



Auto Tax Calculator



User Manual

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Introduction

Auto Tax Calculator has been developed to automate the process of tax calculation in the CRM which will increase accuracy and save time. With this app, create customizable tax calculation by creating tax details information and grouping those details in tax schedules manually or else automate it with the help of AvaTax from Avalara. It automatically calculates taxes whenever a new line item for opportunity/quote/order/invoice is added.

Salient Features:

- Create specific Tax Schedules and Tax Details to calculate taxes
- Calculate tax for OOB Opportunity, Quote, Order and Invoice to meet your specific need
- Seamless integration with AvaTax from Avalara
- Tax calculations based on geolocation using AvaTax

Available for: Microsoft Dynamics 365 v8.2 and above, Power Apps.

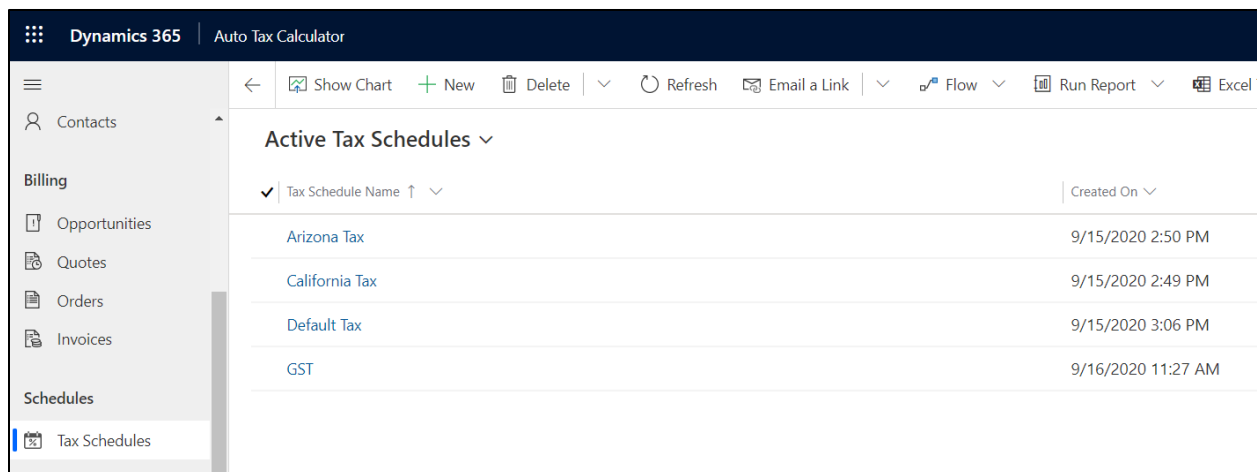
Deployment: On-Premises & Online.

Entities

Auto Tax Calculator enables users to calculate tax automatically for OOB entities like **Opportunity, Quote, Order** and **Invoice**. After the Auto Tax Calculator is imported into the CRM system, you will get two additional Custom entities – **Tax Schedules** and **Location**.

Tax Schedules

The Tax Schedule entity is used to create your Tax Schedules and assign the Tax Details to the schedule. A Tax Schedule is a group of Tax Details that can be applied to a Product or Customer.

