

You may be new to returns but not your business.

If you're new to using Managed Returns, here is some support to help you understand the Managed Returns primary features and functionality.

1. **Introduction to Avatax:** Get an overview of each tab in AvaTax and your account's basic setup.

[https://help.avalara.com/Avalara_AvaTax_Update/Set up AvaTax Update](https://help.avalara.com/Avalara_AvaTax_Update/Set_up_AvaTax_Update)

2. **Schedule Returns:** Set up the tax return forms' filing frequency for each state your company files. Your scheduled returns give us the data needed to file on your behalf and show each scheduled filing details.

[https://help.avalara.com/Returns/Schedule returns](https://help.avalara.com/Returns/Schedule_returns)

3. **Manage your return schedule:** The summary of your monthly tax activity and liability by state gives up-to-date financial data for analysis and reconciliation with your business application.

[https://help.avalara.com/Returns/Edit your scheduled returns](https://help.avalara.com/Returns/Edit_your_scheduled_returns)

4. **Manage tax notices:** A tax notice is an advice from a tax jurisdiction informing a tax account holder of a requirement, adjustment, or error concerning their tax account.

https://help.avalara.com/Returns/Understanding_tax_notices

Read More about the process:

[https://help.avalara.com/Returns/You're new to Returns but your business isn't?origin=definition](https://help.avalara.com/Returns/You're_new_to_Returns_but_your_business_isn't?origin=definition)

Install and Configure Sage Sales Tax for Sage 300

Powered by Avalara AvaTax

After you activate AvaTax and set up your company profile, install and configure AvaTax for your business application. During configuration, customize your setup to fit your unique business needs for things like:

- Tax calculation settings for various tax types
- Exemption settings if you have exempt customers
- Product taxability settings

Alter these settings when your business needs change.

If you've previously installed the integration, learn how to upgrade to the latest version.

1. Download the Avatax Integration for Sage 300

If you didn't already, download your integration software to connect your business application to AvaTax.

- In AvaTax, go to **Settings > Integrations > Manage**.
- Depending on your business application, do one of the following:
 - Select **See connector versions**, select the most recent version, and then select **Download**.
 - If you don't see a **Download** button, select **Help and Support** for detailed instructions. You may need to log in to your business application website before you see help documentation.
- If you downloaded a file, in your **Downloads** folder, right-click the .zip file and extract the installation folder or file (.exe or .pdf or .msi).

2. Install the Avatax integration for Sage 300

Before you install:

- Consult with your solution provider to make sure that Sage Sales Tax for Sage 300 Powered by AvaTax won't interfere with any other Sage 300 add-ons
- Make sure all Sage 300 users are logged out and that Sage 300 is closed
- Uninstall any previous versions of Sage Sales Tax for Sage 300 Powered by AvaTax

To install Sage Sales Tax for Sage 300 Powered by AvaTax:

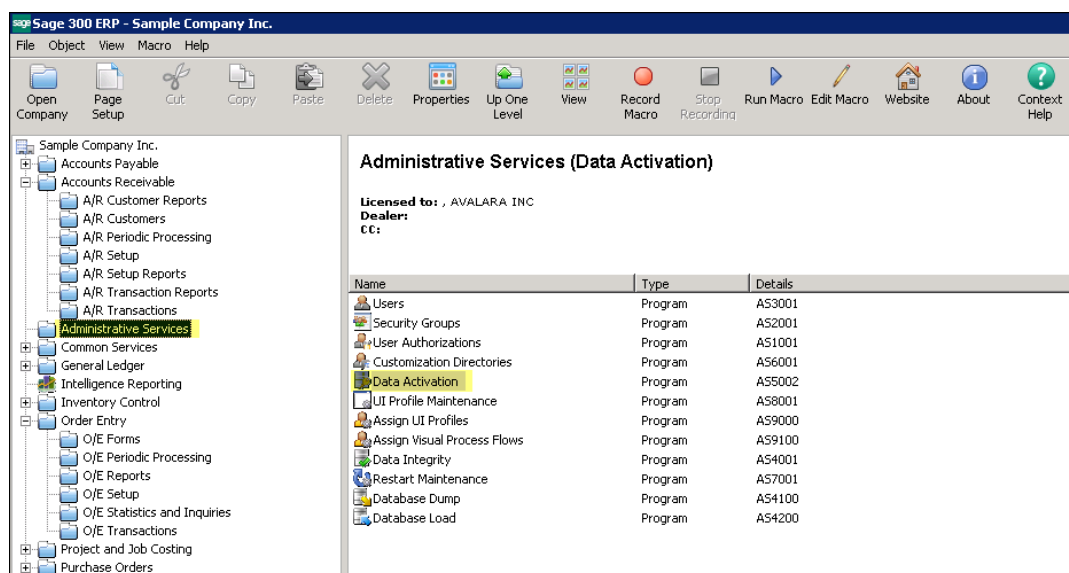
- Right-click the .exe file that you downloaded from AvaTax, click the **Compatibility** tab, and do the following:
 - Under **Compatibility mode**, click **Run this program in compatibility mode for**, and, on the menu under that, select your Windows operating system.
 - Under **Privilege level**, click **Run this program as an administrator**, and then click **OK**.
- Double-click the .exe file.
- In the **Destination Folder** dialog box, choose the default installation and application folders or other folders on your computer instead of on a network, and then click **Next**.
- In the **AvaTax is installing** dialog box, click **Next**.
- In the **Installation succeeded!** dialog box, click **Finish**.

Configure Sage Sales tax for Sage 300 powered by Avatax to fit your company's needs.

3. Activate data

To activate data for Sage Sales Tax for Sage 300 Powered by AvaTax:

- In Sage 300 ERP, click **Administrative Services**, and then click **Data Activation**. The **SAMINC - Data Activation** dialog box opens.



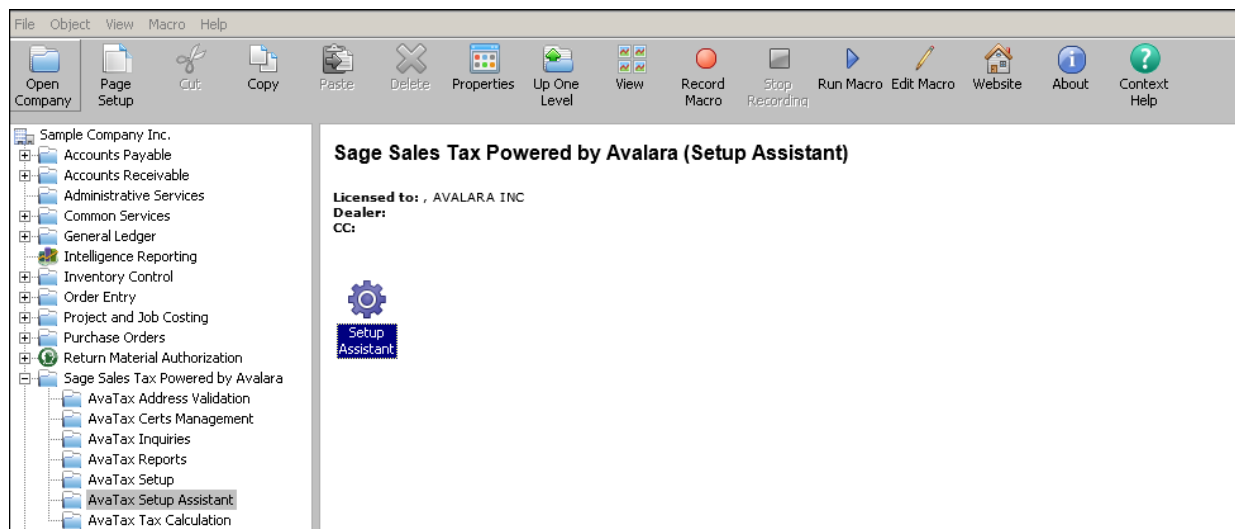
- Under **Applications for Activation**, click **Sage Sales Tax Powered by Avalara**, and then click **Proceed**.
- At the bottom, click **Activate**.
- Click **Close**.

4. Configure Avatax with the Setup Assistant

The AvaTax Setup Assistant guides you through the most essential configuration settings required to calculate tax.

To configure Sage Sales Tax for Sage 300 Powered by AvaTax with the Setup Assistant:

- Log in to your Sage 300 account.
- Go to **Sage Sales Tax Powered by Avalara > AvaTax Setup Assistant**, and then click **Setup Assistant**.



- In the **Avalara Setup Assistant** dialog box, next to **Enter your Account Credentials and Company Code**, click the > button, fill in the following, and then click **OK**:

Field	Action
Account Number License Key	View your account number in AvaTax. Select Settings > All AvaTax settings. The account number is listed at the top of the page as your Account ID. If you don't know your license key, get a new one .
Username Password	Enter the user name and password you use to log in to AvaTax.
Web Service URL	Select the type of account you're connecting to in AvaTax. Click Test Connection , and then follow one of these steps: If you see the message "Configuration validated successfully," click OK and move to the next field. If you see the message "Connection Test failed," reenter your account information, and then click Test Connection again.
Company Code, Company Name	Select the company code that you created when you activated your AvaTax account.

- In the **Avalara Setup Assistant** dialog box, next to **Set Tax Liability Account**, click the > button, and then:
 - In the **Map Tax Group** dialog box, select the **Tax Group Code** as **AvaTax**.
 - To launch the **Customer Tax Group Update Utility**, click **Launch**. The AvaTax Customer Tax Group Update Utility makes it easy to assign some or all of your customers to AvaTax so that Sage 300 uses AvaTax as the sales-tax provider when you process transactions for those customers.
 - In the **Finder - Tax Groups** window, under **Tax Group**, select **AvaTax**, and then click **Select**.
 - Fill in the following, click **Update**, and then click **Close**:

Field	Action
Record Type	Select either Customer , Customer Group , or Tax Group . The Filter Criteria changes based on your selection.
Country	Select the appropriate country.
State	Select a range of states in which to apply AvaTax as the sales-tax provider to all the customers whom you select.
Update all Ship-To records associated with customer	Select if you want to assign the selected tax group to all the ship-to addresses of the customers.
From Customer Number To Customer Number	Fill in both to define the range of customers.

- In the **Avalara Setup Assistant** dialog box, next to **Enable Address Validation for USA and Canada**, click the > button.
- In the **Address Validation** dialog box, do the following, and then click **Ok**:
 - **Optional**: If you disable address validation, AvaTax uses the customer's ship-to address as entered to calculate the correct sales tax. Sales tax might be calculated incorrectly if this option is disabled.
 - In the **Country Selection** section, select the country for which you want to enable address validation and click >>.
- In the **Avalara Setup Assistant** dialog box, next to **Test Calculating Tax**, click the > button, and then follow one of these steps:
 - If you see the message "Congratulations! You are connected to AvaTax," go to the next step.
 - If you see any other message, follow steps 1-6 again.
- To set up your tax profile using the AvaTax tax profile assistant, in the **Avalara Setup Assistant** dialog box, click **Click here to launch the AvaTax Tax Profile Assistant**.

5. Configure Avatax for your accounting software

- Go to **Sage Sales Tax Powered by Avalara > AvaTax Setup**, and then click **AvaTax Options**. The **AvaTax Options** dialog box opens.
- On the **Security** tab, fill in the following, and then click **Test Connection**:

Field	Action
URL	Enter https://development.avalara.net if you have an AvaTax development account or https://avatax.avalara.net if you have an AvaTax production account.
Account Value End User License Key	View your account number in AvaTax. Select Settings > All AvaTax settings. The account number is listed at the top of the page as your Account ID. If you don't know your license key, get a new one .
Company Code	Enter your AvaTax company code

- Complete or modify fields on the remaining tabs, using the following information, and then click **Close** to save your changes:
 - Optional:** The **General** tab:

Field	Description
Tax Code Mapping	<p>Select to enable mapping items to Avalara tax codes to account for varying taxability of products and services. Item tax code mapping takes precedence over item tax class mapping.</p> <p>Item Category - To use this option, ensure that the Order Entry module is active.</p> <p>Commodity Number - If the Accounts Receivable module is active, the A/R items window opens. If the Order Entry module is active, the I/C items window opens.</p>

