

Avalara Connector for Aptean Intuitive ERP by PeopleSense

Avalara AvaTax automatically calculates sales and use tax for transactions, invoices, and other activity powered by Aptean Intuitive ERP with a pre-built integration developed by PeopleSense. It's powerful stuff. You're going to save a lot of time.

Base Sales Tax Calculation Functionality

- **All orders are marked taxable, including freight.**
- **All Invoices are sent through Avalara, even when the orders taxability has been overridden.** – For audit purpose, Avalara should have matching transactions with what is in Intuitive, even if the tax amount is 0.
- **Captures Sales Tax on the Quote Card** – Does not create Avalara transaction.
- **Captures Sales Tax on the Sales Order Card** – Does not create Avalara transaction.
- **Captures Sales Tax on the Proforma Invoice** – Does not create Avalara transaction.
- **Captures Sales Tax on the Credit Memo Card** – Credit Memo information sent to Avalara resulting in a committed transaction.
- **Captures Sales Tax on the Misc A/R Invoice Card** – Invoice information sent to Avalara resulting in a committed transaction.
- **Captures Sales Tax during the Invoicing Process** – Invoice information sent to Avalara resulting in a committed transaction.
- **Reversing Credit Memo's and/or Invoices will result in a Voided transaction in Avalara.**
- **Freight is calculated as a separate value.** – Meaning, if estimated shipping amounts have been entered at the delivery level, all of those amounts will be summed and sent to Avalara as one line.

Base Exemption Functionality

Exemptions can be set at the Customer or Item level. If Customers have an exemption certificate on file in Avalara, the tax calculation will be adjusted accordingly. If Items have been setup with Tax Code for special tax calculations, those code are sent to Avalara so the calculation is done correctly.

- **Exemptions setup within Avalara**
 - Avalara will calculate or skip tax calculation based on exemption settings.
- **GL Accounts**
 - Avalara tax codes can be assigned to GL Accounts used for Misc Sales Order lines.
 - Tax Code is passed to Avalara to be used to determine the correct tax calculation.
- **Product Family**
 - Avalara tax codes can be assigned to product families.
 - Tax Code is passed to Avalara to be used to determine the correct tax calculation.
- **Item**
 - Avalara tax codes can be assigned to individual items.
 - When creating a new Item, the tax code will default to the same value set at the Product Family level if there is one.
 - The defaulted value can then be changed to another tax code value or cleared.
 - Tax Code is passed to Avalara to be used to determine the correct tax calculation.

Base Override Functionality

Even though all new Quotes, Sales Orders, Credit Memo's and Misc Invoices are defaulted to be taxable (including freight), those values can be changed. This allows for those times where you do not want to charge tax for a specific reason.

Base Reports Updated

Invoice
Sales Order Acknowledgement
Proforma Invoice

**Request
a DEMO**