



AvaTax

System Integration Document for Avalara AvaTax for Adobe Commerce

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1.0 Connector Overview

The Avalara for Adobe Commerce connector provides rapid integration for Adobe Commerce implementations. The extension is open-sourced package that can easily integrate into any Adobe Commerce instance. This extension can be configured in the Adobe Commerce Administrator and contain all the elements necessary to perform a successful implementation of Avalara AvaTax for **Tax Calculation, Address Validation, Customer exemptions, VAT ID, Product Synchronization with Avalara, and Transactions outside the U.S. services and Avalara E-Invoicing and Live Reporting** for Peppol mandates.

Note:

We've updated the setup process for the connector. Advanced settings such as, Tax calculation, Address validation, Customer exemptions, VAT ID, and Product sync are now managed directly within Avalara, simplifying the integration.

Some tax calculation settings and VAT transport settings can still be managed from Adobe Commerce.

2.0 Configuration

2.1. Configure

To configure the Avalara for Adobe Commerce connector, navigate to **Admin > Stores > AvaTax Configuration > Configure**.

| Sr. No. | Label | Value | Default Value | Description |
|---------|--------------------------|---------------------|---------------|------------------------------------|
| 1. | AvaTax Extension Version | • Extension Version | 3.0.0 | • The extension version of AvaTax. |
| 2. | Account ID | | | • AvaTax account number |
| 3. | License Key | | | • AvaTax license key |

3.0 Advanced Settings

3.1. Tax Calculation

To configure the tax calculation settings for the Avalara for Adobe Commerce connector, navigate to **Admin > Stores > AvaTax Configuration > Configure > Advanced Settings > Tax Calculation**.

| Sr. No. | Label | Value | Default Value | Description |
|---------|-----------------------------------|---|---------------|--|
| 1. | Customer Code Format | <ul style="list-style-type: none"> List of Customer Attributes | ID | <ul style="list-style-type: none"> Select a format for identifying customers in Avalara. If you don't define a value for the selected attribute, the customer or guest ID is used. You cannot change this setting once the integration is live. |
| 2. | UPC Attribute To Use As Item Code | <ul style="list-style-type: none"> List of Product Attributes | No Attribute | <ul style="list-style-type: none"> By default, this selection sends the Adobe Commerce product SKU to the AvaTax ItemCode field. If you want to use a UPC product attribute as the AvaTax ItemCode, select which attribute maps to your UPC attribute. If a UPC attribute is present on a product record, it's used as the AvaTax ItemCode and is prepended to the UPC. Otherwise, the product's SKUs are sent. |

3.2. Transactions outside the US

To configure VAT transport for the Avalara for Adobe Commerce connector, navigate to **Admin > Stores > AvaTax Configuration > Configure > Advanced settings > Transactions outside the US**.

| Sr. No. | Label | Value | Default Value | Description |
|---------|----------------------|--|---------------|--|
| 1. | Submit VAT Transport | <ul style="list-style-type: none"> Shipping Method: List of enabled shipping methods Transport: Possible Transport values received from AvaTax API | Seller | <ul style="list-style-type: none"> Admin can assign separate Transport values for all enabled shipping methods, and this is sent in Tax Calculation request for the selected shipping method on Checkout. |

4.0 E-Invoicing and Live Reporting

4.1. Configure

To configure the Avalara for Adobe Commerce connector for E-Invoicing and Live Reporting, navigate to **Admin > Stores > AvaTax Configuration > Configure > E-Invoicing and Live Reporting**.

| Sr. No. | Label | Value | Description |
|---------|--------------------|--------------|--|
| 1. | Client ID | | • ELR Client id |
| 2. | Client Secret | | • ELR secret |
| 3. | Company Name | Company list | • AvaTax license key |
| 4. | Company Attributes | | <ul style="list-style-type: none"> • Set the following default fields: <ul style="list-style-type: none"> ○ PeppolID ○ RegistrationName ○ SellerCompanyId |

