taxes

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.



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:

Doc Amount = Subtotal - (subtotal * Markdown percent/100) + (Subtotal * Freight Percent/100) - Markdown Amount + Freight Amount + 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 Document Lines.

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	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	--		

Sales Document Line

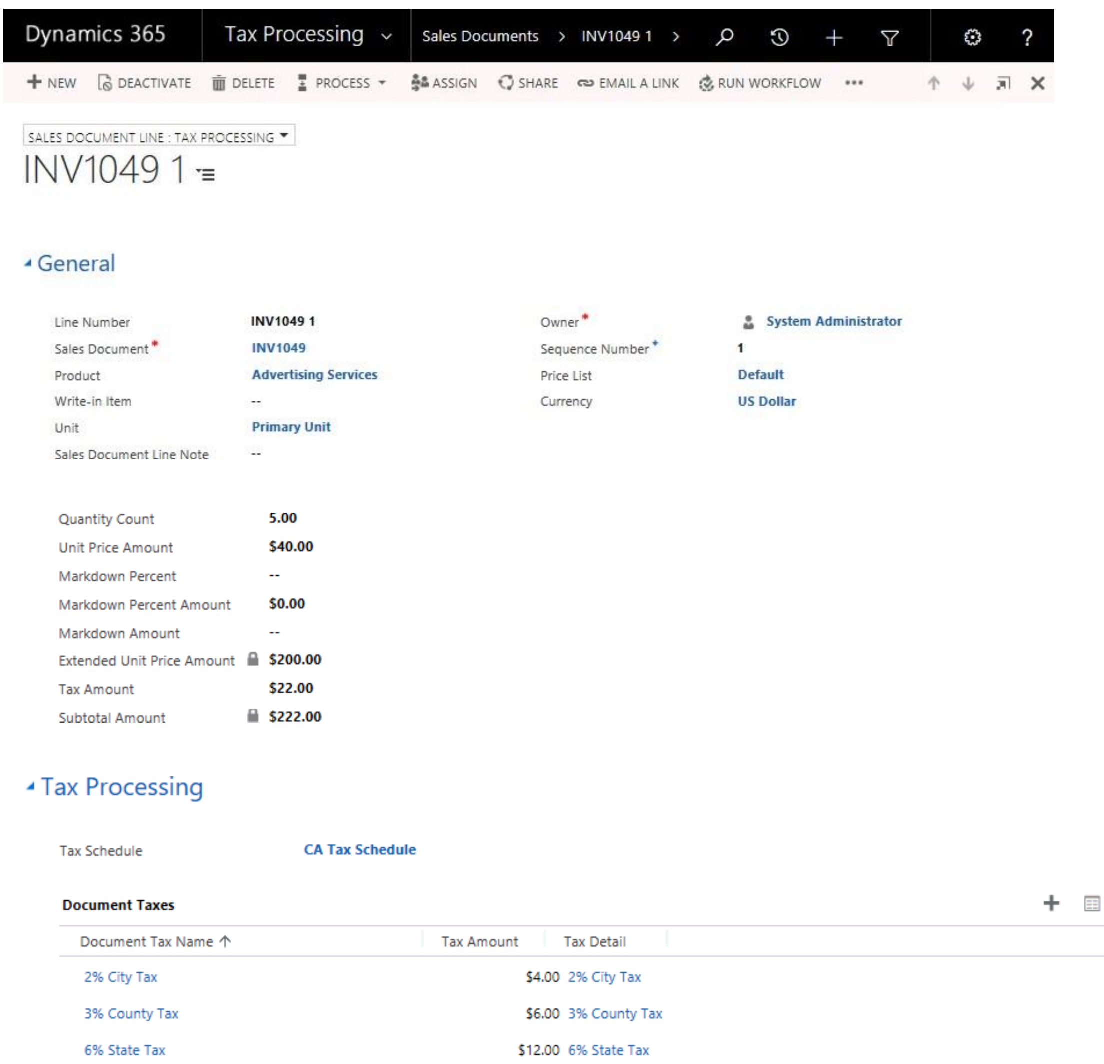
Description

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.