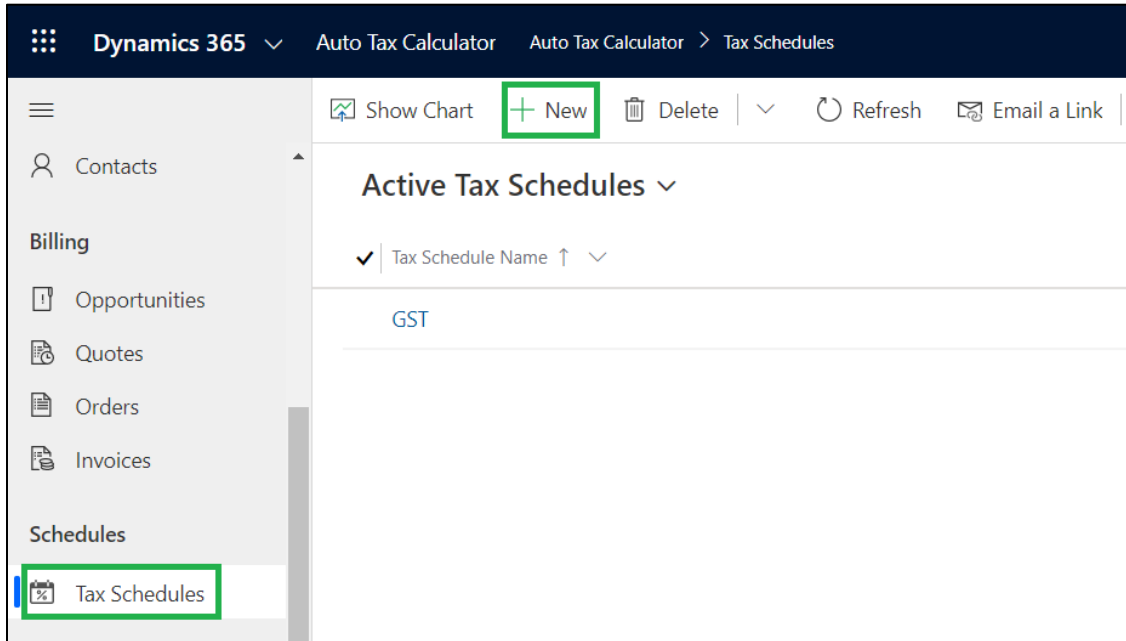


The screenshot shows the Dynamics 365 interface for the Auto Tax Calculator. The left sidebar contains navigation options: Contacts, Billing (Opportunities, Quotes, Orders, Invoices), and Schedules (Tax Schedules). The main area displays a table of Active Tax Schedules.

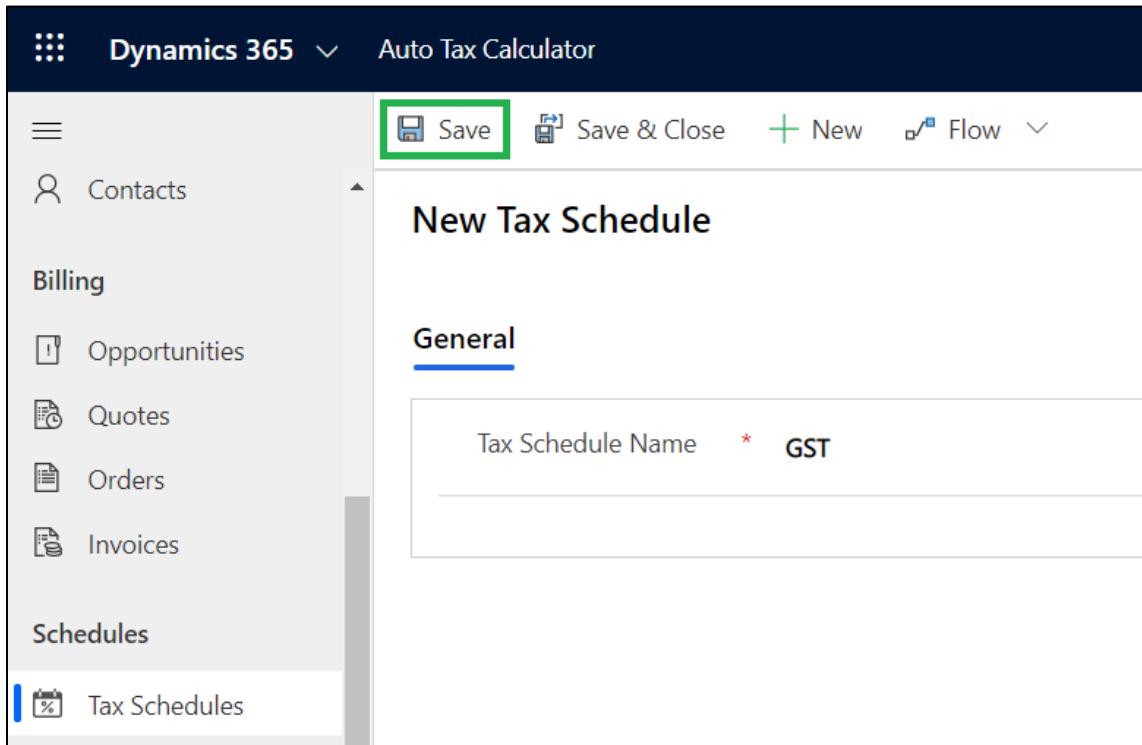
Active Tax Schedules	
Tax Schedule Name	Created On
Arizona Tax	9/15/2020 2:50 PM
California Tax	9/15/2020 2:49 PM
Default Tax	9/15/2020 3:06 PM
GST	9/16/2020 11:27 AM

