SAP Commerce-Avalara User Guide

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1 Getting Started

1.1 Connector Overview

The SAP Commerce-Avalara connector enhances the SAP Commerce system with new features including address verification and accurate tax calculation.

1.1.1 Features

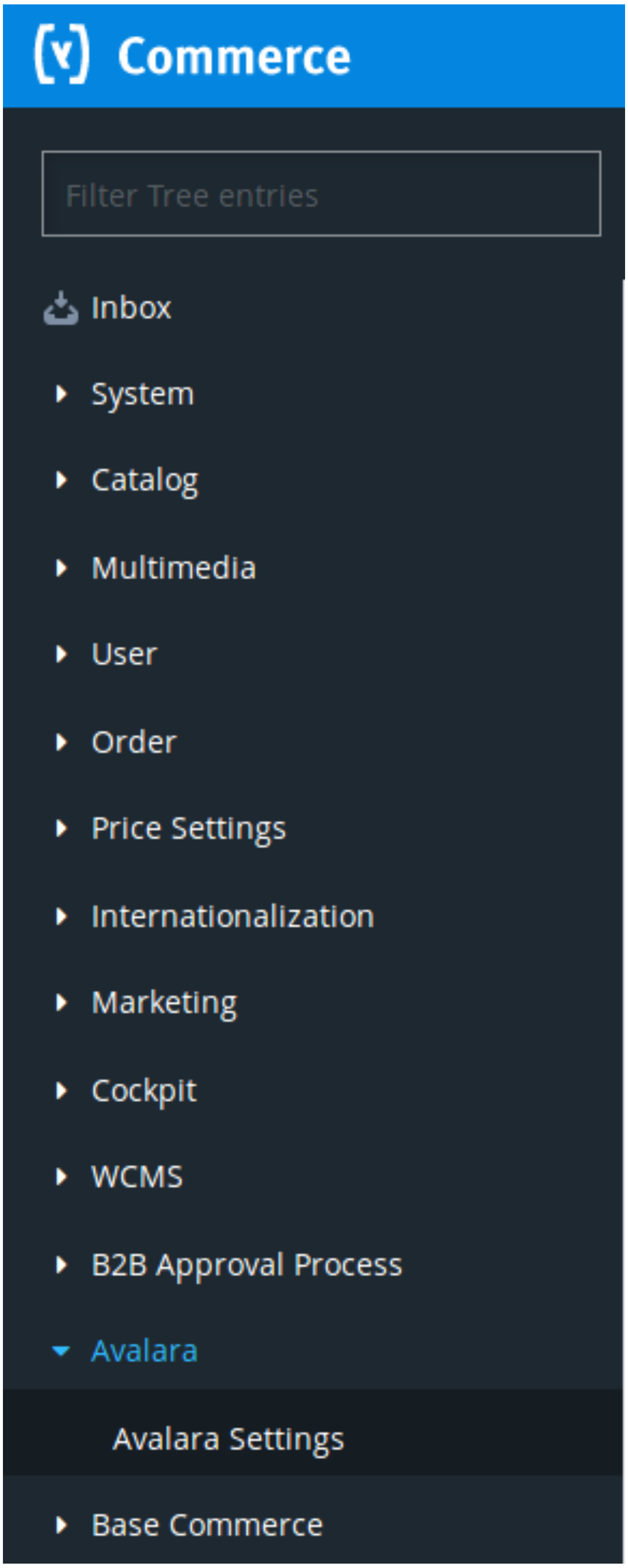
- Address verification on addresses.
- Accurately calculate tax rates through Avalara's extensive tax records.
- Setup and define product tax codes in Backoffice to handle tax exempt items.
- Setup and define customer certificates in Backoffice to handle tax exempt customers.
- Transactions will also be recorded on your Avalara, simplifying the tax filing process.

1.2 Prerequisites

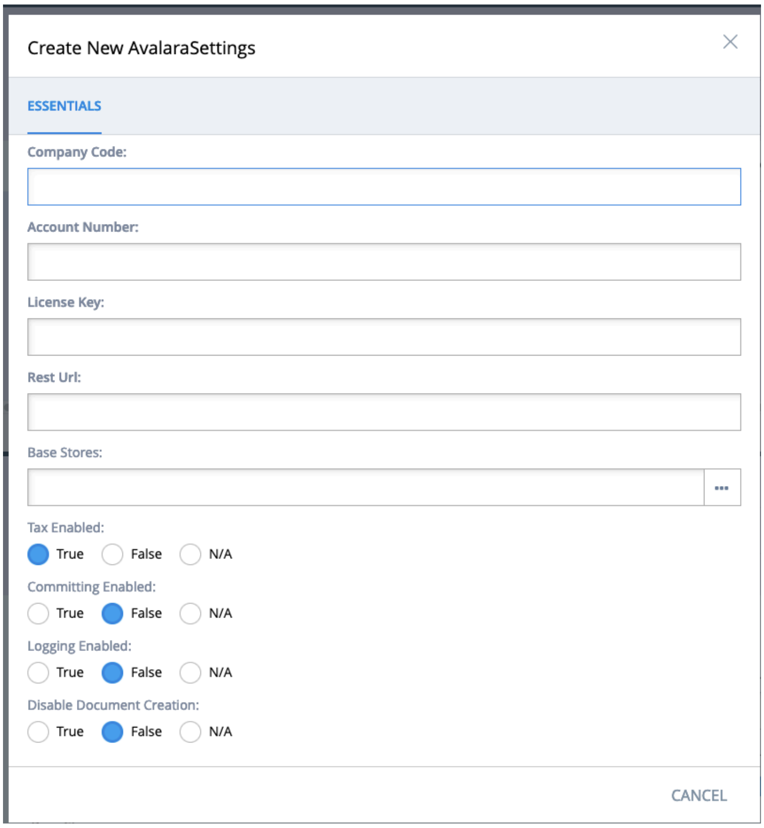
- An Avalara sandbox and production account
- An SAP Commerce system with an active license

2 Backoffice Settings

1. Login into the Backoffice, in development environments you can use *admin/nimda*.
2. In the navigation tree click on *Avalara Settings* found under *Avalara*.



3. Click on the + icon to open the Creation Wizard popup.



Create New AvalaraSettings

Company Code:

Account Number:

License Key:

Rest Url:

Base Stores:

Tax Enabled:
● True ○ False ○ N/A

Committing Enabled:
○ True ● False ○ N/A

Logging Enabled:
○ True ● False ○ N/A

Disable Document Creation:
○ True ● False ○ N/A

4. The mandatory fields are Company Code, Account Number, License Key, and Rest Url. Once these are provided the *Done* button will be available to be clicked on.

    a. By default, the Base Stores attribute will be empty. When used in a store context, the first Avalara Settings found will be used if none is specified.

    b. In addition, the following attributes are set to `False` by default:

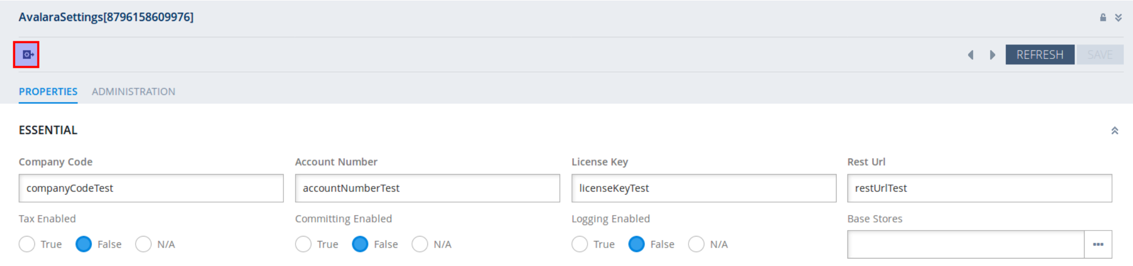
        i. **Tax Enabled**: If `False`, requests will not be sent to Avalara.

        ii. **Committing Enabled**: If `False`, transactions will not be marked as *Committed* in Avalara and therefore will not be available to be reported to a tax authority by Avalara Managed Returns.

        iii. **Logging Enabled**: If `False`, requests between SAP Commerce and Avalara will not be logged in the console.

        iv. **Disable Document Creation**: If `True` any calls to Avalara to request a tax calculation will be sent as a Sales Order request. Only calculations will be returned with no document created in the Avalara console.

5. Once created, the settings can be modified and tested in the editor view. To verify if the settings are correct click on the "Ping Icon" on the action bar. You should see a Ping Success or Error message.



AvalaraSettings[8796158609976]

ESSENTIAL

Company Code: companyCodeTest

Account Number: accountNumberTest

License Key: licenseKeyTest

Rest Url: restUrlTest

Tax Enabled: ○ True ● False ○ N/A

Committing Enabled: ○ True ● False ○ N/A

Logging Enabled: ○ True ● False ○ N/A

Base Stores:

3 Base Store Settings

To use Avalara, every store needs to be configured as below.

1. In the backoffice navigation tree expand the Base Commerce Node and click on Base Store to open the Base Store search window. Click the store from the result screen to populate the detail view.