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

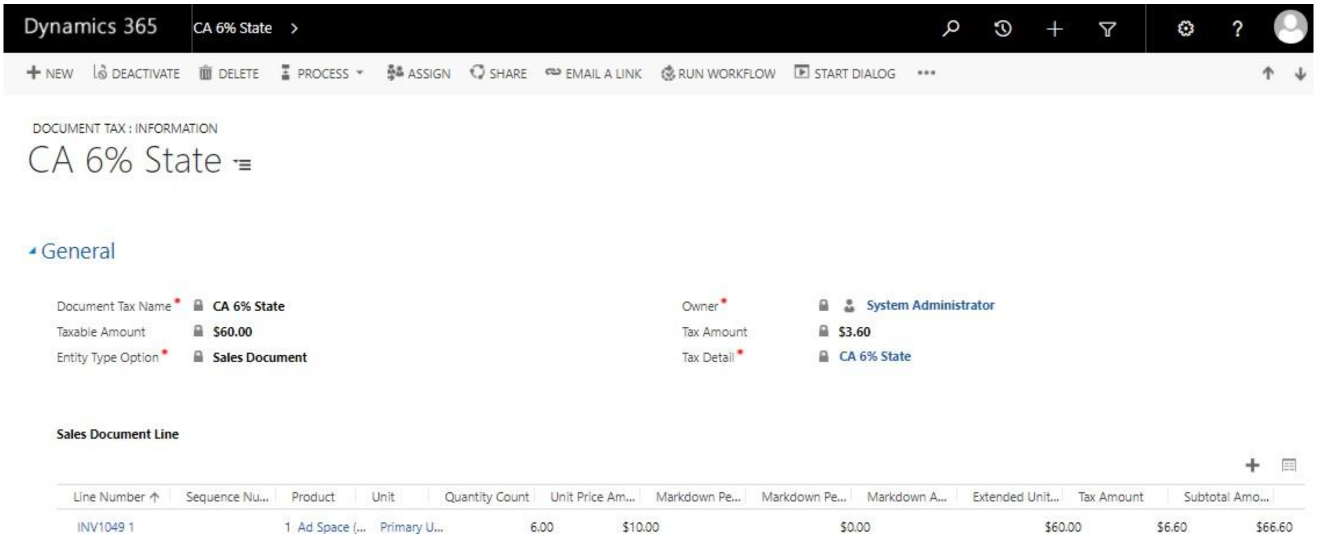
changed, those should be changed on the [Tax Schedule](#).

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.



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 Nu...	Product	Unit	Quantity Count	Unit Price Am...	Markdown Pe...	Markdown Pe...	Markdown A...	Extended Unit...	Tax Amount	Subtotal Amo...
INV1049 1	1	Ad Space (Week...	Primary Unit	6.00	$10.00		$0.00		$60.00	$6.60	$66.60

AvaTax

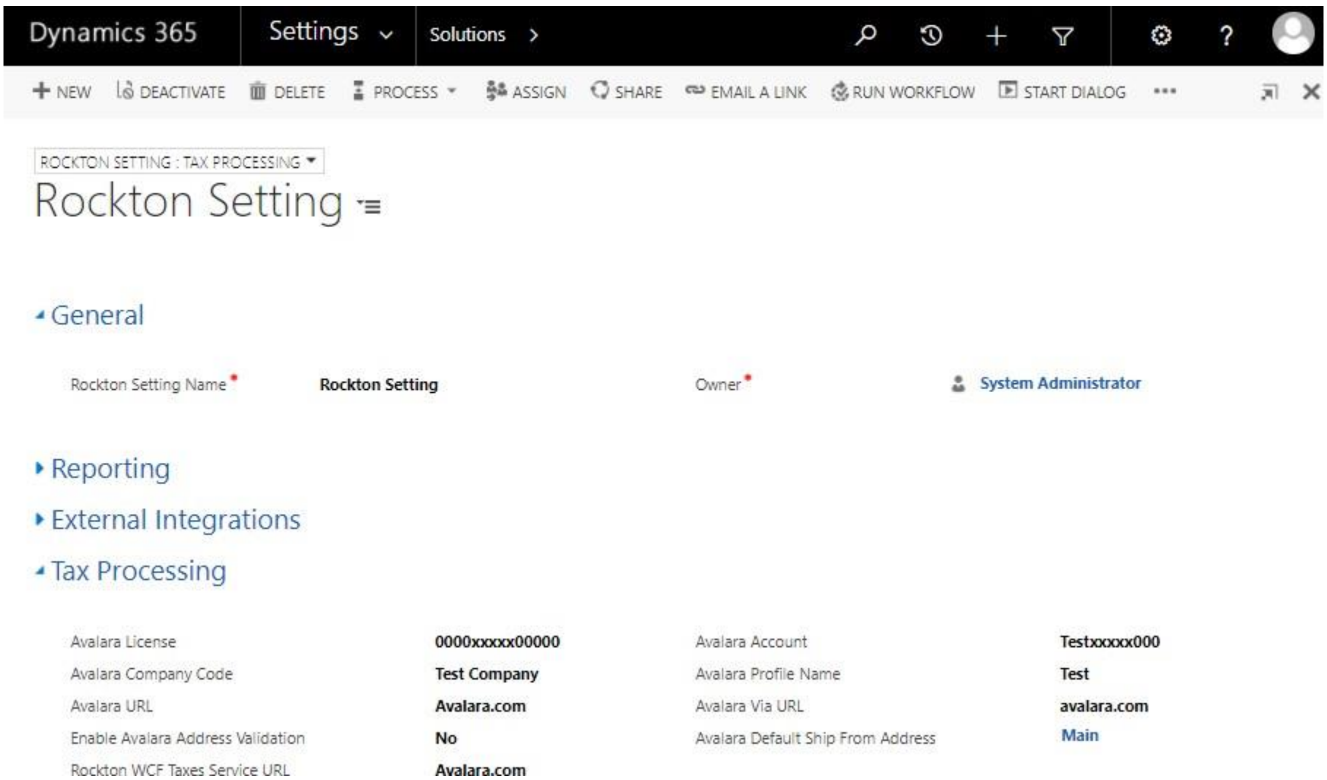
Description

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.

Inogic Settings

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



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.

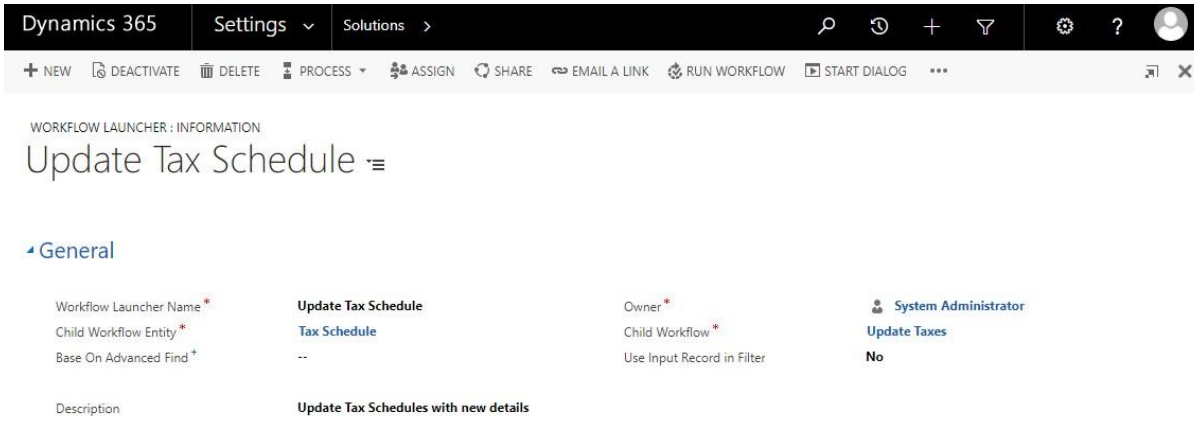
- Opportunity
- Opportunity Product
- Quote
- Quote Product
- Order
- Order Product
- Invoice
- Invoice Product
- Sales Document
- Sales Document Line

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.