To create a Tax Schedule follow the steps given below:

1. Navigate to **Dynamics 365** → **Auto Tax Calculator** → **Tax Schedules** → Click on **'+New'**.



2. Enter appropriate **Tax Schedule Name** → Click on **Save**.



3. Now click on **'Add Existing Tax Detail'** to create or add details of tax to the Tax Schedule.

GST
Tax Schedule

General Related

Tax Schedule Name * **GST**

✓ Tax Detail Name ↑	Tax Percent ↓	Tax Number ↓
No data available.		

4. Select existing **'Tax Detail'** → click on **'Add'**. OR

Dynamics 365 Auto Tax Calculator Auto Tax Calculator > Tax Schedules > GST

GST
Tax Schedule

General Related

Tax Schedule Name * **GST**

✓ Tax Detail Name ↑ Tax Percent ↓ Tax Number ↓

No data available.

Lookup Records

Select record

Look for Records

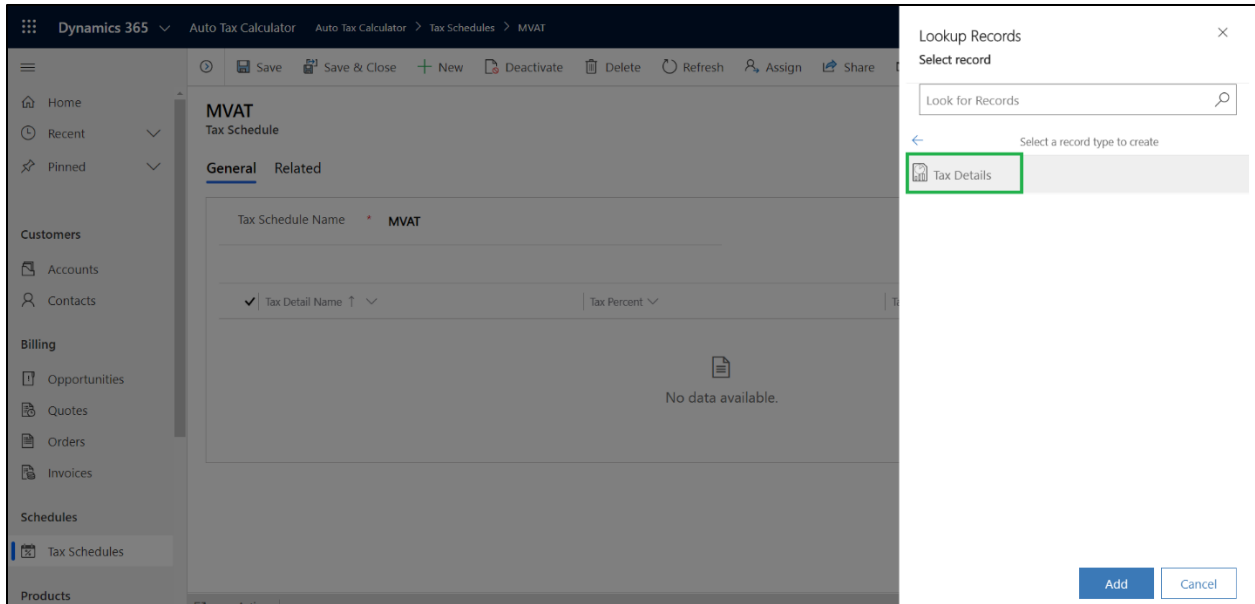
Recent records [All records](#)