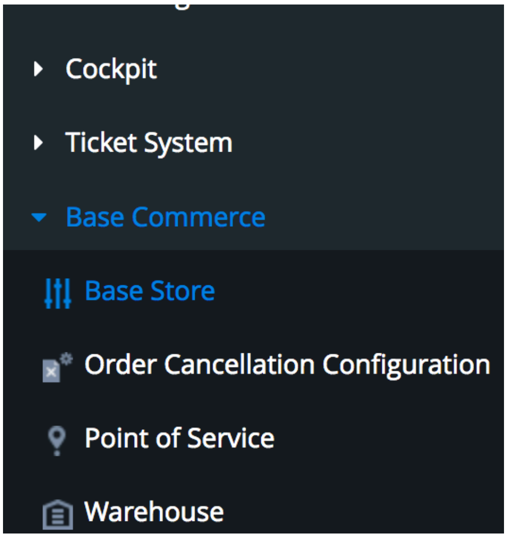
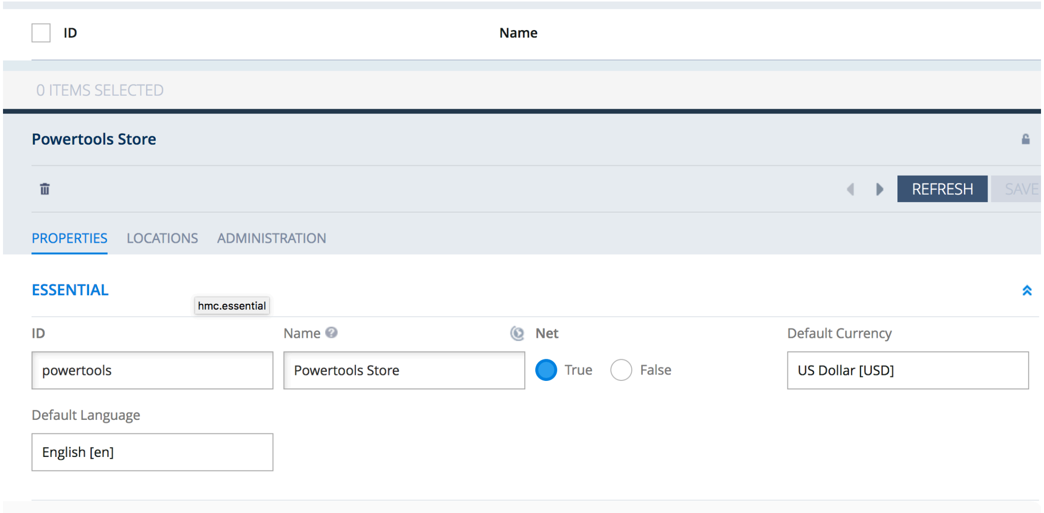


Figure 1 Navigation Tree

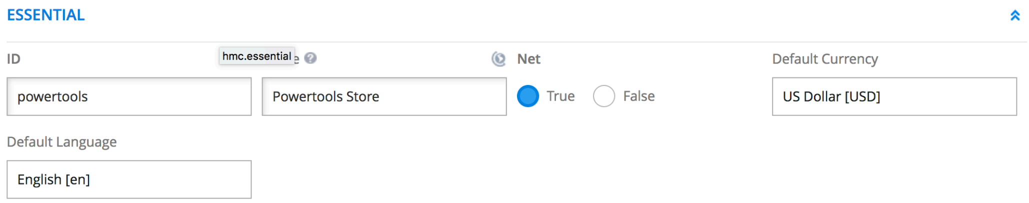


Powertools Store

ID	Name	Net	Default Currency
powertools	Powertools Store	● True ○ False	US Dollar [USD]
Default Language			
English [en]			

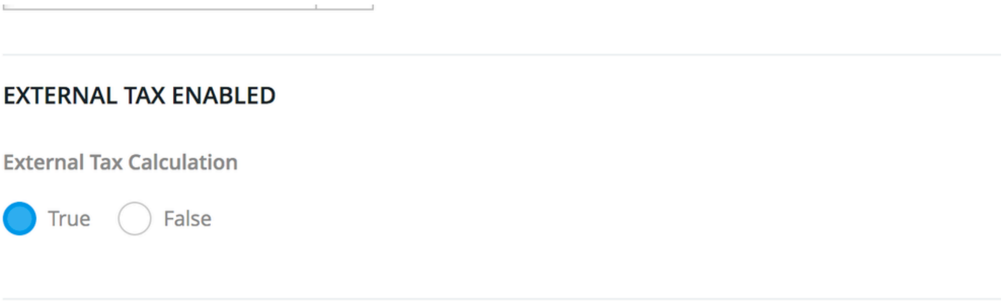
Figure 2 Detail View

2. Under the Properties tab select `True` on the Net property



ID		Net	Default Currency
powertools	Powertools Store	● True ○ False	US Dollar [USD]
Default Language			
English [en]			

3. Scroll down the window to locate the **External Tax Enabled** Setting and select `True` on that property.

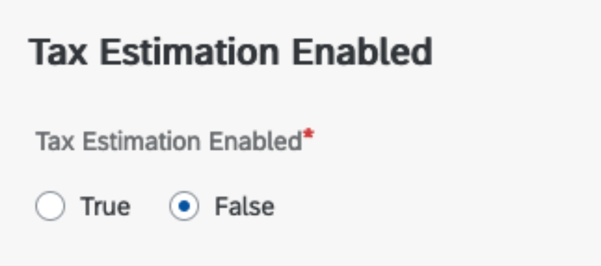


EXTERNAL TAX ENABLED

External Tax Calculation

● True ○ False

Possible Confusion
Make sure you enable the correct flag. There is a very similar configuration named: "**Tax Estimation Enabled**". Leave that setting as `False`!



Tax Estimation Enabled

Tax Estimation Enabled*

○ True ● False

4 Product Tax Codes

4.1 Creating a new Product Tax Code

1. Login to the SAP Commerce backoffice: https://127.0.0.1:9002/backoffice/
2. In the navigation tree expand the Avalara node and double click on Product Tax Codes to open the TaxCode Listing.

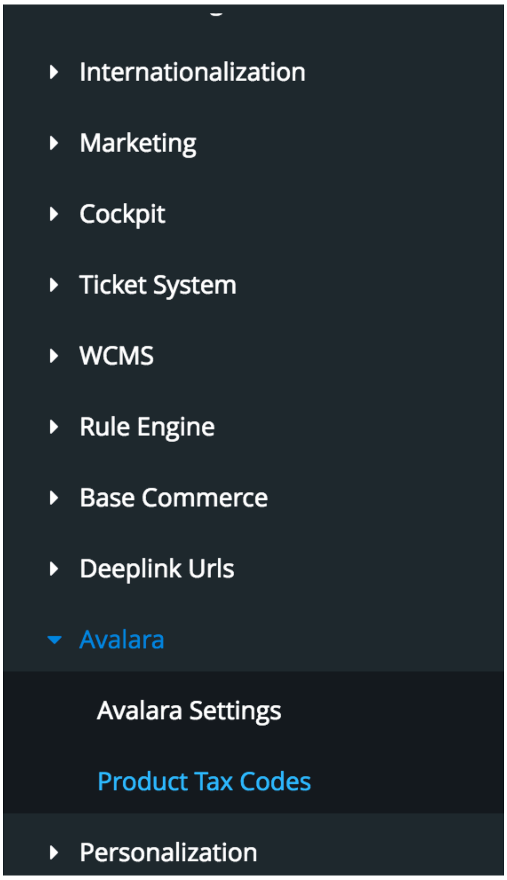
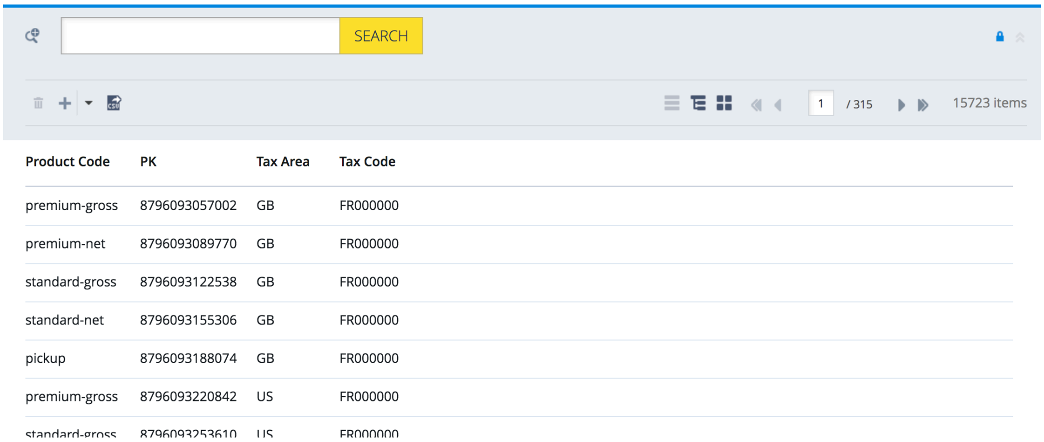