Field	Description
	AvaTax Table - To use this option, ensure that the Order Entry module is active.
Enable Entity/Use Code	<p>Enable to map entity/use codes for your customer addresses to flag them as exempt from sales tax.</p> <p>Header Level Entity/Use Code - Exemption reasons that are linked to a customer to create an exemption when that customer and address combination is used in a transaction.</p> <p>Line Level Entity/Use Code - Exemption reasons that are attached at the line level in a transaction.</p>
Send Item Account to AvaTax	When selected, the general ledger account associated with the item is sent along with the item code when used in a transaction.
Enable UPC Code	Select to send a UPC instead of an item code to AvaTax. Using this feature may trigger additional fees. Talk to your Customer Account Manager (CAM) for more information.
Disable Warning Messages	Select this option to disable AvaTax warning messages in Sage 300.
Default Freight Tax Code	<p>To use this option, ensure the Order Entry module is active.</p> <p>Click the search icon to open a list of available freight codes.</p> <p>The freight code you select in this field applies to any codes mapped under OE/IC Options. The entry under Freight Code for Avatax carries the value that's in the Default Freight Tax Code field. If there are no values under Freight Code for Avatax, the Default Freight Tax Code won't be used in transactions sent to AvaTax.</p>
Ship-Via Code (POS)	To use this option, ensure the Order Entry module is active. If the Order Entry module is not active, this field is a free text field to map Ship-Via Code for accounts receivable transactions.

Field	Description
	AVPICK , the AvaTax default, creates a point-of-sale (origin-based sourcing) transaction when used in the ship-via field on a transaction sent to AvaTax. Populating this field with any ship-via code creates a point-of-sale transaction. We suggest you use the AVPICK default on transactions that require point-of-sale sourcing.
Request Timeout (in Seconds)	We recommend that you don't adjust this setting. Enter the length of time to wait for AvaTax to respond to calculation requests.
Enable Log	This function is primarily used for troubleshooting issues. If you choose to enable logging, all success, warning, and error messages are included in the log. Only enable logging if you've been instructed to do so by Avalara Support because it can significantly slow down your service.

- The **Tax Calculation** tab:

To use this feature, ensure that the General Ledger module and either the Accounts Payable module or the Purchase Orders module is active.

Section	Field and Description
Optional: General Options	<p>Disable Tax Calculation - If you choose to disable tax calculation, your accounting software no longer uses AvaTax to calculate tax on transactions.</p> <p>Use Posting Date to Post Transactions - Select to use the date an invoice was posted instead of the document date.</p> <p>Tax Only Adjustment - Select to allow tax adjustments on credit memos.</p> <p>Always check addresses before calculating - Select to validate addresses before AvaTax calculates sales tax. We recommend that you don't select this because it may lead to extra charges.</p> <p>Resume Tax Calculation on Address Validation Failure - Select to let AvaTax calculate tax for a transaction even if it can't validate the address for it.</p>
Default Tax Group	Tax Group Code - Select a tax group code with AVATAX in it to calculate sales tax with AvaTax.

Section	Field and Description
	<p>Tax Liability Account - The account associated with the tax group.</p> <p>Currency Code - The currency associated with the tax group.</p>
Consumer Use Tax Assessment	<p>Optional: Enable Use Tax Assessment - If enabled, your accounting software uses AvaTax to calculate consumer use tax on vendor consumer use tax transactions.</p> <p>Credit Account No. - Select the account to which you want to credit your vendor use liabilities.</p> <p>Debit Account Option - Select the account from which the accrual amount is debited.</p> <p>Debit Account No. - Select the associated account specified when you select Single Account in Debit Account Option.</p>

- **Optional:** The **Address Validation** tab:

Section	Field and Description
General Options	<p>Disable Address Validation - If you disable address validation, AvaTax uses the customer's ship-to address as entered to calculate the correct sales tax. Sales tax might be calculated incorrectly if this option is disabled.</p> <p>Return results in Uppercase - Select to save all address validation results in uppercase format.</p>
Batch Processing Options	<p>During Batch Address Validation, continue processing regardless of errors - Select to ignore any errors during batch processing.</p> <p>Scan, Add and Report Validated Addresses during Batch Address Validation:</p> <p>Manually - Select to manually update records that were validated via the report displayed after the batch validation has finished.</p> <p>Automatically - Select to let AvaTax automatically update the records as they're validated; records not validated are displayed via a report after the batch validation has finished.</p>

Section	Field and Description
Country Selection	Select the countries that you'd like to include in address validation using AvaTax.

- **Optional:** The About Avalara tab contains technical information about your connector/integration and your AvaTax account.

For Help, you may access Avalara Help Center: https://help.avalara.com/Returns_Central