

AccountMate's Sales Tax Integration module provides sales tax automation where correct tax rates are determined based on the user's Nexus state and each state's Economic Nexus Laws, the customer's tax exemption type (if applicable), the customer's shipping addresses, and the types of products included in an order. Some products could be fully taxable, exempt from sales tax, or taxed at a reduced rate in various tax jurisdictions.

With this module, AccountMate provides complete flexibility in allowing users to decide whether they want to take the responsibility of maintaining the tax rates and choosing the sales tax code for each transaction or to enable the Sales Tax Integration module and allow either Avalara AvaTax or TaxJar to determine the correct tax rate. This module is applicable only to companies that are using the "United States" country tax and using "USD" as their home currency. This module integrates with AccountMate's Sales Order, Accounts Receivable, and Return Merchandise Authorization modules.

AccountMate 13 for SQL or Express Sales Tax Integration Module

Automated Sales Tax Calculation

With the Sales Tax Integration module, AccountMate users no longer have to take responsibility for maintaining the tax rates and choosing the sales tax code for each transaction themselves. Instead, users can have the system automatically determine the correct sales tax rates and amounts for their transactions. This saves you the time it takes to manually update the company's sales tax records. It also saves you money arising from costly sales tax calculation mistakes. When setting up Sales Tax Integration in AR Module Setup, users can choose between Avalara AvaTax and TaxJar to use as the sales tax calculation API.

The screenshot shows the 'Avalara Setup' dialog box with the following fields and options:

- Settings** | **Tax Code(s)** | **Nexus State(s)** | **Transaction Synchronization**
- Sales Tax Reporting**
 - Start Date: 07/14/23
 - End Date: //
 - Include transactions up to: 0 day(s) ago
 - Sync Now button
- Sync Schedule**
 - Frequency: Daily (dropdown)
 - Next Sync Date: 07/14/23
 - Last Sync Date: //
 - Recurs every: 1 day(s) (spinners)
 - Time (hh:mm): 00:00
 - Repeat every: (dropdown)
- Summary**
 - Transaction synchronization every day at 00:00.
- Last Successful Sync (UTC): None
- View Sync Activities button | View Unposted Trs button
- OK button | Cancel button

Setting Up Avalara AvaTax Sales Tax Integration Parameters

Import from Avalara AvaTax or TaxJar the Nexus State Information

Users have the option to import into AccountMate the Nexus state information that the users have selected on the Avalara AvaTax or TaxJar portal.

Assign Product Tax Codes or Categories to Inventory Items

Avalara Avatax or TaxJar provides the tax rules for product codes or categories to be used for certain products that are fully taxed, exempted from sales tax, or subject to reduced sales tax rates in some tax jurisdictions. With a single click of a button, users can regularly import from Avalara AvaTax or TaxJar the list of product tax codes or categories, which can be assigned to fully taxed items, tax-exempt items, or those items taxed at reduced rates.

Verify Customer's Tax Exemption Certificate Expiry Date

Users can configure AccountMate to check for any tax-exempt customer the tax exemption certificate expiration date or to ignore the expiration date, if needed. Expired certificate means the customer transaction will be considered non-exempt. This specific feature applies only to TaxJar sales tax integration.

Perform Immediate or Scheduled Transaction Synchronization

Users can set up the date range of transactions that must be uploaded to Avalara AvaTax or TaxJar for sales tax reporting and filing. They can also configure AccountMate to upload the transactions either immediately or on a preset schedule.

Up-to-date Sales Tax Reporting and Filing

The Avalara AvaTax or TaxJar portal provides easy viewing and tracking of each transaction's sales taxes that are owed to the state, county, city, and other tax jurisdictions. Avalara AvaTax or TaxJar simplifies sales tax filing by breaking down the sales taxes by state, county, city, and other specific tax jurisdictions. Users can readily make payments based on the sales tax forms prepared using Avalara AvaTax or TaxJar.

Integration with the Sales Order, Accounts Receivable, and Return Merchandise Authorization Modules

- Integration with the Sales Order, Accounts Receivable, and Return Merchandise Authorization modules provides more flexibility in allowing users to choose the tax rates to be used in calculating the sales taxes for applicable order and invoice transactions. Specific sales tax entity codes and specific sales tax codes will be used to identify the transactions that use Avalara AvaTax or TaxJar for sales tax calculation and those tax-exempt transactions.
- The Sales Tax Integration module provides the option for users to configure AccountMate to automatically call Avalara AvaTax or TaxJar to recalculate the sales taxes each time a change is made in the order or invoice transaction that affects the sales tax amount (e.g., add a line item; update the transaction details—order quantity, unit price, freight, etc.). Users can also opt anytime at their discretion to click a button to trigger AccountMate to send Avalara AvaTax or TaxJar a request to recalculate the sales taxes.

- When integrated with the Sales Order and Accounts Receivable modules, users can designate a customer or shipping address record as tax-exempt by choosing the proper tax exemption type, which becomes the default in the applicable Transaction functions. This configures AccountMate to not calculate sales taxes for that customer's transactions or those assigned with that shipping address record. This feature is helpful in processing transactions for wholesalers, resellers, and government entities that are typically exempted from sales taxes. This applies only to TaxJar sales tax integration.

Other Features

- Transaction Sync Log allows users to easily track the list of transactions that are synchronized with Avalara AvaTax or TaxJar and those new transactions that are yet to be uploaded to Avalara AvaTax or TaxJar.
- Avalara AvaTax or TaxJar sends email reminders about the sales tax return due dates, which helps users avoid missing the deadlines for sales tax forms filing and remittances.
- Ability to configure Avalara AvaTax or TaxJar to automatically file the state tax forms and remittances on due dates, which saves users from the hassle of sales tax reporting and filing processes.

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