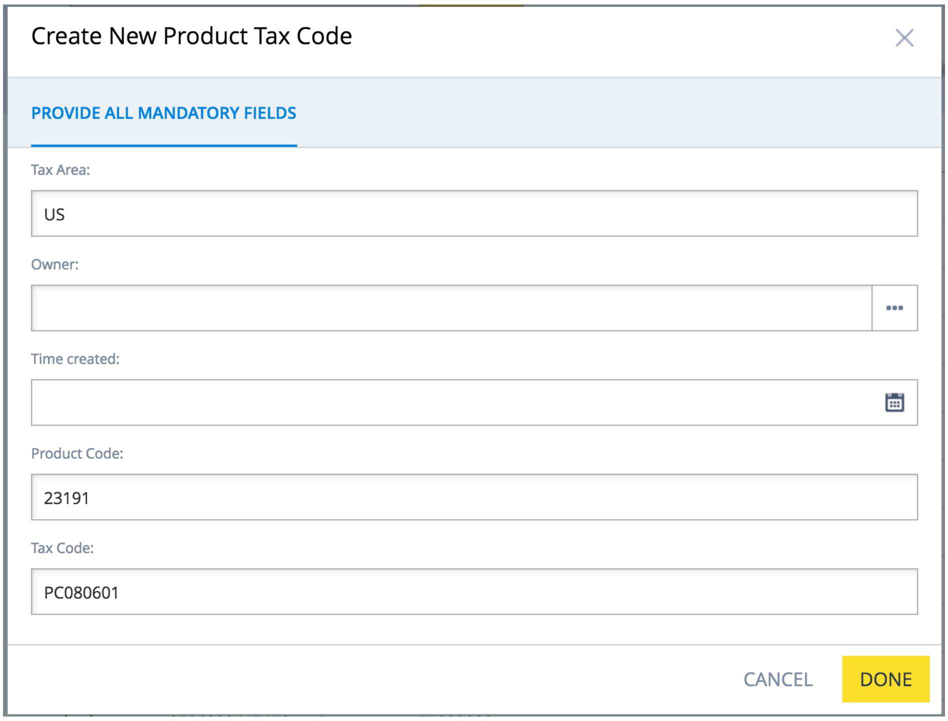
Figure 3 Navigation Tree



Product Code	PK	Tax Area	Tax Code
premium-gross	8796093057002	GB	FR000000
premium-net	8796093089770	GB	FR000000
standard-gross	8796093122538	GB	FR000000
standard-net	8796093155306	GB	FR000000
pickup	8796093188074	GB	FR000000
premium-gross	8796093220842	US	FR000000
standard-gross	8796093253610	US	FR000000

Figure 4 Result List

3. In the upper left, click the plus sign to open the item creation form The fields to enter are as below. All fields must be unique there cannot be duplicated records to Product Code and Tax Area. For example, a product with code 2231913 cannot have more than one code in the US area.
   a. Tax Area - The two character ISO code of the country (e.g., US for United States, GB for Great Britain, JP for Japan). **This field is not editable once the entry is created**
   b. Product Code - the code of the Product in SAP Commerce**. This field is not editable once the entry is created**
   c. Tax Code - the Avalara tax code (e.g., PC080601)



Create New Product Tax Code

PROVIDE ALL MANDATORY FIELDS

Tax Area: US

Owner:

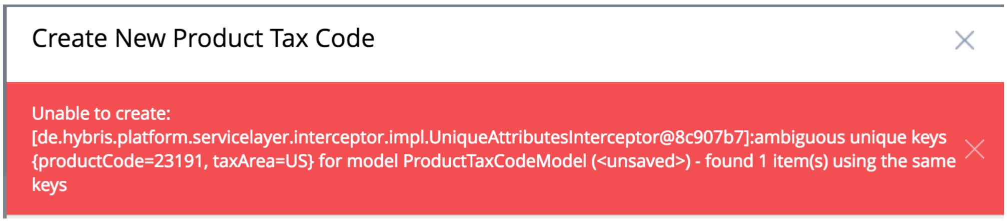
Time created:

Product Code: 23191

Tax Code: PC080601

Figure 5 Product Tax Code entry form

4. Once the form has been entered click done at the lower left. If there is already an entry in SAP Commerce for the Product Code, an error will show at the top of the form like below. If this happens the existing entry for the product code will need to be edited.



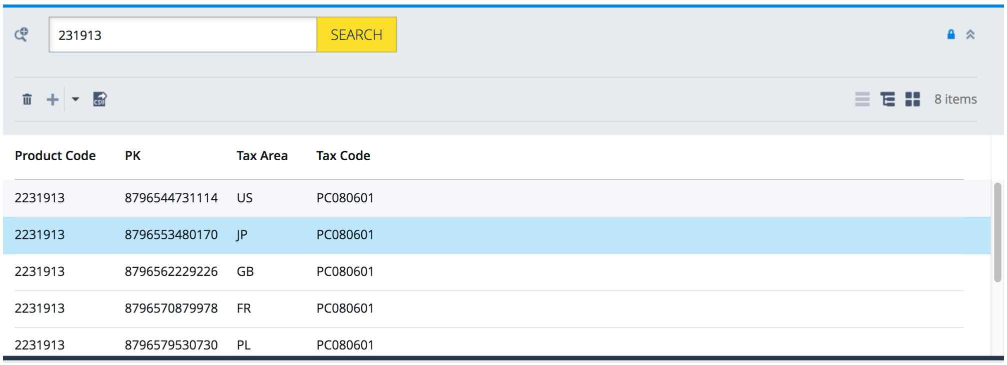
Create New Product Tax Code

Unable to create: [de.hybris.platform.servicelayer.interceptor.impl.UniqueAttributesInterceptor@8c907b7]:ambiguous unique keys {productCode=23191, taxArea=US} for model ProductTaxCodeModel (<unsaved>) - found 1 item(s) using the same keys

Figure 6 Error

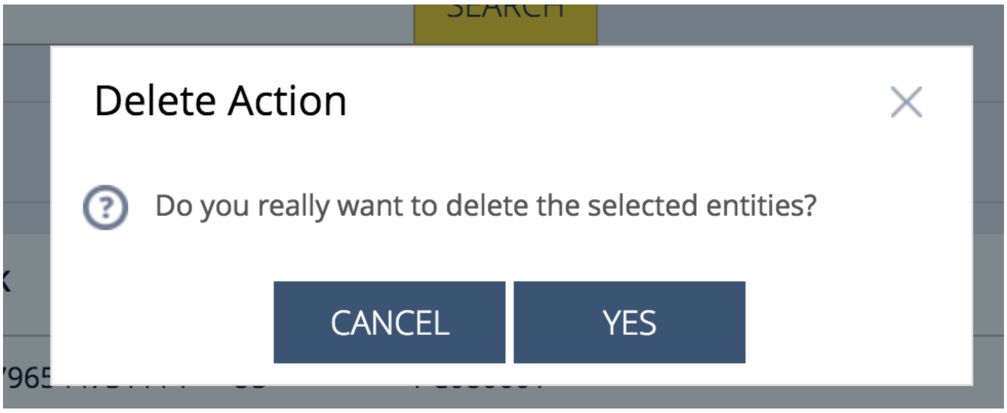
4.2 Editing an existing Product Tax Code

1. In the Backoffice explorer tree navigate to Avalara Settings -> Product Tax Codes (see screenshot above)
2. In the TaxCode listing enter either the Product Code or TaxCode and click Search to narrow down the results. Select the Entry you would like to delete and click the trash can at the upper left to remove it from the SAP Commerce database. A confirmation dialog will open and click yes to confirm the deletion



Product Code	PK	Tax Area	Tax Code
2231913	8796544731114	US	PC080601
2231913	8796553480170	JP	PC080601
2231913	8796562229226	GB	PC080601
2231913	8796570879978	FR	PC080601
2231913	8796579530730	PL	PC080601

Figure 7 Searching for product 23193

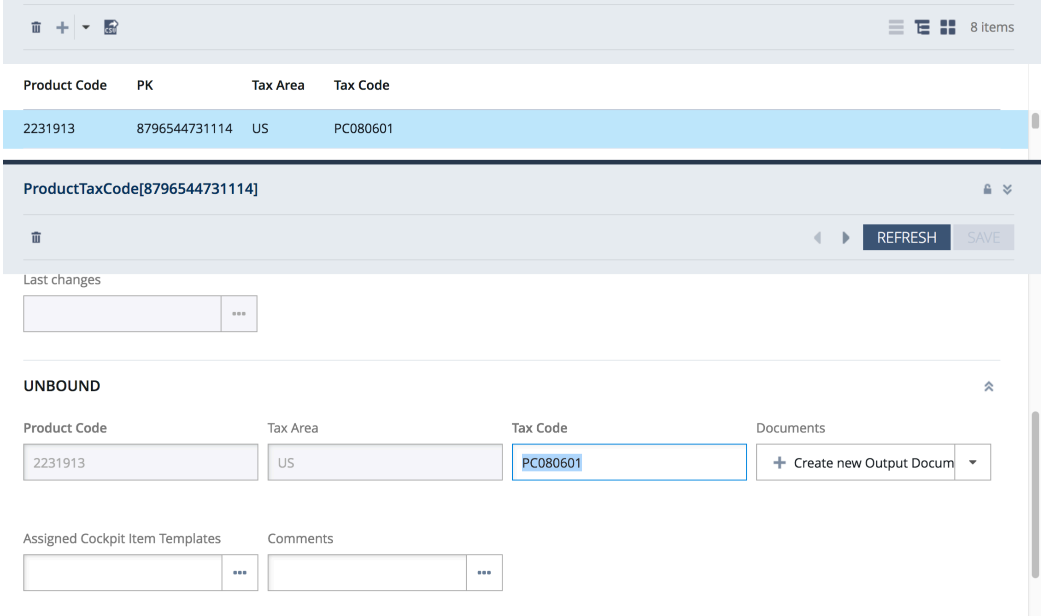

Delete Action

Do you really want to delete the selected entities?

Figure 8 Confirmation dialog

4.3 Deleting an existing Product Tax Code

1. In the backoffice explorer tree navigate to Avalara Settings -> Product Tax Codes (see screenshot above)
2. In the TaxCode listing enter either the Product Code or TaxCode and click Search to narrow down the results (see screenshot above).
3. Double-click the entry matching the country that needs to be edited to populate the detail view in the center panel. The only field that may be changed is the tax code. If any other field needs to be changed the record must be deleted and then recreated.