- CGST
- SGST

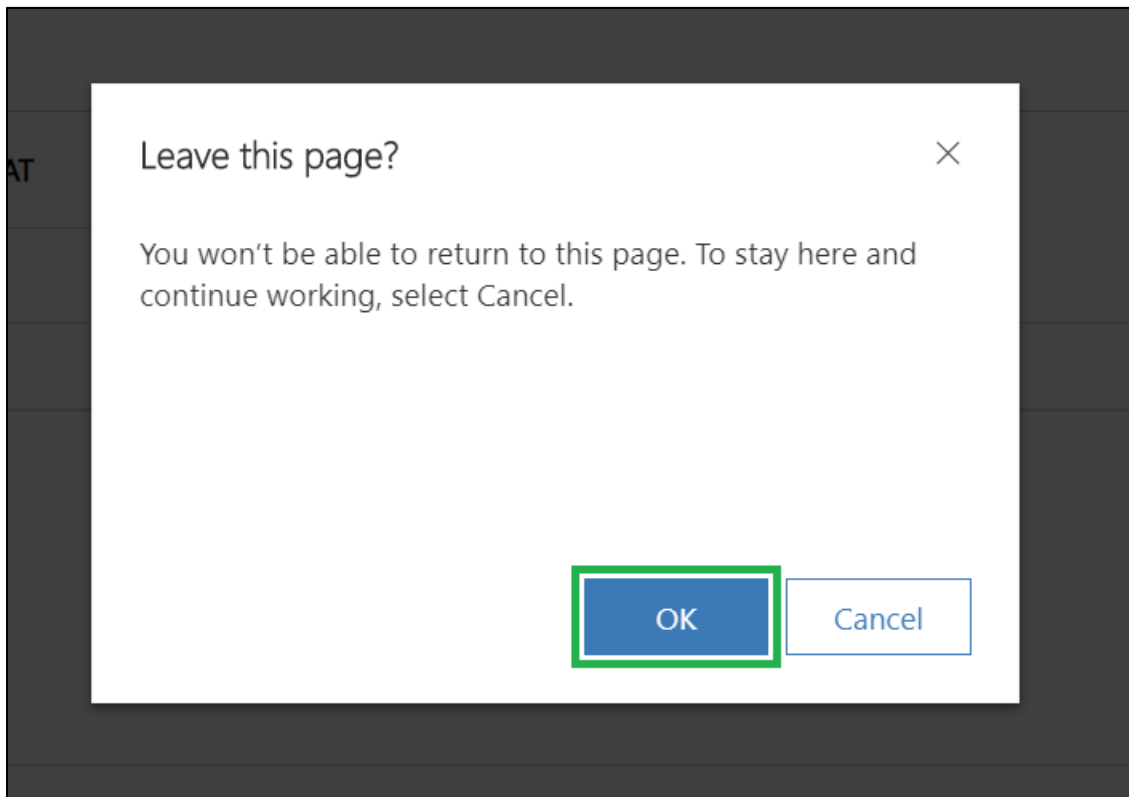
[+ New Record](#)

5. Click on **'+ New Record'** → Click on **'Tax Details'**.

Auto Tax Calculator – User Manual



6. The following dialog will appear. Here, click on **OK**.



7. Enter appropriate values to the respective fields – **Tax Detail Name, Tax Percent and Tax Number**
→ Click on **Save**.

Auto Tax Calculator – User Manual

New Tax Detail

General

Tax Detail Name *	CGST	Tax Number	CGST10
Tax Percent *	3.00000		

Dynamics 365 Auto Tax Calculator Auto Tax Calculator > Tax Schedules > GST

Save Save & Close New Deactivate Delete Refresh Assign Share Email a Link Flow

GST
Tax Schedule

General Related

Tax Schedule Name * GST

Add Existing Tax Detail

✓ Tax Detail Name ↑	Tax Percent ↓	Tax Number ↓
CGST	3.00000	CGST10
SGST	2.00000	SGST10

In the same way, to edit a Tax Schedule follow the steps given below:

1. Navigate to **Dynamics 365 → Auto Tax Calculator → Tax Schedules**.
2. Open the **Tax Schedule** you wish to edit.
3. Make the necessary changes.
4. Click on **Save**.

To Delete a Tax Schedule, follow the steps given below:

1. Navigate to **Dynamics 365 → Auto Tax Calculator → Tax Schedules**.
2. Mark the Tax Schedule to remove.
3. Click on **Delete**.

Tax Details

The Tax Detail entity is used to create details around your taxes such as percentage to calculate. The Tax Details are then assigned to Tax Schedules. You may have one Tax Detail assigned to multiple Tax Schedules and a Tax Schedule may contain multiple Tax Details.

To create a Tax Detail, follow the same steps as described in Tax Schedule.