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.

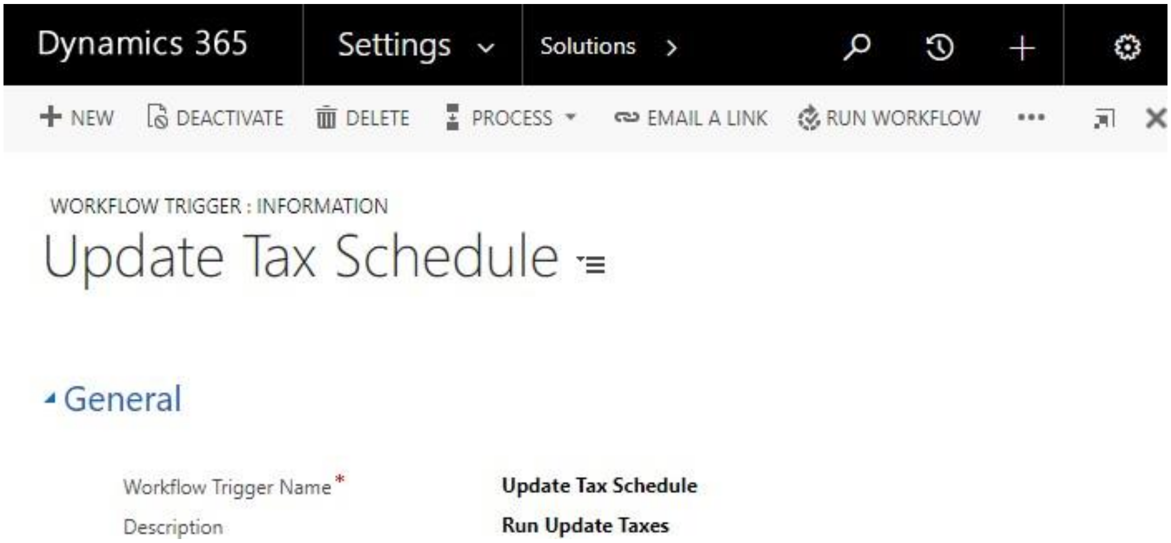
Use Input Record in Filter
Option to use the Input Entity Record as an additional filter in the Advanced Find Query, setting it equal to the Output Entity Filter Attribute.

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

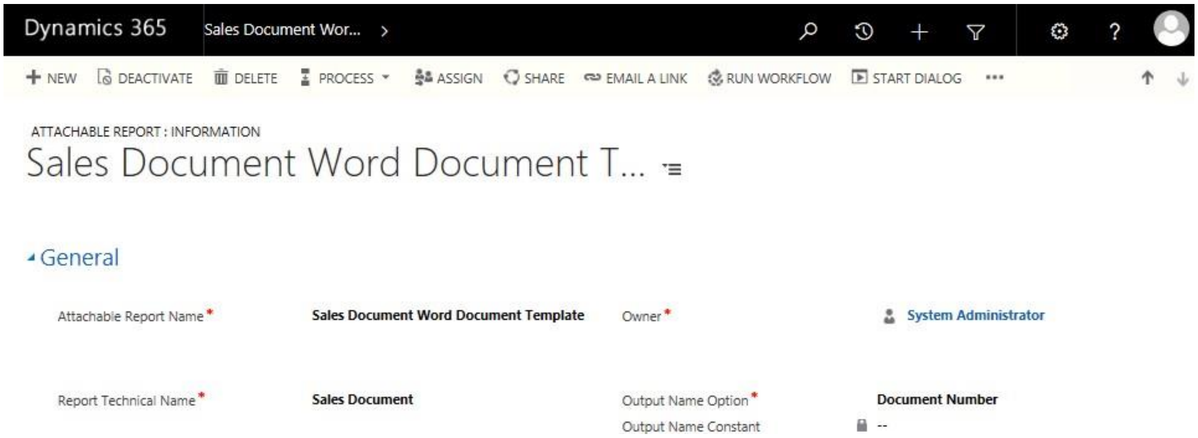
Reporting

- 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.



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.