Product Code	PK	Tax Area	Tax Code
2231913	8796544731114	US	PC080601

Last changes:

Product Code: 2231913
Tax Area: US
Tax Code: PC080601
Documents:
Assigned Cockpit Item Templates:
Comments:

Figure 9 Detail View

5 Services Injection and Use Cases

5.1 ArvatoAvalaraTaxConnectorService

1. The default SAP Commerce out of the box usage will only make use of one method in `CalculateExternalTaxesStrategy.java` which is `AbstractOrderModel#calculateExternalTaxes`. This will do one of two actions based on the type of object that is passed in.
    a. **CartModel** will make a quote request against Avalara to get the calculated tax. This will not create any documents in the Avalara administration console
    b. **OrderModel** will create an invoice request against Avalara to calculate the taxes and create a document in `UNCOMMITTED` status in the Avalara administration console if the setting "Disable Document Creation" is set to false.
2. There is also support for cancellations, invoices, checks for previously created documents, adjustments, and tests for Avalara connectivity. Exception for the **ping** method, the return value for the other methods will be `Optional<ExternalTaxDocument>`. If nothing returned by Avalara, the response will be `Optional.empty()`.

5.1.1 CANCEL

To void a document, you will need to use the `ArvatoAvalaraTaxConnectorService.java` interface and inject it into the SAP Commerce cancellation service that is used. Consider the sample java class below that will set an order status to `CANCELLED` and then cancel the tax document. Also note the spring bean definition immediately after.

Cancel Example

```
public class SampleCancelRequestExecutor implements
OrderCancelRequestExecutor {
    private ModelService modelService;
    private ArvatoAvalaraTaxConnectorService
arvatoAvalaraTaxConnectorService;

    public void processCancelRequest(final OrderCancelRequest
orderCancelRequest,
            final OrderCancelRecordEntryModel cancelRequestRecordEntry)
throws OrderCancelException {
        AbstractOrderModel orderModel =
cancelRequestRecordEntry.getConsignment().getOrder();
        orderModel.setStatus(OrderStatus.CANCELLED);
        arvatoAvalaraTaxConnectorService.cancel(orderModel);
    }
}
```

5.1.2 INVOICE

This method is used to make a request to Avalara to get the tax calculations. It will also create a sales invoice in uncommitted status in the Avalara admin console. This would be used on a newly created order. Consider the below example for `OrderCalculationService.java` that will calculate the order total and send an invoice request to Avalara. Some exceptions to the document creation apply in the case where the setting to "Disable Document Creation" is set to `True` in which case this call will only request calculations from Avalara but not create a document.

Invoice Example

```
public class OrderCalculationService implements CalculationService {
    private ArvatoAvalaraTaxConnectorService
arvatoAvalaraTaxConnectorService;

    public void calculate(AbstractOrderModel order) {
        double subtotal = 0.0;
        for (final AbstractOrderEntryModel e : order.getEntries()) {
            someMethodThatCalculatesTheOrderEntryTotal(e);
            subtotal += e.getTotalPrice().doubleValue();
        }
        order.setTotalPrice(Double.valueOf(subtotal));
        if (order instanceof OrderModel) {
            arvatoAvalaraTaxConnectorService.invoice(order);
        }
    }
}
```

5.1.3 EXISTS

This method can be used to see it there is already a tax document created for an existing order in Avalara. Building on the above example we can add a check to first see there was already a tax request and for the order and if there is it will not make an invoice request.

Exists Example

```
public class OrderCalculationService implements CalculationService {
    private ArvatoAvalaraTaxConnectorService
arvatoAvalaraTaxConnectorService;

    public void calculate(AbstractOrderModel order) {
        double subtotal = 0.0;
        for (final AbstractOrderEntryModel e : order.getEntries()) {
            someMethodThatCalculatesTheOrderEntryTotal(e);
            subtotal += e.getTotalPrice().doubleValue();
        }
        order.setTotalPrice(Double.valueOf(subtotal));
        if (!order instanceof OrderModel) {
            return;
        }
        if (arvatoAvalaraTaxConnectorService.exists(order).empty()) {
            arvatoAvalaraTaxConnectorService.invoice(order);
        }
    }
}
```

5.1.4 ADJUST

Used to refund on an order. The order passed in will have its values negated and a new document is created in `COMMITTED` status with characters `_RET` appended to the tax document.

Adjust Example

```
public class OrderCalculationService implements CalculationService {
    private ArvatoAvalaraTaxConnectorService
arvatoAvalaraTaxConnectorService;

    public void calculate(AbstractOrderModel order) {
        double subtotal = 0.0;
        for (final AbstractOrderEntryModel e : order.getEntries()) {
            someMethodThatCalculatesTheOrderEntryTotal(e);
            subtotal += e.getTotalPrice().doubleValue();
        }
        order.setTotalPrice(Double.valueOf(subtotal));
        if (!order instanceof OrderModel) {
            return;
        }
        arvatoAvalaraTaxConnectorService.adjust(order);
    }
}
```

5.1.5 PING

This method can be used to ensure there is an active connection to Avalara. It will fail if there is a networking issue or if the user credentials are configured incorrectly in SAP Commerce. Building on the `OrderCalculationService.java` example from above:

Ping Example

```
public class OrderCalculationService implements CalculationService {
    private ArvatoAvalaraTaxConnectorService
arvatoAvalaraTaxConnectorService;

    public void calculate(AbstractOrderModel order) {
        double subtotal = 0.0;
        for (final AbstractOrderEntryModel e : order.getEntries()) {
            someMethodThatCalculatesTheOrderEntryTotal(e);
            subtotal += e.getTotalPrice().doubleValue();
        }
        order.setTotalPrice(Double.valueOf(subtotal));
        Optional<Boolean> pingResponse =
arvatoAvalaraTaxConnectorService.ping();
        if (!order instanceof OrderModel || pingResponse.empty() ||
Boolean.False.equals(pingResponse.get())) {
            return;
        }
        if (arvatoAvalaraTaxConnectorService.exists(order).empty()) {
            arvatoAvalaraTaxConnectorService.invoice(order);
        } else {
            arvatoAvalaraTaxConnectorService.adjust(order);
        }
    }
}
```

5.1.6 POST

This method can be used to mark a previously invoiced tax document as committed. This may be used after an order has shipped to commit the tax document in Avalara. Consider the below implementation of `Warehouse2ProcessAdapter.java` that will set the consignment status to `SHIPPED` and then check to see if all consignments have been shipped. If all consignments are shipped the post method will be invoked.

Post example

```
public class ShippingAdapter implements Warehouse2ProcessAdapter {
    private ModelService modelService;
    private ArvatoAvalaraTaxConnectorService
arvatoAvalaraTaxConnectorService;

    public void receiveConsignmentStatus(final ConsignmentModel
consignment, final WarehouseConsignmentStatus status) {
        consignment.setStatus(ConsignmentStatus.SHIPPED);
        modelService.save(consignment);
        boolean allShipped = true;
        for (ConsignmentModel consignment2 :
consignment.getOrder().getConsignments()) {
            allShipped = allShipped &&
(ConsignmentStatus.SHIPPED.equals(consignment2.getStatus()));
        }
        if (allShipped) {
            arvatoAvalaraTaxConnectorService.post(consignment.getOrder());
        }
    }
}
```

5.2 ArvatoAddressVerificationService

The `ArvatoAddressVerificationService.java` does not include new functionality. It is an implementation of the SAP Commerce out of the box `AddressVerificationService.java`. To inject the bean, add the code below into the spring.xml of your project.

```
<alias name="arvatoAddressVerificationService"
alias="addressVerificationService"/>
<bean id="arvatoAddressVerificationService"
class="com.arvatosystems.avalara.service.hybris.ArvatoAddressVerificationS
ervice"/>
```

5.3 ArvatoDecideExternalTaxesStrategy

The `ArvatoDecideExternalTaxesStrategy.java` interface customizes the default `shouldCalculateExternalTaxes` method. This returns a boolean that defines if tax calls will be made to Avalara. To modify this logic change the following alias in the spring.xml of your project.

```
<alias name="avalaraDecideExternalTaxesStrategy"
alias="decideExternalTaxesStrategy"/>
```

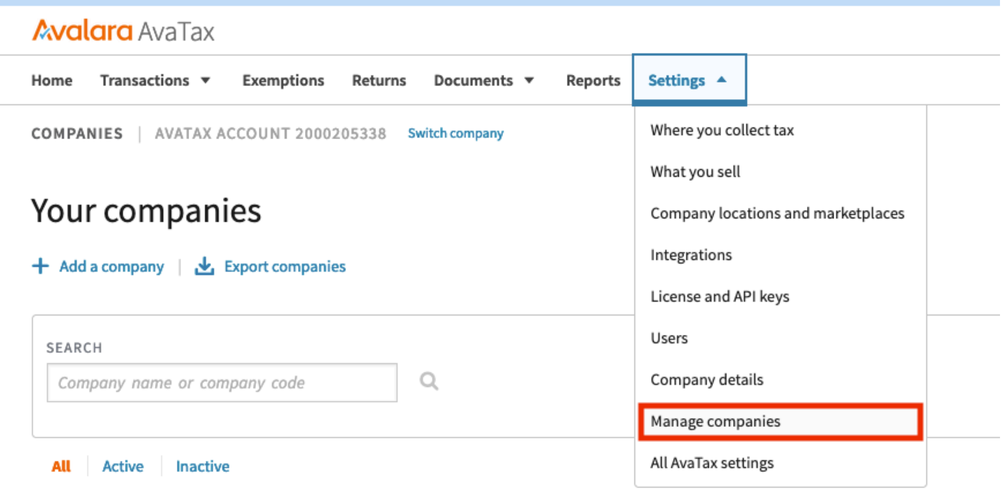
6 Cert Capture

6.1 Setup Cert Capture

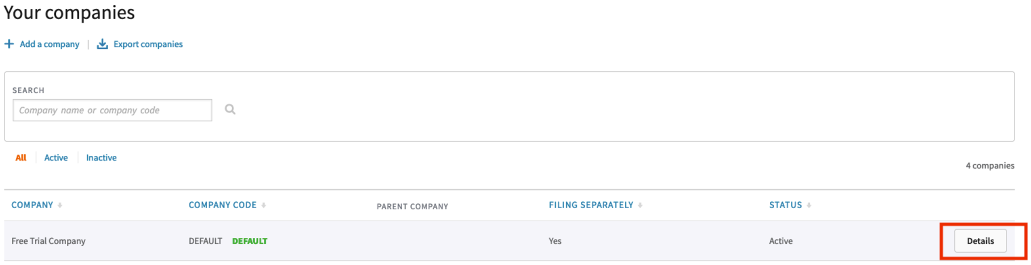
> **Info when upgrading**
> Cert Capture was an update added to the cert capture in 2021. If using a previous version of the connector that only did the tax calculation integrations it will be necessary to run the system update step outlined in the installation instructions: Avalara Extension Installation

Prior to using the cert capture integration with SAP Commerce it will be necessary to setup your company in the AvaTax dashboard to use certificates this can be accomplished following the below steps.

1. Sign into the AvaTax admin console at: https://admin.avalara.com for a production company or at https://sandbox.admin.avalara.com when using a testing environment.
2. Once signed in from the top Navigation click on Settings → Manage Companies

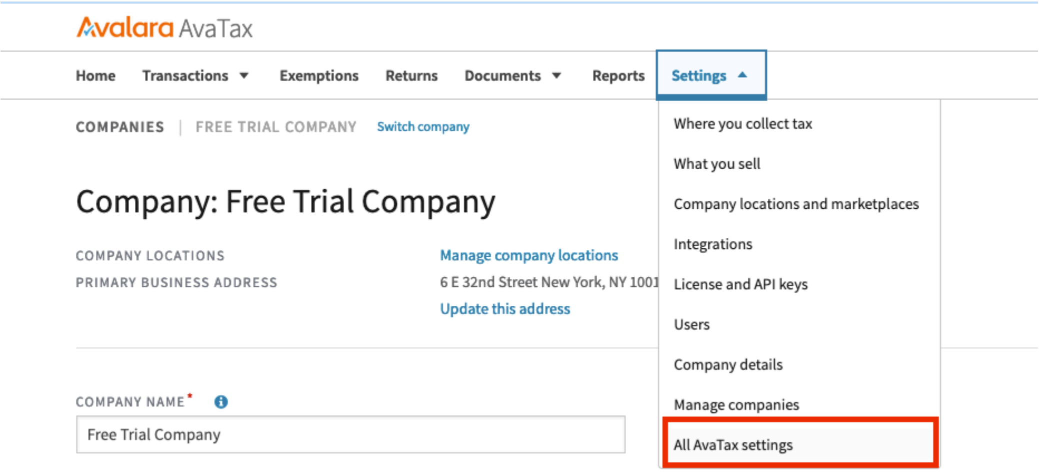


3. From the Company Listing screen click the Details button next to the company that cert capture should be configured for.



COMPANY	COMPANY CODE	PARENT COMPANY	FILING SEPARATELY	STATUS	
Free Trial Company	DEFAULT DEFAULT		Yes	Active	Details

4. From the Company Detail page again from the top navigation click Settings → All AvaTax setting.



Avalara AvaTax

Home | Transactions ▾ | Exemptions | Returns | Documents ▾ | Reports | Settings ▴

COMPANIES | FREE TRIAL COMPANY Switch company

Company: Free Trial Company

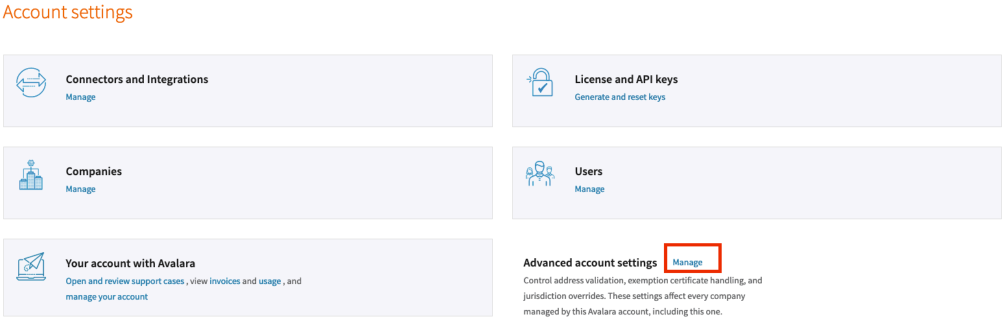
COMPANY LOCATIONS — Manage company locations

PRIMARY BUSINESS ADDRESS — 6 E 32nd Street New York, NY 1001

Update this address

COMPANY NAME* — Free Trial Company

5. From the Settings page scroll to the very bottom next to Advanced Account Settings click on "Manage"



Account settings

Connectors and Integrations — Manage

License and API keys — Generate and reset keys

Companies — Manage

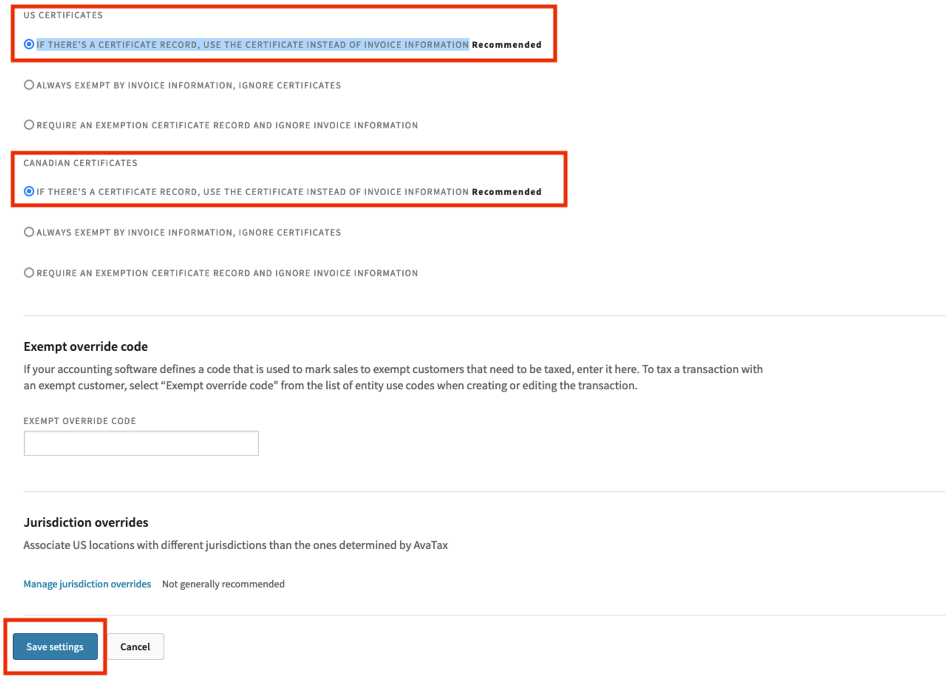
Users — Manage

Your account with Avalara — Open and review support cases , view invoices and usage , and manage your account

Advanced account settings — Manage

Control address validation, exemption certificate handling, and jurisdiction overrides. These settings affect every company managed by this Avalara account, including this one.

6. From the Advanced Settings page select the radio boxes next to "If there's a certificate record, use the certificate instead of invoice information" and click "Save Settings" at the bottom



US CERTIFICATES

● IF THERE'S A CERTIFICATE RECORD, USE THE CERTIFICATE INSTEAD OF INVOICE INFORMATION **Recommended**

○ ALWAYS EXEMPT BY INVOICE INFORMATION, IGNORE CERTIFICATES

○ REQUIRE AN EXEMPTION CERTIFICATE RECORD AND IGNORE INVOICE INFORMATION

CANADIAN CERTIFICATES

● IF THERE'S A CERTIFICATE RECORD, USE THE CERTIFICATE INSTEAD OF INVOICE INFORMATION **Recommended**

○ ALWAYS EXEMPT BY INVOICE INFORMATION, IGNORE CERTIFICATES

○ REQUIRE AN EXEMPTION CERTIFICATE RECORD AND IGNORE INVOICE INFORMATION

Exempt override code

If your accounting software defines a code that is used to mark sales to exempt customers that need to be taxed, enter it here. To tax a transaction with an exempt customer, select "Exempt override code" from the list of entity use codes when creating or editing the transaction.

EXEMPT OVERRIDE CODE

Jurisdiction overrides

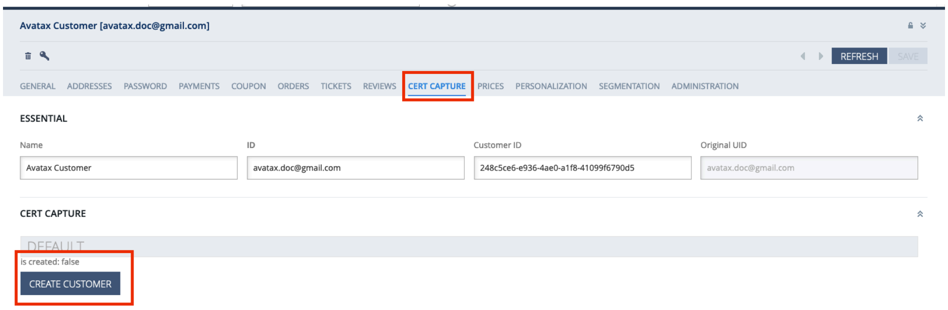
Associate US locations with different jurisdictions than the ones determined by AvaTax

Manage jurisdiction overrides   Not generally recommended

6.2 Backoffice Integrations

6.2.1 Customer Creation

1. Sign into the SAP Commerce backoffice
2. From Users → Customers find a customer that should have certificate exemptions.
3. From the customer detail view click on the Cert Capture tab.
    a. This tab will have a listing for each company with an Avalara setting that has been configured in SAP Commerce.
    b. If a customer has not been setup for cert capture in Avalara yet it will show "false" next to is created and the "Create Customer" will be enabled.
    c. For a customer to correctly be created an address is required to be assigned to the customer. The Default address selection strategy SAP Commerce will attempt to send up will to first use the default billing address but if that is not set it will fall back to the default shipping address.
    d. If all of that is setup in SAP Commerce correctly Clicking "Create Customer" should show a message in the notification area that the customer was created successfully in green.



Avatax Customer [avatax.doc@gmail.com]

ESSENTIAL

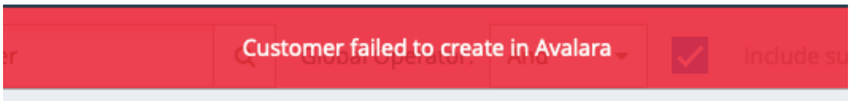
Name: Avatax Customer
ID: avatax.doc@gmail.com
Customer ID: 248c5ce6-e936-4ae0-a1f8-41099f6790d5
Original UID: avatax.doc@gmail.com

CERT CAPTURE

DEFAULT

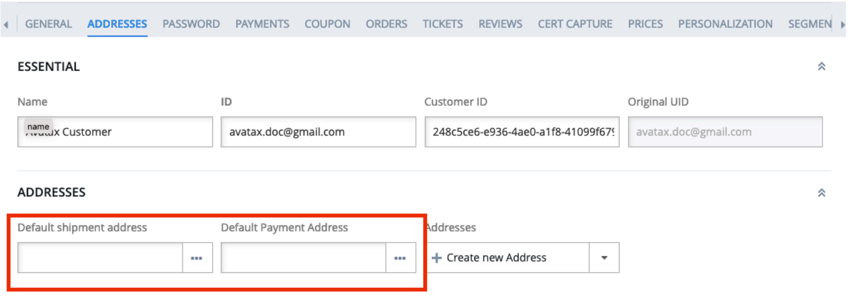
is created: false

    i. If not, it will show an error in red "Customer failed to create in Avalara". If an error is shown be sure to verify that the Ping test passes under the Avalara settings configured for the company where the create customer button was pressed and that the customer has a valid default billing address or valid default shipping address.



Customer failed to create in Avalara

Figure 10 Failure message



ESSENTIAL

Name: Avatax Customer
ID: avatax.doc@gmail.com
Customer ID: 248c5ce6-e936-4ae0-a1f8-41099f67
Original UID: avatax.doc@gmail.com

ADDRESSES

Default shipment address
Default Payment Address
Addresses

    e. After adding a default payment address the notification area of the backoffice will show this message after clicking the "create customer" button

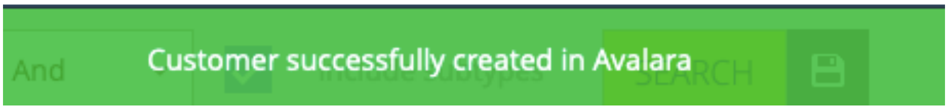
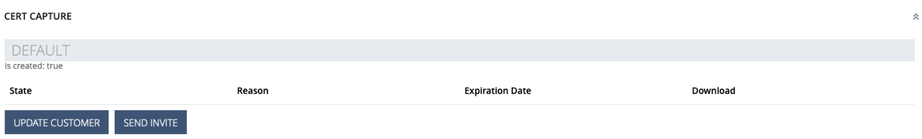

Customer successfully created in Avalara

Figure 11 Success message

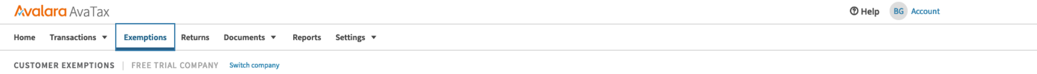
f. Once the customer has been successfully created the cert capture panel will refresh showing "is created: true" along with an empty list of exemption certificates and two buttons to "Update Customer" and "Send Invite"


CERT CAPTURE

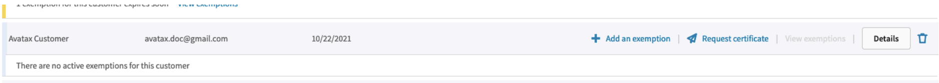
DEFAULT
is created: true

State	Reason	Expiration Date	Download

4. Final verification can be done through the Avalara dashboard. Login at admin.avalara.com (or sandbox.admin.avalara.com if using a testing environment).
5. From the top navigation select exemptions

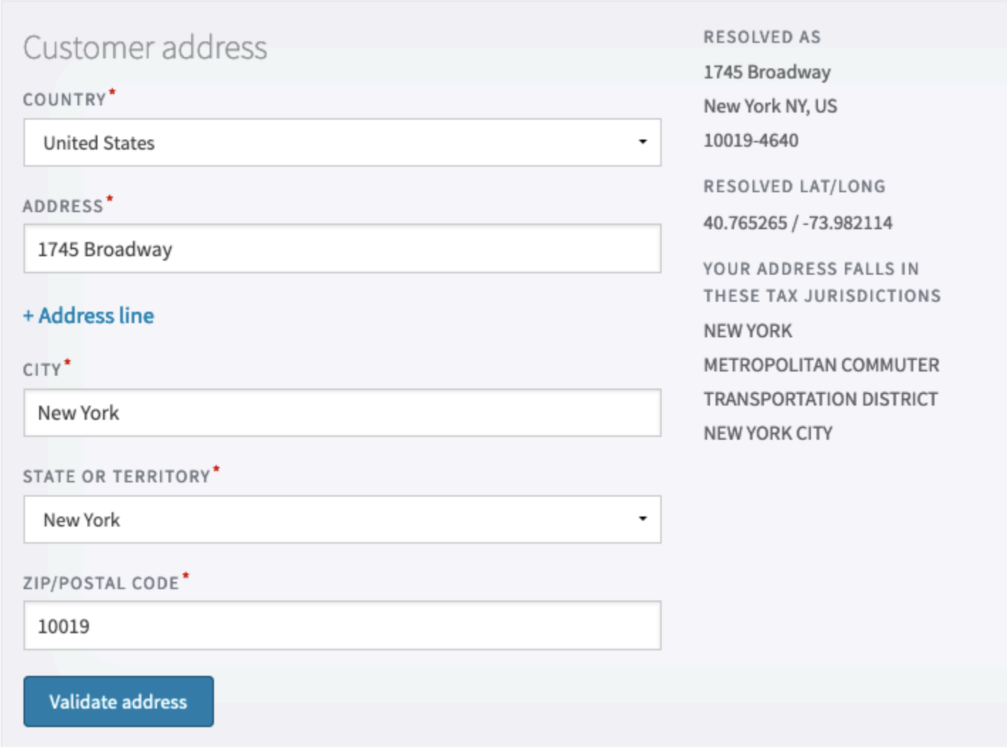


6. Scroll down and verify a customer has been created. The ID of the customer will match the uid property of the customer from SAP Commerce.


Avatax Customer avatax.doc@gmail.com 10/22/2021

There are no active exemptions for this customer

7. Finally click on the details button next to the customer entry and verify the address matches that of the default billing (or shipping) address from SAP Commerce


Customer address

COUNTRY*: United States

ADDRESS*: 1745 Broadway

CITY*: New York

STATE OR TERRITORY*: New York

ZIP/POSTAL CODE*: 10019

RESOLVED AS
1745 Broadway
New York NY, US
10019-4640

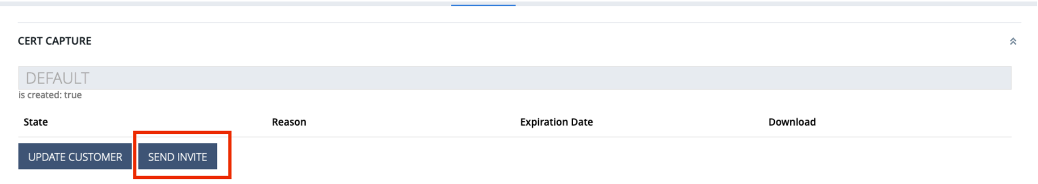
RESOLVED LAT/LONG
40.765265 / -73.982114

YOUR ADDRESS FALLS IN THESE TAX JURISDICTIONS
NEW YORK
METROPOLITAN COMMUTER TRANSPORTATION DISTRICT
NEW YORK CITY

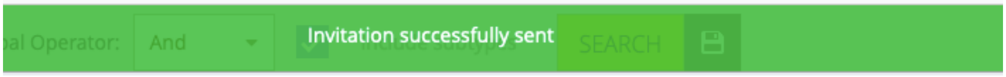
6.2.2 Customer Invitations

This extension provides a way to send an email out to a customer inviting them to create an exemption certificate if the customer has a previously created record in Avalara and the customer uid in SAP Commerce matches the customer code in Avalara. To send out an invite follow the below steps.