1. Navigate to **Dynamics 365 → Auto Tax Calculator → Tax Schedules**.
2. Create a new Tax Schedule or open an existing Tax Schedule.
3. Click on **'Add Existing Tax Detail'** to create or add details of tax to the Tax Schedule.
4. Select existing **'Tax Detail'** → click on **'Add'** or Click on **'+ New Record'** to create new Tax Detail.
5. Next, click on **'Tax Details'**.
6. A dialog box will appear. Here, click on **OK**.
7. Enter the required fields and any other necessary fields.
 - a. **Tax Detail Name:** Descriptive name of the Tax Detail. This field is required.
 - b. **Tax Number:** A number or description to describe the Tax Detail.
 - c. **Tax Percent:** Defines the percent of tax to be calculated when this Tax Detail is used.
8. Click on **Save**.

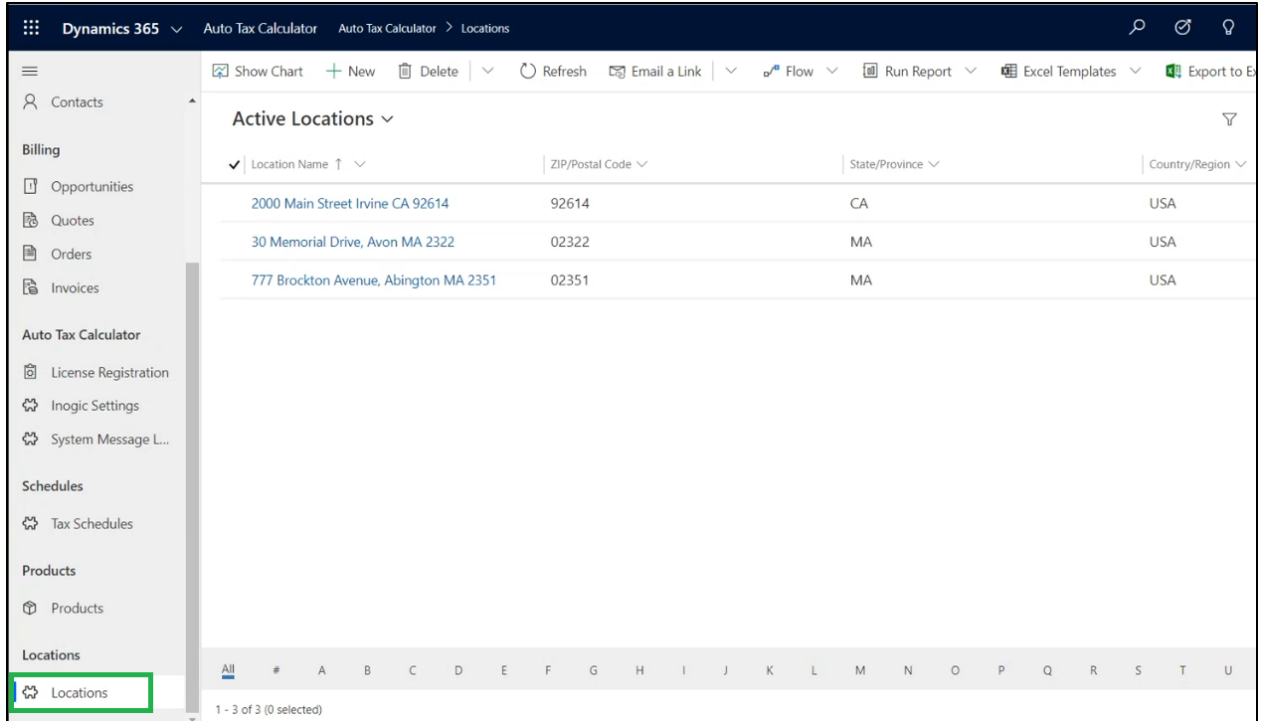
The screenshot shows a web interface for a 'California Tax' Tax Schedule. The 'General' tab is active. The 'Tax Schedule Name' is 'California Tax'. There is a table with columns for 'Tax Detail Name', 'Tax Percent', and 'Tax Number'. One row is visible with 'California tax', '7.10000', and 'CA100'. An 'Add Existing Tax Detail' button is also present.

