



Configuration Training steps:

- a) You'll need to have set up Avalara per the instructions they gave you during training
 - a. Create company (remember code)
 - b. Create user
 - c. Create password
 - d. Upload item codes
 - e. Setup tax codes
 - f. Assign item codes to tax codes
- b) You'll need the license, user, password, etc. that they mailed you.
 - a. This came in the form of a PDF via email
 - b. We'll need the testing web site and the live web site from that form
 - c. If you don't have this information give Avalara a call.
- c) You need to have set up 3 Tax Rates within Sage PFW
 - a. Exempt Rate for Exempt customers – example: EX
 - b. Non-Exempt-Item Rate for items that are non-exempt for Exempt customers – Example: NEX
 - c. Tax in Item Rate for items that have the tax already calculated into the price – Example: TIP
- d) You'll need to know the GL code for the Taxes – you only get one as there are too many sent back from Avalara to assign a GL account for each tax authority.
- e) You'll need to know your item code for taxable Freight
 - a. This is a line item you would have set up in Sage PFW that is non stocking
 - b. You'll need to know the 'Tax code' you set up for this 'Item code' on the Avalara web site.
- f) You'll need to have set up a 'Non-Inventory' item code on the Avalara 'Item code' site
 - a. You'll need to know the 'Tax code' you set up for this 'Item code' on the Avalara web site.
- g) You'll need to have viewed the 5 videos at <http://www.d-b-s.com>
 - a. click on DBS Products tab
 - b. click on the DBS Avalara button on the left, videos are at the bottom
 - c. Videos:



DBS Avalara Training Outline

Date Prepared: 10.07.09

Prepared By: J. Rick Lunt

1. Local Configuration Variables – 1 video
2. Global Configuration Variables – 4 videos