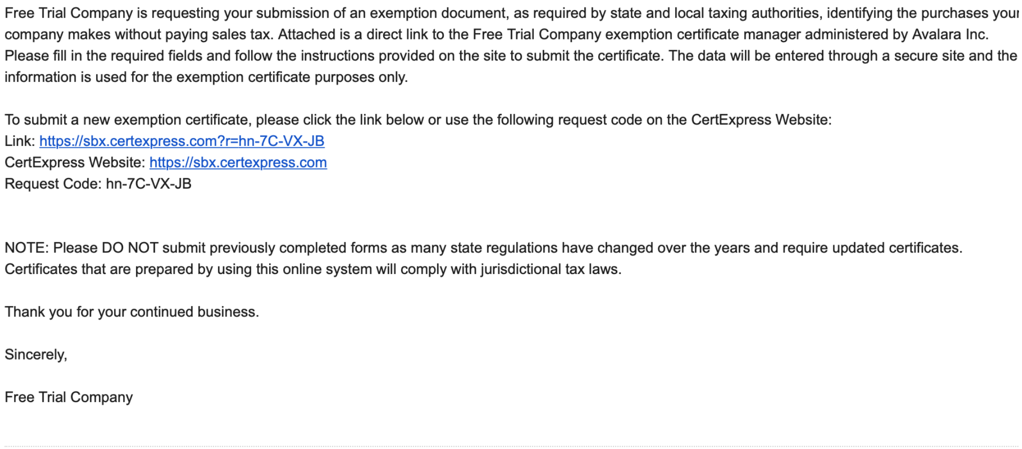
1. Log into the SAP Commerce backoffice
2. From Users → Customers search for a customer that has a record in Avalara.
3. In the Customer Detail view select the Cert Capture Tab and click the "Send Invite" Button from under the company you want them to create their certificate. Much like when creating a customer, the address email will be used from the default billing address, if the default billing address is not existent it will use the email from the default shipping address.



4. After Clicking "Send Invite" The notification of the backoffice will show a success message in green or a failure message in red. If a failure Message appears, make sure there is a default billing address or shipping address, and a valid email message has been entered for the email property. As a final fallback if neither the defaultBilling or defaultShipping have an email address filled in it will attempt to use `CustomerModel.contactEmail`.


Invitation successfully sent

5. From the customer side they will receive an email like in the below screenshot with a link they can click on to either upload a certificate image or have one generated by Avatax after filling out a form.


Free Trial Company is requesting your submission of an exemption document, as required by state and local taxing authorities, identifying the purchases your company makes without paying sales tax. Attached is a direct link to the Free Trial Company exemption certificate manager administered by Avalara Inc. Please fill in the required fields and follow the instructions provided on the site to submit the certificate. The data will be entered through a secure site and the information is used for the exemption certificate purposes only.

To submit a new exemption certificate, please click the link below or use the following request code on the CertExpress Website:
Link: https://sbx.certexpress.com?r=hn-7C-VX-JB
CertExpress Website: https://sbx.certexpress.com
Request Code: hn-7C-VX-JB

NOTE: Please DO NOT submit previously completed forms as many state regulations have changed over the years and require updated certificates. Certificates that are prepared by using this online system will comply with jurisdictional tax laws.

Thank you for your continued business.

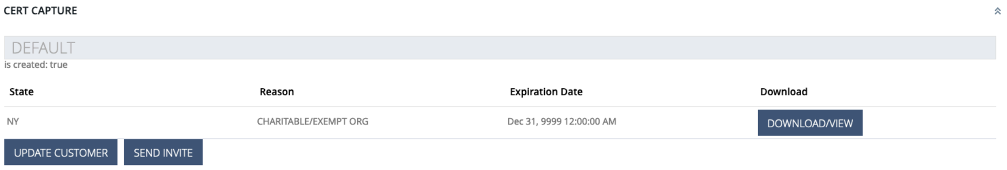
Sincerely,

Free Trial Company

6.2.3 Certificate Downloads

After a customer has either generated a certificate or uploaded one it is possible to view them in the hybris backoffice. To do this follow the below steps

1. Log into the SAP Commerce backoffice
2. Find a Customer under Users → Customers that has previously created an exemption certificate via a previous email invitation
3. Click on the Cert Capture Tab
4. If the customer previously created an exemption certificate they will now show under the exemptions list like below.



is created: true

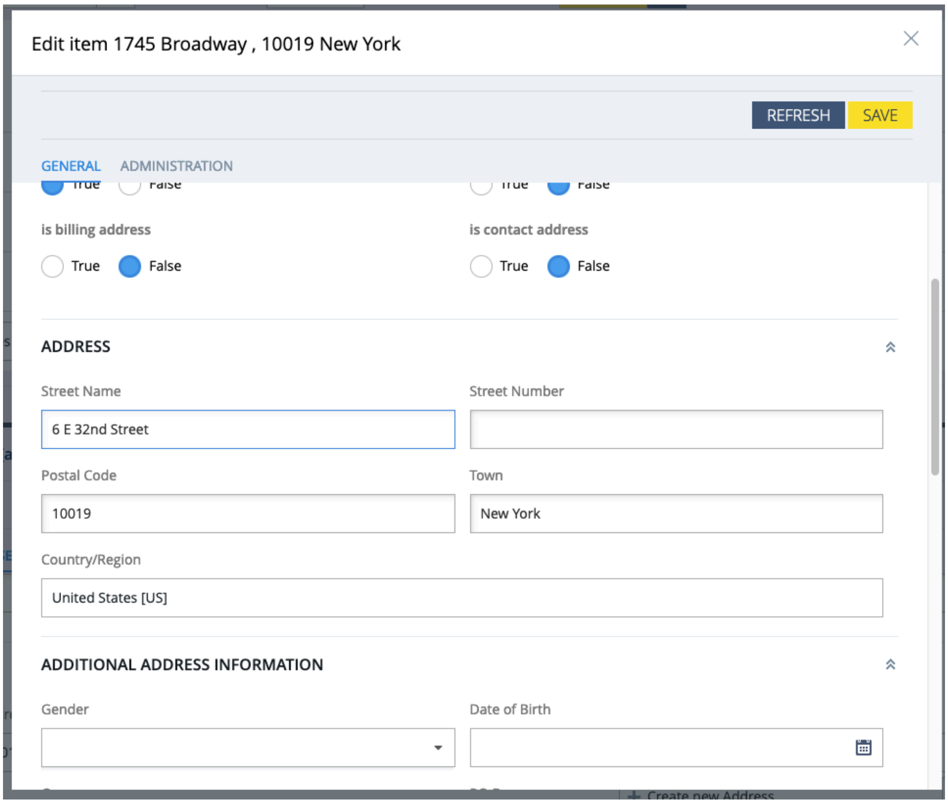
State	Reason	Expiration Date	Download
NY	CHARITABLE/EXEMPT ORG	Dec 31, 9999 12:00:00 AM	DOWNLOAD/VIEW

5. To download a copy of the certificate for viewing or printing, click the Download/View button next to the entry to download. A sample file is attached here: example-customer-certificate.pdf

6.2.4 Customer Updates

If a customer address associated with an exemption certificate is changed at any point there is a way to send this information to Avatax. The below steps will walk you through that process:

1. Log into the SAP Commerce backoffice
2. Under Users → Customers find a customer that has a customer record under the Avatax exemptions.
3. Click the Update button under the certificate listing.
   a. If a Default billing address is created that will be sent to Avalara to change the record
   b. If a Default billing address is not defined on the customer record the default shipping will be sent if that exists See the below updated address in backoffice the street has changed form and the zip code



Edit item 1745 Broadway , 10019 New York

is billing address: ○ True ● False

is contact address: ○ True ● False

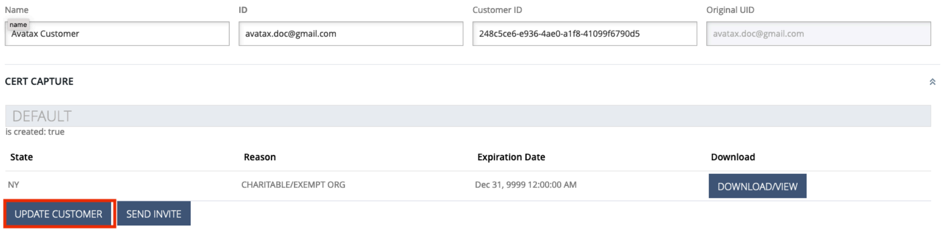
ADDRESS

Street Name: 6 E 32nd Street	Street Number:
Postal Code: 10019	Town: New York
Country/Region: United States [US]	

ADDITIONAL ADDRESS INFORMATION

Gender:	Date of Birth:

c. Click the Update button under the Cert Capture Tab



Name	ID	Customer ID	Original UID
Avatax Customer	avatax.doc@gmail.com	248c5ce6-e936-4ae0-a1f8-41099f6790d5	avatax.doc@gmail.com