Tax Detail Name	Tax Percent	Tax Number
California tax	7.10000	CA100

Location

The Location entity is used to list the addresses of different locations used for the purpose of business such as warehouses, offices, shops, etc.

Auto Tax Calculator – User Manual



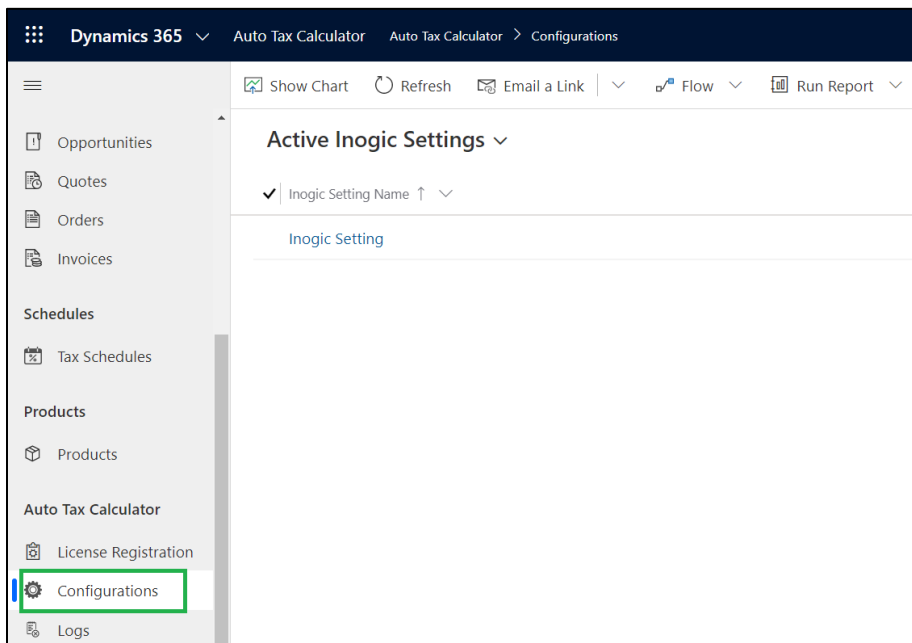
The screenshot shows the Dynamics 365 interface for the Auto Tax Calculator. The left-hand navigation pane is open, and the 'Locations' option is highlighted with a green box. The main content area displays a table titled 'Active Locations' with the following data:

Location Name	ZIP/Postal Code	State/Province	Country/Region
2000 Main Street Irvine CA 92614	92614	CA	USA
30 Memorial Drive, Avon MA 2322	02322	MA	USA
777 Brockton Avenue, Abington MA 2351	02351	MA	USA

At the bottom of the table, there is a status bar indicating '1 - 3 of 3 (0 selected)'.

Configurations

Once the license is activated for Auto Tax Calculator, a record named **'Inogic Setting'** is created under Configurations. The Inogic Setting entity stores the details about which type of tax calculation the user wants to use to calculate tax.



The screenshot shows the Dynamics 365 interface for the Auto Tax Calculator. The left-hand navigation pane is open, and the 'Configurations' option is highlighted with a green box. The main content area displays a table titled 'Active Inogic Settings' with the following data:

Inogic Setting Name
Inogic Setting

You will find the following fields in Inogic Settings:

- **Enable Tax:** This is a two option set field. It is a Global Setting to turn On/Off calculation of tax using Auto Tax Calculator. If 'Yes' then tax is calculated using Auto Tax Calculator.
- **Tax Calculation Type:** This is an optionset field with the following options – **Standard** and **Avalara**. Here, in '**Standard**' the tax calculations are done based on the Tax Schedules created in the system and in '**Avalara**' tax is calculated based on the tax rates defined in the Avalara system.

Standard

When the '**Standard**' option is selected for '**Tax Calculation Type**' in Inogic Settings, tax is calculated depending upon the tax schedules added in the setting or on the product, Customer or on product lines. Following fields need to be filled for Standard type of tax calculation.

- **Default Sales Tax Option for Products:** This optionset field has the following three options – **Non-Taxable, Taxable** and **Based on Customer**.
 - **Non-Taxable:** Here, tax will not be applicable on the value of products. There will be no tax calculated on the value of products.
 - **Taxable:** Here, tax will be applicable on the value of products. Tax will be calculated as per the rate defined in the **Tax Schedule**.
 - **Based on Customer:** Here, tax will be applicable on the basis of rates defined in the Tax Schedule for a particular customer.
- **Default Sales Tax Option for Write-Ins:** Here we can define how do we need to calculate tax on the Write-in products. This optionset field is similar to the above field with the same tax options - **Non-Taxable, Taxable** and **Based on Customer**.
- **Default Tax Schedule for Write-Ins:** This field is visible if Default Sales Tax Option for Write-ins is selected as **Taxable**. Select or create a Tax Schedule on the basis of which tax will be calculated for all the write-in products.

Inogic Setting

Configuration

General Related

Enable Tax	Yes		
<hr/>			
Tax Calculation Type *	Standard		
<hr/>			
Default Sales Tax Option for Products	Taxable	Default Sales Tax Option for Write-Ins	Taxable
<hr/>			
		Default Tax Schedule * for Write-Ins	Default Tax
<hr/>			

If tax calculation type used is **Standard** then, a tab named **'Tax Processing'** is added to the Product, Account, Contact and on Product lines form. If product already exists in the CRM before the installation of Auto Tax Calculator the user needs to manually add the Sales Tax Option.

The fields in 'Tax Processing' tab will be already populated on the basis of default values set in the Inogic Settings. But these values can be changed as per your requirement. You can set Default Sales Tax Option as – **Non-Taxable, Taxable or Based on Customer**.

IP


Product: iphone

Product

SUMMARY ADDITIONAL DETAILS **TAX PROCESSING** Notes Related

Default Sales Tax Option	Taxable		
<hr/>			
Sales Tax Schedule *	GST		
<hr/>			


If you choose 'Based on Customer' the 'Sales Tax Schedule' will no longer be available.

 **Product: iPhone**
Product


SUMMARY ADDITIONAL DETAILS TAX PROCESSING Notes Related

Default Sales Tax Option **Based on Customer**

Here, Auto Tax Calculator will automatically pick the Tax Schedule defined for that particular customer. Just like 'Products' entity, a tab named 'Tax Processing' is also added to the 'Account' and 'Contact' entity. Here, you can define the Tax Schedule for each customer as per your requirement.

 **Adventure Works**
Account

Summary Details Tax Processing Related

Sales Tax Schedule  **Arizona Tax**

Example:

Now, if you are to create an Opportunity and add products then tax will be calculated on the basis of Tax Schedule defined for that particular product.

iphone
Opportunity Line

General Tax Processing Related

Pricing

Pricing	Use Default
Price Per Unit	₹40,000.00
Volume Discount	₹0.00
Quantity	* 1.00000
Amount	₹40,000.00
Manual Discount	---
Tax	₹2,000.00
Extended Amount	₹42,000.00

Similarly, you will get 'Tax Processing' tab which will give you detailed information about the tax calculated. Here also you can change the 'Sales Tax Option' and 'Tax Schedule' as per your requirement.

iphone
Opportunity Line

General Tax Processing Related

Sales Tax Option **Taxable** Tax Code

Tax Schedule **GST**

Document Taxes Add Existing Docume...

Document Tax Name ↑ ↓	Tax Amount ↓	Tax Detail ↓
Interested in cell phones CGST	₹1,200.00	CGST
Interested in cell phones SGST	₹800.00	SGST

Avalara

Auto Tax Calculator can integrate with Avalara's AvaTax product. AvaTax calculations will be used when the Avalara License field in Inogic Settings is populated with the License Key provided by Avalara.

Inogic Setting

Configuration

General Related

Tax Calculation Type * Avalara	
Default Sales Tax Option for Products Taxable	Default Sales Tax Option for Write-Ins Taxable
Default Tax Code for Products P0000000	Default Tax Code for Write-Ins P0000000

Avalara Credential

Avalara License * XXXXXXXXXXXXXXXXXXXX	
Avalara Account * XXXXXXXXXX	
Avalara URL * https://test.avalara.com	

Avalara Information

Enable Avalara Address Validation No	Avalara Default Ship From Address Alternate Location
Avalara Commit On Post No	Location * 📍 2000 Main Street ✕
Avalara Company Code USCOMP... ▾	

You will find the following Avalara Auto Tax Calculator fields:

- **Avalara License:** The license key assigned by Avalara for their product.
- **Avalara Account:** Account ID assigned by Avalara when you register for their product.
- **Avalara URL:** URL to the Avalara Web Service used for Auto Tax Calculator.
- **Enable Avalara Address Validation:** Flag to turn Tax Address Validation on or off. This will be No unless you have registered for Avalara.

- **Avalara Default Ship From Address:** The default Ship From address of the customer to use in calculating taxes. Here, you will get three options – **Business Unit Bill to Address, Business Unit Ship to Address and Alternate Location.**
 - **Business Unit Bill to Address** – If this option is selected than the Ship from Address is picked from the Business Unit Bill to Address of the Logged in User.
 - **Business Unit Ship to Address** – If this option is selected than the Ship from Address is picked from the Business Unit Ship to Address of the Logged in User.
 - **Alternate Location** – If this option is selected than you can select a record from the Location entity.
- **Avalara Commit on Post:** When using Avalara, the settings inform the systems if the user would like to commit a Tax Document at the same time they Post it.
- **Avalara Company Code:** Identifies the company that helps Avalara access your company's tax profile.

Once all the fields are duly entered, click on **Save** to complete the Avalara integration.

If Avalara is set as tax calculation type then on Account/Contact under Tax Processing tab additional fields are seen.

- **Business Identification Number:** Here, mention the unique identification number given to the business organization.
- **Sales Tax Exemption Number:** Here, mention the unique number that will give exemption from Sales Tax.
- **Customer Usage Type:** Select any option from the drop-down that defines the organization. For example - Federal Government, Local Government, Charitable Organisation, etc. *(This field is used while calculating tax with 'Avalara' integration).*

Example:

Now, if you are to create an Invoice for a particular product, then with '**AvaTax**' integration all the taxes will be calculated on the basis of tax rates defined in Avalara for that particular product. Now on Invoice the Customer selected is **A Datum Corporation**. It's address is 2000 Main Street, Irvine, CA 92614. Depending upon the address the tax is calculated.

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iphone
Invoice Line

General | Delivery | Address | **Tax Processing** | Related

Pricing

Pricing	Use Default
🔒 Price Per Unit	₹40,000.00
🔒 Volume Discount	₹0.00
Quantity	* 1.00000
🔒 Amount	₹40,000.00
Manual Discount	---
🔒 Tax	₹3,100.00
🔒 Extended Amount	₹43,100.00

And you will get the bifurcation of the taxes calculated in the 'Tax Processing' tab.

iphone
Invoice Line

General | Delivery | Address | **Tax Processing** | Related

🔒 Avalara Doc Status	Saved	🔒 Avalara Cancel Code	---
🔒 Avalara Is Reconciled	No	🔒 Avalara Is Locked	No
🔒 Avalara Adjustment Reason	---	🔒 Avalara Adjustment Description	---





Document Taxes 📄 Add Existing Docume... 🔄 Refresh ⋮

✓ Document Tax Name ↑ ↓	Tax Amount ↓	Tax Detail ↓
Cell Invoice CALIFORNIA (STA)	₹2,400.00	CALIFORNIA (STA)
Cell Invoice ORANGE (CTY)	₹100.00	ORANGE (CTY)
Cell Invoice ORANGE CO LOCAL TAX SL (STJ)	₹400.00	ORANGE CO LOCAL TAX SL (STJ)
Cell Invoice ORANGE COUNTY DISTRICT TAX SP (STJ)	₹200.00	ORANGE COUNTY DISTRICT TAX SP (STJ)

The same bifurcation can be seen in Avalara also.

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JURISDICTION	TAX NAME	ADDRESS	RATE	EXEMPT	NON-TAXABLE	TAXABLE	TAXES/FEES
California State	CA STATE TAX	Origin	0.060000	0.00	0.00	40,000.00	2,400.00
Orange County	CA COUNTY TAX	Origin	0.002500	0.00	0.00	40,000.00	100.00
Orange County District Tax Sp Special	CA SPECIAL TAX	Destination	0.005000	0.00	0.00	40,000.00	200.00
Orange Co Local Tax SI Special	CA SPECIAL TAX	Origin	0.010000	0.00	0.00	40,000.00	400.00
Total			0.077500				3,100.00

 Avalara Account  CertExpress  Avalara Help Center  Avalara.com

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