



Auto Tax Calculator



White Paper

Auto Tax Calculator - White Paper

Aim:

Auto Tax Calculator has been developed to automate the process of tax calculation in the CRM which will increase accuracy and save time. With this app, create customizable tax calculation by creating tax details information and grouping those details in tax schedules manually or else automate it with the help of AvaTax from Avalara for more complex tax calculations. It automatically calculates taxes whenever a new line item for opportunity/quote/order/invoice is added.

Features:

- Create specific Tax Schedules and Tax Details to calculate taxes
- Calculate tax for OOB Opportunity, Quote, Order, Invoice or custom Sales Document to meet your specific need
- Eliminate maintenance of Tax Schedules and Tax details by integrating with AvaTax from Avalara
- Tax calculations based on geolocation using AvaTax

Supported Versions

Versions: Microsoft Dynamics 365 v8.2 and above, Power Apps.

Deployment Models: On-Premises & Online.

Who needs it?

It is primarily designed for organizations that want to eliminate the manual and error prone way of tax calculation and rely on something more robust and automated. Users dealing with complex tax structures can leverage the functionality of AvaTax from Avalara where tax calculations can be automated and applied seamlessly.

Document Type

Create custom Document Type as per Business needs

DOCUMENT TYPE : TAX PROCESSING

Standard Invoice

General

Document Type Name *	Standard Invoice	Owner *	Jack Ryan
Description *	Standard Invoice	Is Entity Default *	No

Numbering

Allow Document Number Entry *	No	Last Document Number *	STDINV0002
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Tax Schedule

Create specific Tax Schedules to calculate taxes

TAX SCHEDULE : INFORMATION

AZ 12%

General

Tax Schedule Name *	AZ 12%	Owner *	Jack Ryan
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Tax Detail Name ↑	Created On
2% County Tax	4/10/2020 6:43 P...
4% City Tax	4/10/2020 6:43 P...
6% State Tax	4/10/2020 6:44 P...

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Tax Detail

Create specific Tax Details to calculate taxes

TAX DETAIL : INFORMATION
2% County Tax

General

Tax Detail Name *	2% County Tax	Owner *	Jack Ryan
Tax Number	8922-9TX	Tax Based On Option	Percent
Tax Percent *	2.00000		

INVOICE PRODUCT : TAX PROCESSING
Advertising Services

Pricing

Pricing	Use Default
Price Per Unit	\$150.00
Volume Discount	\$0
Quantity *	1.00000
Amount	\$150
Manual Discount	\$0
Tax	\$18
Extended Amount	\$168

Tax Processing

Sales Tax Option	Taxable
Tax Schedule	AZ 12%

Document Taxes

Document Tax Name ↑	Tax Amount	Tax Detail
INV-01000-G1L6G8 2% County Tax	\$3	2% County T...
INV-01000-G1L6G8 4% City Tax	\$6	4% City Tax
INV-01000-G1L6G8 6% State Tax	\$9	6% State Tax

Product

Define whether the product is Taxable or not

PRODUCT : TAX PROCESSING
Product: Advertising Services

TAX PROCESSING

Default Sales Tax Option	Taxable	Default Tax Code	
Sales Tax Schedule	AZ 12%		

Avalara AvaTax Integration

Eliminate maintenance of Tax Schedules and Tax details by integrating with AvaTax from Avalara

ROCKTON SETTING : TAX PROCESSING
Rockton Setting

Tax Processing

Avalara

Default Sales Tax Option for Write-Ins *	Taxable	Default Sales Tax Option for Products *	Taxable
Default Tax Code for Write-Ins *	PA2010100	Default Tax Code for Products *	PA2010200
Default Avalara Company Code *			
Avalara License	0000xxxx00000	Avalara Account *	Testxxxx00000
Avalara URL *	avalara.com	Avalara Profile Name *	Test
Enable Avalara Address Validation *	No	Avalara Via URL *	avalara.com
Avalara Commit On Post *	Yes	Avalara Default Ship From Address *	Main Address

Tax Calculations

Calculate tax for sales invoices automatically

Contact Us

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