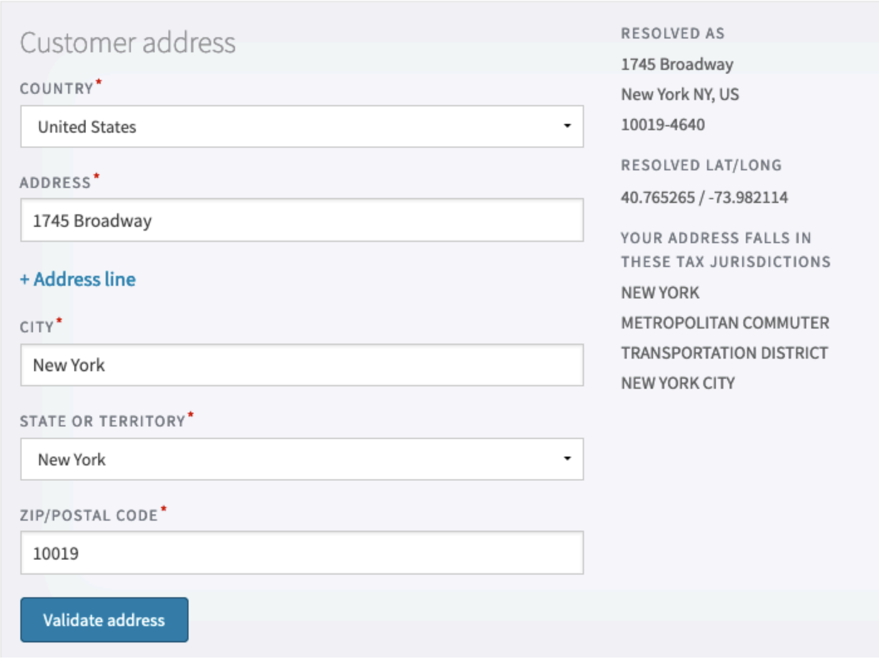
CERT CAPTURE

DEFAULT

is created: true

State	Reason	Expiration Date	Download
NY	CHARITABLE/EXEMPT ORG	Dec 31, 9999 12:00:00 AM	DOWNLOAD/VIEW

d. If successful, the notification area will show a green success message. If there is an error, check the default billing or shipping address for the customer record. Verify the Avatax exemption customer record for the changed address



Customer address

COUNTRY*
United States

ADDRESS*
1745 Broadway

+ Address line

CITY*
New York

STATE OR TERRITORY*
New York

ZIP/POSTAL CODE*
10019

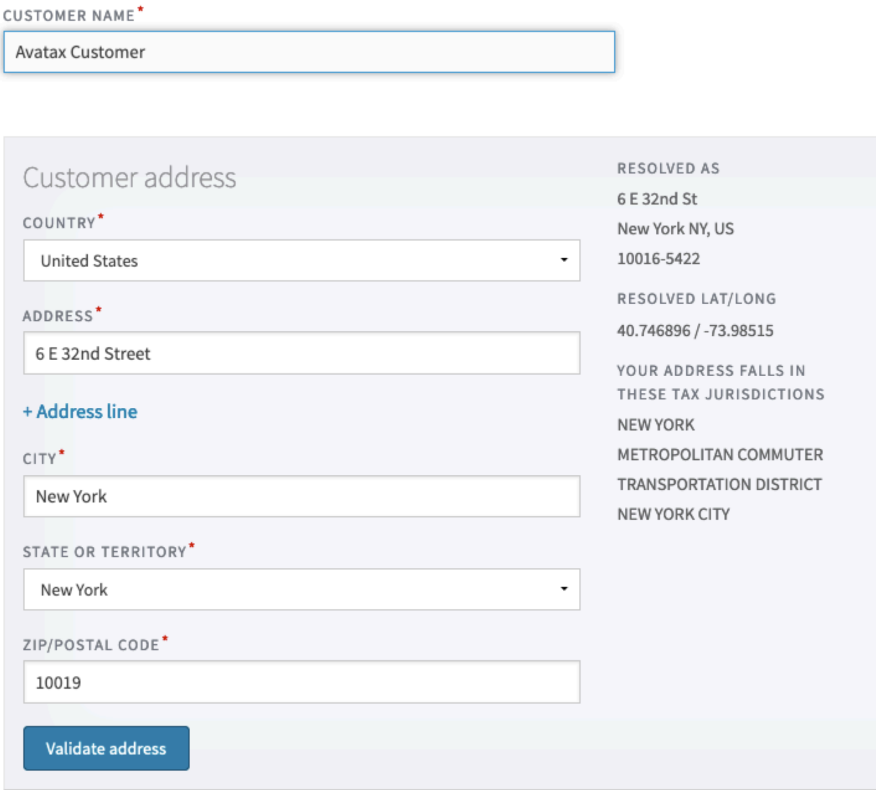
Validate address

RESOLVED AS
1745 Broadway
New York NY, US
10019-4640

RESOLVED LAT/LONG
40.765265 / -73.982114

YOUR ADDRESS FALLS IN THESE TAX JURISDICTIONS
NEW YORK
METROPOLITAN COMMUTER TRANSPORTATION DISTRICT
NEW YORK CITY

Figure 12 Old Record



CUSTOMER NAME*
Avatax Customer

Customer address

COUNTRY*
United States

ADDRESS*
6 E 32nd Street

+ Address line

CITY*
New York

STATE OR TERRITORY*
New York

ZIP/POSTAL CODE*
10019

Validate address

RESOLVED AS
6 E 32nd St
New York NY, US
10016-5422

RESOLVED LAT/LONG
40.746896 / -73.98515

YOUR ADDRESS FALLS IN THESE TAX JURISDICTIONS
NEW YORK
METROPOLITAN COMMUTER TRANSPORTATION DISTRICT
NEW YORK CITY

Figure 13 New Record

6.3 Cert Capture ‧ Services

Provided in the extension is a service that can be used for custom code where API calls are necessary to integrate with Avalara's CertCapture features.

Convenience Methods
Each of the below methods within the `ArvatoAvalaraCertCaptureService.java` has a corresponding method that does not take the **AvalaraSettingsModel settings** parameter. This is useful if the setup only has one AvalaraSetting used throughout. If there are more than one AvalaraSetting used, then it will be necessary to pass the AvalaraSettingsModel argument into the methods for the correct company integration to be called.

6.3.1 ArvatoAvalaraCertCaptureService

createCustomer(CustomerModel customer, AvalaraSettingsModel settings)

Parameters

`customer` - the SAP Commerce CustomerModel that should have a record created in cert capture.

`settings` - AvalaraSettingsModel corresponding to the company that should have a record created

Returns

Returns a Boolean which will be `True` if the customer was successfully created. If False is returned verify that the customerModel being passed up has a defaultPaymentAddress or defaultShippingAddress as an address is required to create the customer. Other things to check if `False` is returned is that the customer record has not already been created in cert capture and that the AvalaraSettings are correctly configured. The `customer.uid` is the property used to map the customer code on Avalara's side.

customerExists(CustomerModel customer, AvalaraSettingsModel settings)

Parameters

`customer` - the SAP Commerce CustomerModel to be checked if already created on Avalara's end.

`settings` - AvalaraSettingsModel corresponding to the company that should have the record checked

Returns

`True` will be returned if an existing customer record is created in Avalara where the `customer.uid` matches the customer code on Avalara's end. `False` will be returned if no customer record can be found or if the settings passed are invalid and not able to connect through Avalara's API.

sendCustomerInvite(CustomerModel customer, AvalaraSettingsModel settings)

Parameters

`customer` - The SAP Commerce CustomerModel to have an autogenerated email from Avalara sent to. The email will have a link the customer can click to have a document generated. The `customerModel.uid` should match a customer code in Avalara. Also, the default email address the invite will be sent to will be based first on the customers `defaultPaymentAddress.emailAddress` if there is no defaultPayment address it will use the email address from `customer.defaultShippingAddress`, if neither of these exist it will use the email address from `customer.contactEmail`.

`settings` - AvalaraSettingsModel corresponding to the company that should have the invite sent to.

Returns

Returns `True` if an invite was successfully sent by Avalara. If `False` is returned ensure the `customerModel.uid` matches the customer code in Avalara. Also verify the AvaralaSettingsModel is correctly configured correctly

getCertificatesForCustomer(CustomerModel customer, AvalaraSettingsModel settings)

Parameters

`customer` - The SAP Commerce CustomerModel to retrieve the certificates for.

`settings` - AvalaraSettingsModel corresponding to the company that the certificates should be retrieved for.

Returns

`List<AvataxCertificatesData>` - The AvataxCertificatesData is a generated POJO defined in `arvatoAvalaraConnector-beans.xml`. It has various properties for each certificate including `expirationDate`, `exemptionReason`, `exemptionNumber`, `exposureZone`, `signedDate`, `fileName` among others.

getCertificatesInfoForCustomer(CustomerModel customer)

Parameters

`customer` - the SAP Commerce CustomerModel to retrieve the certificate info for.

Returns

CustomerCertificatesData - A generated POJO defined in arvatoAvalaraConnector-beans.xml. It is a wrapper object with a list of all certificates for all companies for the customer.

`Long pk` - pk of CustomerRecord in SAP Commerce

`String uid` - customer.uid

`List<CompanyCertificatesWrapperData>`

`boolean created` - indicates if the customer has a record in Avalara for the corresponding company

`Long settingsPK` - AvalaraSettingsModel.PK this entry is attached to

`String companyName`

`List<AvataxCertificatesData>` - all certificates this customer has for the corresponding company

downloadCertificate(Integer certificateId, AvalaraSettingsModel settings)

Parameters

`certificateId` - the certificate identifier that is needed to be downloaded from Avalara. This value can be retrieved from a `AvataxCertificatesData.id` property.

`settings` - AvalaraSettingsModel corresponding to the company that the certificates should be retrieved for.

Returns

A PDF file that can be saved to a local system for later usage.