The **Manage Mapper** link redirects users to set up mapper where some of the default values are set up as follows:

| Sr. No. | Default Table Name | Default Selected Value | Document Type (Tables used for) | Description |
|---------|--------------------|--|------------------------------------|--|
| 1. | sales_invoice | <ul style="list-style-type: none"> • entity_id • store_id • base_grand_total • shipping_tax_amount • tax_amount • base_tax_amount • grand_total • shipping_amount • subtotal • discount_amount • order_id • order_currency_code • increment_id • created_at • shipping_incl_tax • customer_balance_amount • base_gift_cards_amount • gift_cards_amount | Invoice | Default sales invoice fields to be sent in the ELR schema. |

| Sr. No. | Default Table Name | Default Selected Value | Document Type (Tables used for) | Description |
|---------|---------------------|--|---------------------------------|---|
| | | <ul style="list-style-type: none"> • gw_base_price • gw_price • gw_tax_amount • reward_currency_amount | | |
| 2. | sales_order | <ul style="list-style-type: none"> • entity_id • customer_id • increment_id • customer_firstname • customer_lastname • order_currency_code • created_at • updated_at • customer_balance_amount • gw_price • gw_price_incl_tax • gw_items_price • gw_items_price_incl_tax • gw_items_tax_amount | Invoice / creditmemo | Default sales order fields to be sent in the ELR schema. |
| 3. | sales_invoice_item | <ul style="list-style-type: none"> • entity_id • discount_amount • qty • name • row_total • tax_amount • base_price • price • row_total_incl_tax • base_row_total | Invoice | <ul style="list-style-type: none"> • Default sales invoice items fields to be sent in ELR schema |
| 4. | sales_order_address | <ul style="list-style-type: none"> • entity_id • parent_id • country_id • street • city • postcode • firstname • lastname • telephone | Invoice / creditmemo | <ul style="list-style-type: none"> • Default sales order address fields to be sent in ELR schema |

| Sr. No. | Default Table Name | Default Selected Value | Document Type (Tables used for) | Description |
|---------|-----------------------|---|---------------------------------|--|
| | | <ul style="list-style-type: none"> email address_type | | |
| 5. | customer (EAV) | <ul style="list-style-type: none"> customerpeppolid partyidentificationid customercompanyid | Invoice / creditmemo | <ul style="list-style-type: none"> Default customer fields to be sent in ELR schema |
| 6. | sales_creditmemo | <ul style="list-style-type: none"> entity_id adjustment_positive base_shipping_tax_amount grand_total shipping_amount adjustment_negative discount_amount subtotal shipping_tax_amount tax_amount order_id order_currency_code increment_id created_at shipping_incl_tax customer_balance_amount base_gift_cards_amount gift_cards_amount gw_base_price gw_price gw_tax_amount reward_currency_amount | creditmemo | <ul style="list-style-type: none"> Default sales credit memo fields to be sent in the ELR schema. |
| 7. | sales_creditmemo_item | <ul style="list-style-type: none"> entity_id base_price tax_amount base_row_total discount_amount row_total qty price row_total_incl_tax name | creditmemo | <ul style="list-style-type: none"> Default sales credit fields to be sent in the ELR schema. |

Condition Payload

| Sr. No. | Default Table Name | Default Selected Value | Document Type (Tables used for) | Description |
|---------|--------------------|------------------------|---|------------------------|
| 1. | destinationCountry | • sales_order_address | country_id | • Invoice / creditmemo |
| 2. | entityType | • sales_creditmemo | Invoice / creditmemo | • Invoice / creditmemo |
| 3. | buyerTaxID | • customer_entity | taxvat | • Invoice / creditmemo |
| 4. | originCountry | • core_config_data | shipping/origin/country_id | • Invoice / creditmemo |
| 5. | sellerTaxID | • core_config_data | general/store_information/ merchant_vat_number | • Invoice / creditmemo |

5.0 List of Integration Points

The following table informs you about the list of integration points given on the Adobe Commerce integration pages:

| Sr. No. | Platform Functionality | Address Validation | Tax Calculation | Tax Certificate | Cross Border | ELR |
|---------|---|--------------------|-----------------|-----------------|--------------|-----|
| 1. | Adobe Commerce Admin - Customer Add/Update Address | Yes | No | No | No | No |
| 2. | Adobe Commerce Admin - Customer Add/Invalidate Tax Certificate | No | No | Yes | No | No |
| 3. | Adobe Commerce Admin – View/Add/Delete Customer Tax Classes | No | Yes | No | Yes | No |
| 4. | Adobe Commerce Admin – View/Add/Delete Product Tax Classes | No | Yes | No | No | No |
| 5. | Adobe Commerce Admin – View/Clear Logs | Yes | Yes | No | Yes | No |
| 6. | Adobe Commerce Admin – View/Clear/Process Queue Items | No | Yes | No | No | No |
| 7. | Adobe Commerce Admin – Add/Update Product | No | No | No | Yes | No |
| 8. | Adobe Commerce StoreFront - My Account Address Add/Update Address | Yes | No | No | No | No |
| 9. | Adobe Commerce StoreFront - My Account List/Add/Invalidate Tax Certificates | No | No | Yes | No | No |
| 10. | Adobe Commerce StoreFront Checkout - Shipping | Yes | No | No | No | No |
| 11. | Adobe Commerce StoreFront Checkout - Review & Payments | No | Yes | Yes | Yes | No |
| 12. | Adobe Commerce Admin – Invoice Generation | No | Yes | No | No | Yes |
| 13. | Adobe Commerce Admin - Credit Memo | No | Yes | No | No | Yes |
| 14. | Adobe Commerce Admin - New Order | Yes | Yes | Yes | Yes | No |

6.0 Request Mapping

The following fields/attributes displays the integration points used for the Address Validation:

6.1. Address Validation

| Sr. No. | Adobe Commerce Field | AvaTax Field | Data Type |
|---------|----------------------|--------------|-----------|
| 1. | street | line1 | String |
| 2. | street | line2 | String |
| 3. | street | line3 | String |
| 4. | city | city | String |
| 5. | regionId | region | String |
| 6. | countryId | country | String |
| 7. | postalCode | postalCode | String |

6.2. Tax Calculation

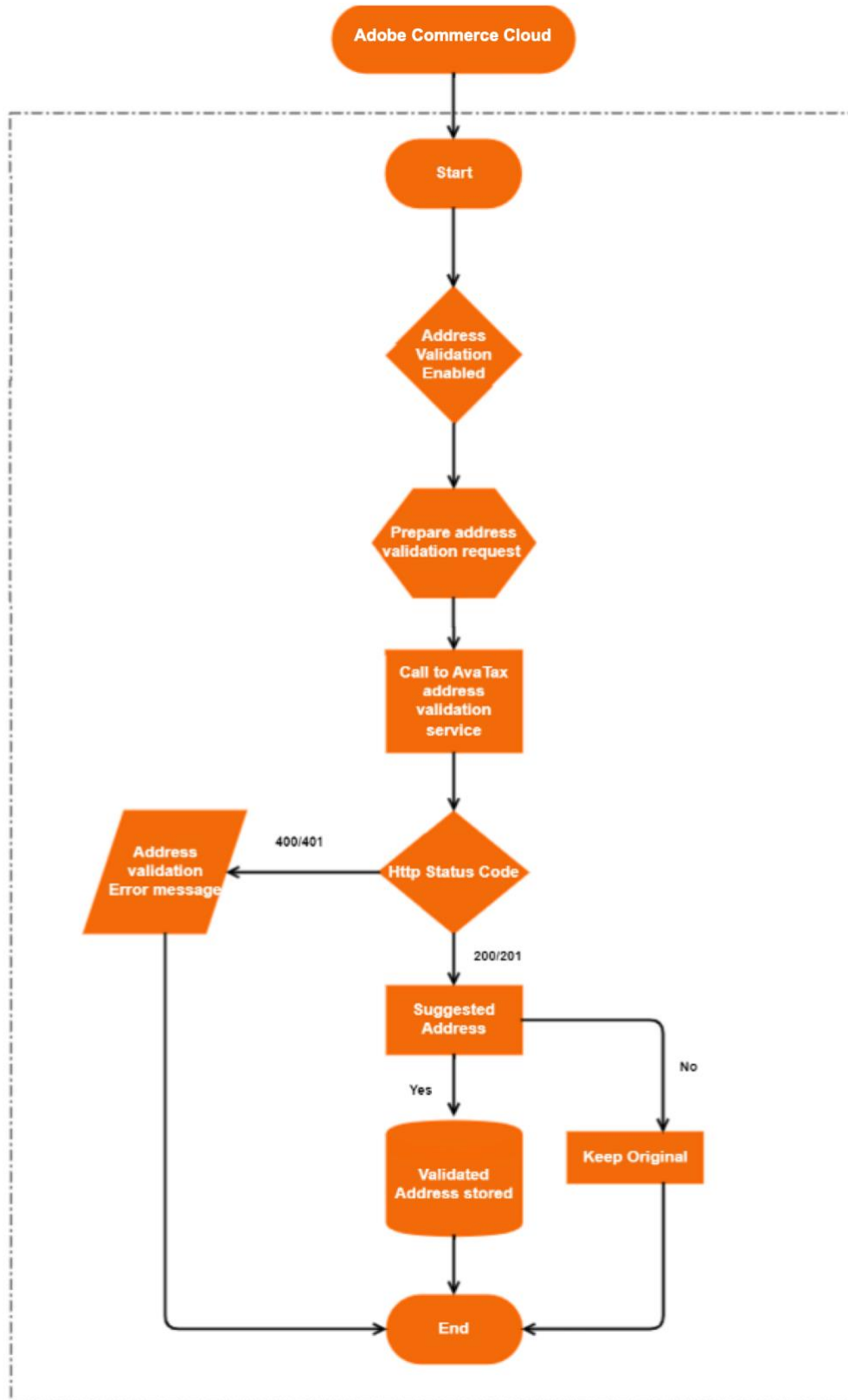
The following fields/attributes displays the integration points used for the Tax Calculation:

| Sr. No. | API Field | Adobe Commerce Field | Data Type | Description |
|---------|------------------|--|---------------|--|
| 1. | X-Avalara-Client | Header (Adobe Commerce Base URL) | String | <ul style="list-style-type: none"> App Name + App Version + Adapter Name + Adapter Version + Machine Name Example: Avalara for Adobe Commerce 2.3.1v2;2.3.1; PhpRestClient; 22.3.0; www.local-salestax.com |
| 2. | code | QuoteID/InvoiceID/CreditMemold | String | <ul style="list-style-type: none"> The internal reference code used by the client application. This is used for operations such as Get, Adjust, Settle, and Void. If you leave the transaction code blank, a GUID will be assigned to each transaction. Example: quote-1, INV000001, CM0000001 |
| 3. | lines | Product/QuoteItems/OrderItems/InvoiceItems/ProductTaxClasses | LineItemModel | <ul style="list-style-type: none"> A list of line items that will appear on this transaction. LineItemModel |
| 4. | type | entity_type from eav_entity_types | String | <ul style="list-style-type: none"> Specifies the type of document to create. A document type ending with Invoice is a permanent transaction that will be recorded in AvaTax. A document type ending with Order is a |

| Sr. No. | API Field | Adobe Commerce Field | Data Type | Description |
|---------|---------------------------|--|----------------|---|
| | | | | temporary estimate that will not be preserved. <ul style="list-style-type: none"> Example: SalesOrder, SalesInvoice, PurchaseOrder, Purchase Invoice, ReturnOrder, ReturnInvoice |
| 5. | companyCode | AvaTax Company Code | String | <ul style="list-style-type: none"> Specify the code of the company creating this transaction here. If you leave this value null, your account's default company will be used instead. |
| 6. | date | created_at | String | <ul style="list-style-type: none"> Transaction Date - The date on the invoice, purchase order, etc. |
| 7. | customerCode | Customer ID/Email depend upon Customer Code Format setting | String | <ul style="list-style-type: none"> The client application customer reference code. Note: This field is case sensitive. To have exemption certificates apply, this value should be the same as the one passed to create a customer. |
| 8. | entityUseCode | Based on Customer Class | String | <ul style="list-style-type: none"> The client application customer or usage type. |
| 9. | businessIdentificationNo | | | <ul style="list-style-type: none"> VAT business identification number for the customer for this transaction |
| 10. | currencyCode | Currency table | String | <ul style="list-style-type: none"> The three-character ISO 4217 currency code for this transaction. |
| 11. | exchangeRate | Currency rate table | Float | <ul style="list-style-type: none"> Currency exchange rate from this transaction to the company base currency. |
| 12. | exchangeRateEffectiveDate | Currency rate table | String | <ul style="list-style-type: none"> Effective date of the exchange rate. |
| 13. | reportingLocationCode | | String | <ul style="list-style-type: none"> Sets the sale location code (Outlet ID) for reporting this document to the tax authority. |
| 14. | purchaseOrderNo | Increment_id | String | <ul style="list-style-type: none"> Purchase Order Number for this document. |
| 15. | addresses | Address Tables | AddressesModel | <ul style="list-style-type: none"> Default addresses for all lines in this document. AddressesModel |
| 16. | parameters | AvaTax – General Config's transport and transport_shipping Shipping: "country:region:shipping method:amount currency" Example: "US:WA:flatrate_flatrate:50:00 USD" | String | <ul style="list-style-type: none"> Admin can assign separate Transport values for all enabled shipping methods, and this is sent in Tax Calculation request for the selected shipping method on Checkout. |

7.0 Workflows

Address Validation:



Tax Calculation:

