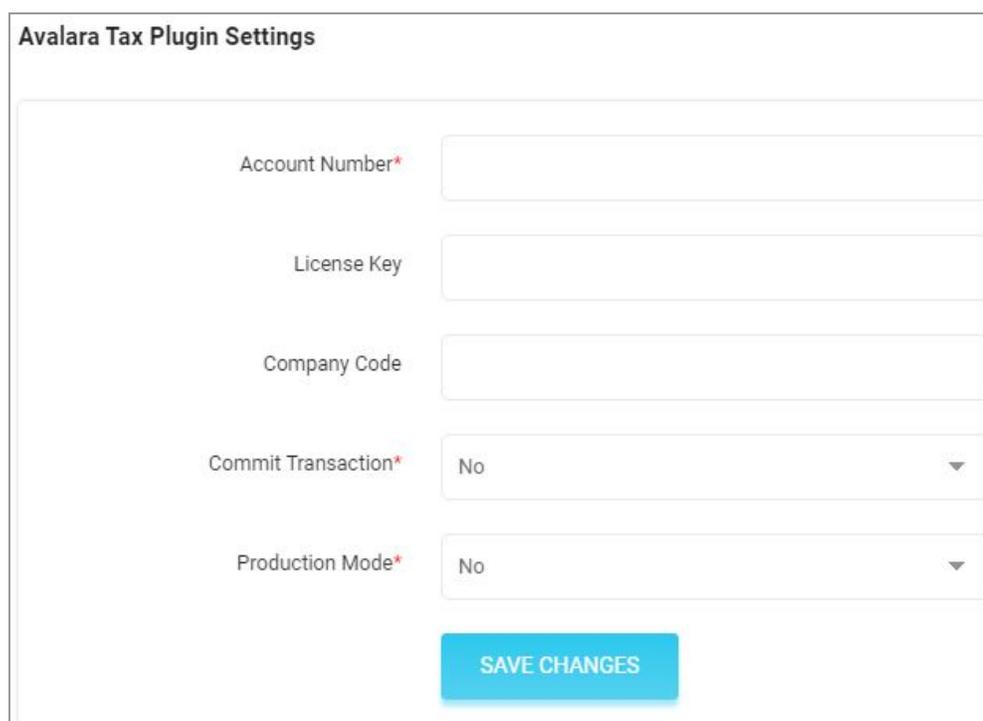


TaxJar & Avalara Plugins API Keys Setup Guide

There are two tax-service plugins embedded in the Yo!kart system. The admin can configure them from **System Settings > Plugins > Tax Services**.

1. Avalara Tax

The 'Avalara Tax Plugin Settings' pop-up box will open as shown in figure 1.1 in which the admin must enter the required keys to ensure that this plugin works correctly.



Avalara Tax Plugin Settings

Account Number*

License Key

Company Code

Commit Transaction*

Production Mode*

SAVE CHANGES

Fig. 1.1: Avalara Tax Plugin Settings (Admin-end)

The steps to be followed are:

NB: Nota Bene [Note Well] (N.B., N.b., n.b or NB, Nb, nb) is a Latin phrase, meaning 'note well' or 'take notice' or 'please note'. Asterisk (*) next to a form control's label indicates it as 'required'.

1. Visit <https://developer.avalara.com/> which will redirect the admin to **Avalara Developer** page as shown in figure 1.2.

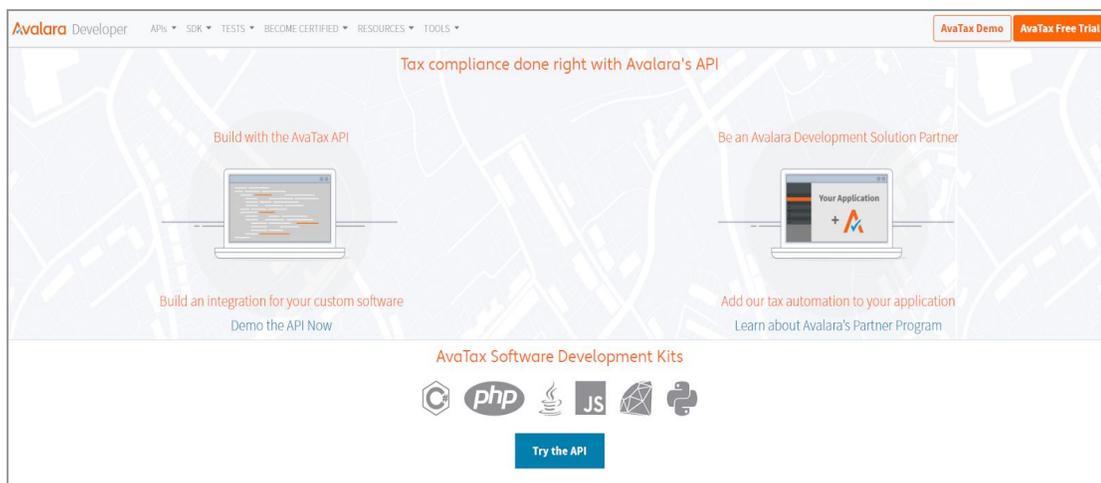


Fig. 1.2: Avalara Developer Page

2. The admin must **Sign In** if they have not been registered yet. If already registered, the admin must **LogIn** by filling their credentials.
3. Once logged in, the admin will be redirected to homepage as shown in figure 1.3.

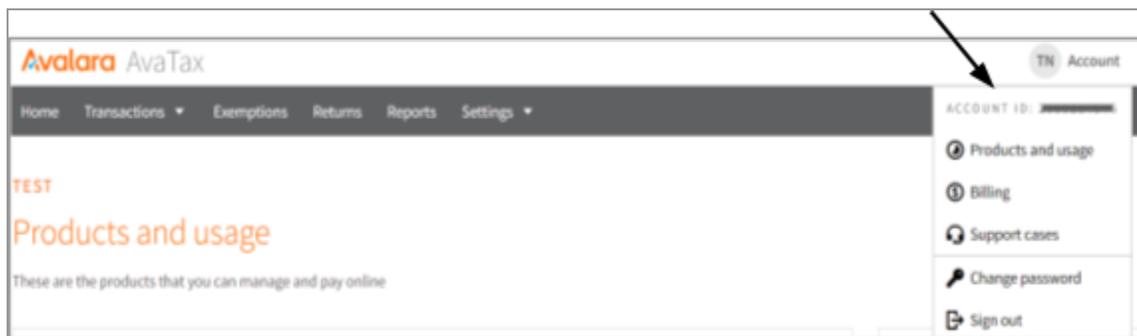


Fig. 1.3: 'Account' on Homepage

When clicking on the '**Account**' button provided on the top-right corner of this page, a menu will appear which displays the '**Account ID**' as marked in figure 1.3.

NB: Nota Bene [Note Well] (N.B., N.b., n.b or NB, Nb, nb) is a Latin phrase, meaning 'note well' or 'take notice' or 'please note'. Asterisk (*) next to a form control's label indicates it as 'required'.

The admin must copy this Id and paste it in the '**Account Number**' field in their settings as shown in [figure 1.1](#).

4. To proceed further, the admin must return back to Avalara and click on the '**Settings**' tab provided on the top-header navigation bar.

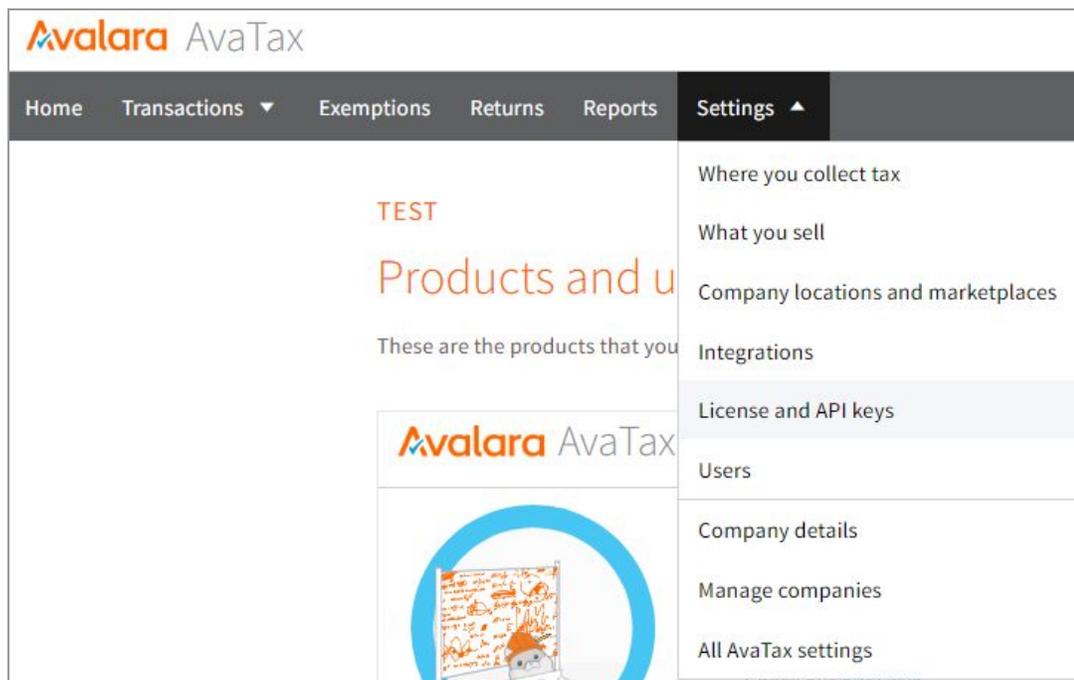


Fig. 1.4: 'Settings' tab

A drop-down list will open as shown in figure 1.4 from which the admin must click on '**License and API keys**'.

5. The admin will be redirected to the '**Integrations and AvaTax License Key**' page as shown in figure 1.5.

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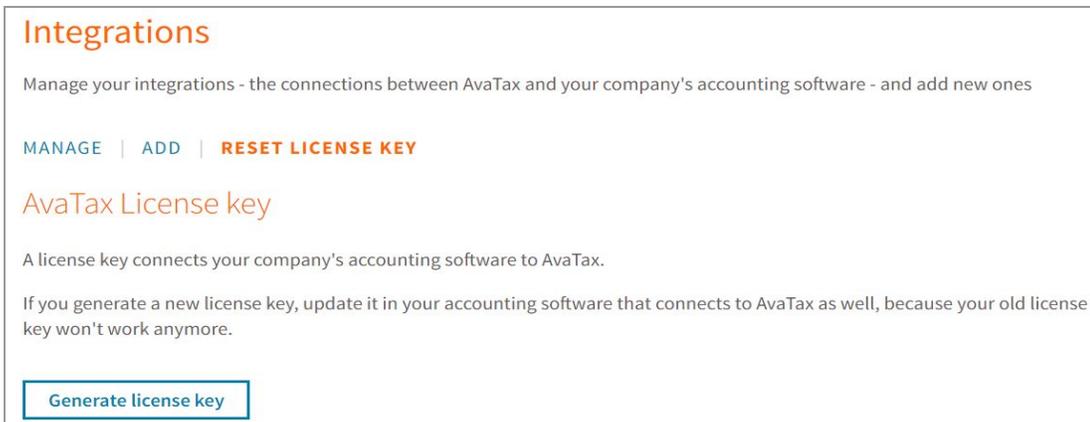


Fig. 1.5: 'Integrations and AvaTax License Key' Page

The admin must click on the '**Generate License Key**' button provided under the '**AvaTax License Key**' section.

6. A new section will be displayed which will provide the '**License Key**' for the respective account as shown in figure 1.6.

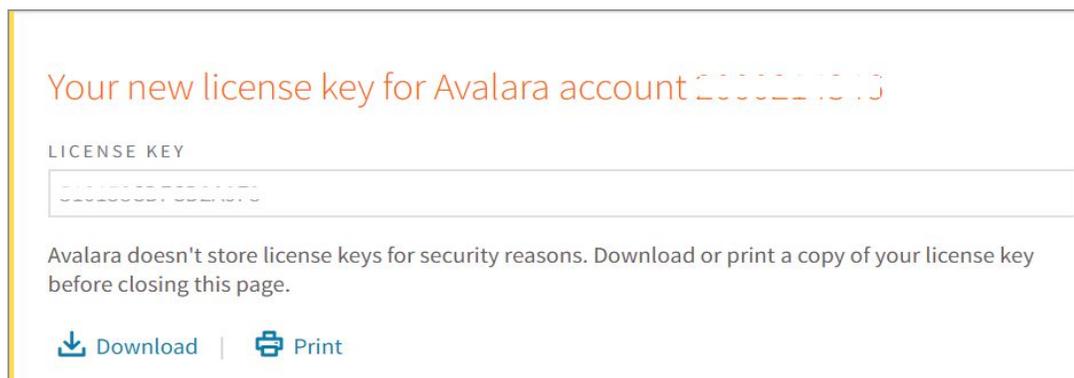


Fig. 1.6: License Key

The admin can either directly copy the '**License Key**' or download it on their PC by clicking on the '**Download**' button provided below this section. The downloaded .txt file will display both, '**Account Id**' and '**License Key**'. The admin must paste the '**License Key**' in the respective input field provided in their settings as shown in [figure 1.1](#).

NB: Nota Bene [Note Well] (N.B., N.b., n.b or NB, Nb, nb) is a Latin phrase, meaning 'note well' or 'take notice' or 'please note'. Asterisk (*) next to a form control's label indicates it as 'required'.

- Admin must then return to their Avalara account and once again click on the 'Settings' tab provided on the top-header navigation bar. From the drop-down list, the admin must click on 'Company Details' as marked in figure 1.7.

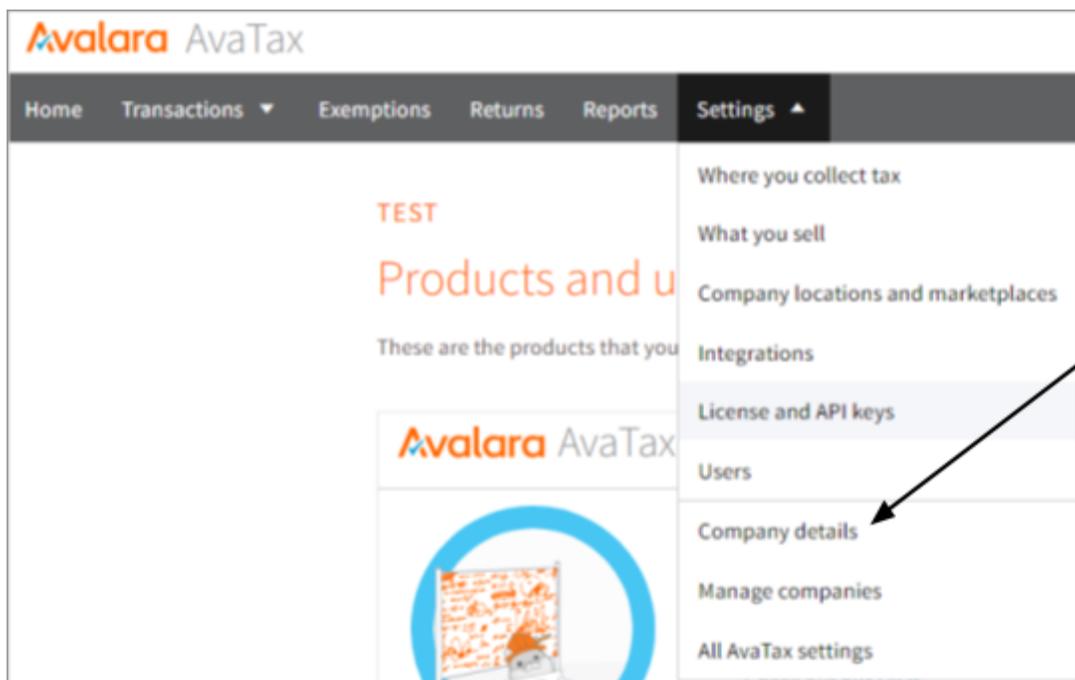


Fig. 1.7: 'Company Details' under 'Settings'

- The admin will be redirected to the Company Details page as shown in figure 1.8.

NB: Nota Bene [Note Well] (N.B., N.b., n.b or NB, Nb, nb) is a Latin phrase, meaning 'note well' or 'take notice' or 'please note'. Asterisk (*) next to a form control's label indicates it as 'required'.

Company: test

COMPANY LOCATIONS [Manage company locations](#)

COMPANY NAME * ?

BUSINESS ID (BIN) ?

TAXPAYER ID (EIN) ?

COMPANY CODE * ?

Changes made here may require you to update the company code in your accounting software integration as well. [Check how your accounting software handles company codes](#) before editing this code here in AvaTax.

Set test as the default company?

The default company is automatically selected when you log in

Default company

Do you want this company to be active?

If the company is active, AvaTax calculates tax on its transactions. Test company transactions have tax calculated as well, but aren't included in reports, returns, and accounts summaries.

STATUS

Active

Test company Tax returns and tax-return reports are not available for test companies

Inactive AvaTax will not calculate tax

Fig. 1.8: 'Company Details' Page

This page displays the '**Company Code**' as marked in figure 1.8 which is the default code provided from Avalara. The admin can make changes in this form but must click on the '**Save**' button to update the changes successfully. Additionally, if the '**Company Code**' is changed in Avalara settings, the admin

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must update the similar company code in their plugin settings as shown in [figure 1.1](#).

9. **Commit Transaction:** Admin can select 'Yes' or 'No' from the drop-down list. The purpose of committing a transaction is to indicate that the transaction is ready to be reported to a tax authority.
 - An **Uncommitted transaction (Selecting 'No')** simply means it will not be remitted for you, if we file your returns, and it will not reflect in your reports. Typically uncommitted transactions are used for unfinished transactions, such as quotes or sales orders.
 - A **Committed transaction (Selecting 'Yes')** will be included in the Admin reports and the returns Avalara files for your company. Committed transactions are viewed as finalized or posted transactions.

For further information, the admin can read information provided on: <https://developer.avalara.com/avatax/dev-guide/reconciliation/committing-a-transaction/>

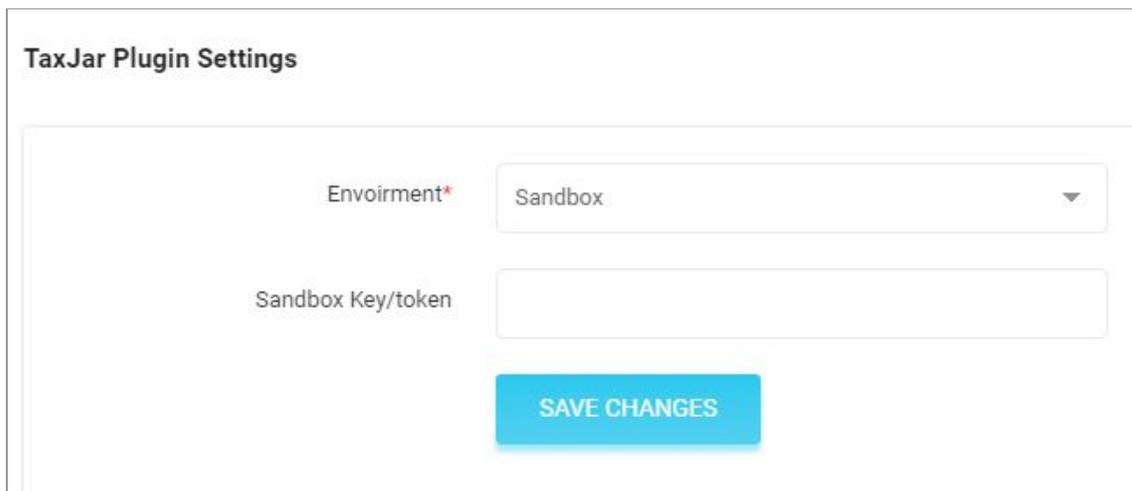
10. **Production Mode:** The '**Production**' account is used for tax calculation and compliance reporting for the **live financial data**, so one might not want to make configuration changes without testing them first. The admin must select '**Yes**' for Production mode when going live.

For **testing** purposes, the admin must select '**No**' for 'Production Mode' and create a '**Sandbox Account**' in Avalara. The account number and keys for both the accounts are different however, the steps to be followed are the same. For more information, the admin can visit https://help.avalara.com/Avalara_AvaTax_Update/Understanding_AvaTax_sandbox_accounts.

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2. TaxJar

Clicking on the Settings icon will open the 'TaxJar Plugin Settings' pop-up box will open as shown in figure 2.1 below.



The screenshot shows a 'TaxJar Plugin Settings' dialog box. It has a title bar with the text 'TaxJar Plugin Settings'. Inside the dialog, there are two input fields. The first is labeled 'Envoirement*' and has a dropdown menu with 'Sandbox' selected. The second is labeled 'Sandbox Key/token' and is an empty text input field. Below these fields is a blue button with the text 'SAVE CHANGES'.

Fig. 2.1: TaxJar Plugin Settings

The admin must select the type of **Environment** to be used currently for their website. If under development, the admin must use '**Sandbox**' mode. To switch on to the live mode the admin must use '**Production**' mode.

Please note that the steps to be followed to generate keys are the same in both cases.

1. Go to <https://www.taxjar.com/> and follow the 3-steps registration process to signup on TaxJar.
2. In the first step, enter the **Business Name** and select the estimated average number of orders that are processed each month.

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Asterisk (*) next to a form control's label indicates it as 'required'.

Let's get started with TaxJar

A few quick questions to learn about your business so we can tailor your experience.

Business name *

Business phone number (optional)

On average, how many orders do you process each month? *

Between 0 and 200

Between 201 and 500

Between 501 and 1,000

Between 1,001 and 5,000

Between 5,001 and 10,000

More than 10,000

Save & continue

Fig. 2.2: Get Started with TaxJar

Click on **'Save & Continue'** to proceed onto the next step.

3. In the second step, select the **'TaxJar API (For Developers)'** option and click on the **'Save & Continue'** button to proceed further.

NB: Nota Bene [Note Well] (N.B., N.b., n.b or NB, Nb, nb) is a Latin phrase, meaning 'note well' or 'take notice' or 'please note'. Asterisk (*) next to a form control's label indicates it as 'required'.

How would you like to import your data?

Select all of the sources that apply to you. If you're still setting up your store, select what you plan to use, and don't worry, you can always update this later.

Store Integration
One-click integrations with top online marketplaces

     **PayPal**  **Woo**  **stripe** and more

 **TaxJar API (For Developers)**
Integrate TaxJar directly into your site or shopping cart

 **CSV Import**
Simply upload any CSV and map it to Taxjar defaults

Or, you can set this up later

 **Skip this step (not recommended)**
Importing data ensures you get the most out of your trial

Save & continue

Fig. 2.2: Get Started with TaxJar

4. The admin will be redirected to the TaxJar homepage as shown in figure 2.3. Click on the **'Account'** button which will open a drop-down list. Click on the **'TaxJar API'** button.

NB: Nota Bene [Note Well] (N.B., N.b., n.b or NB, Nb, nb) is a Latin phrase, meaning 'note well' or 'take notice' or 'please note'. Asterisk (*) next to a form control's label indicates it as 'required'.

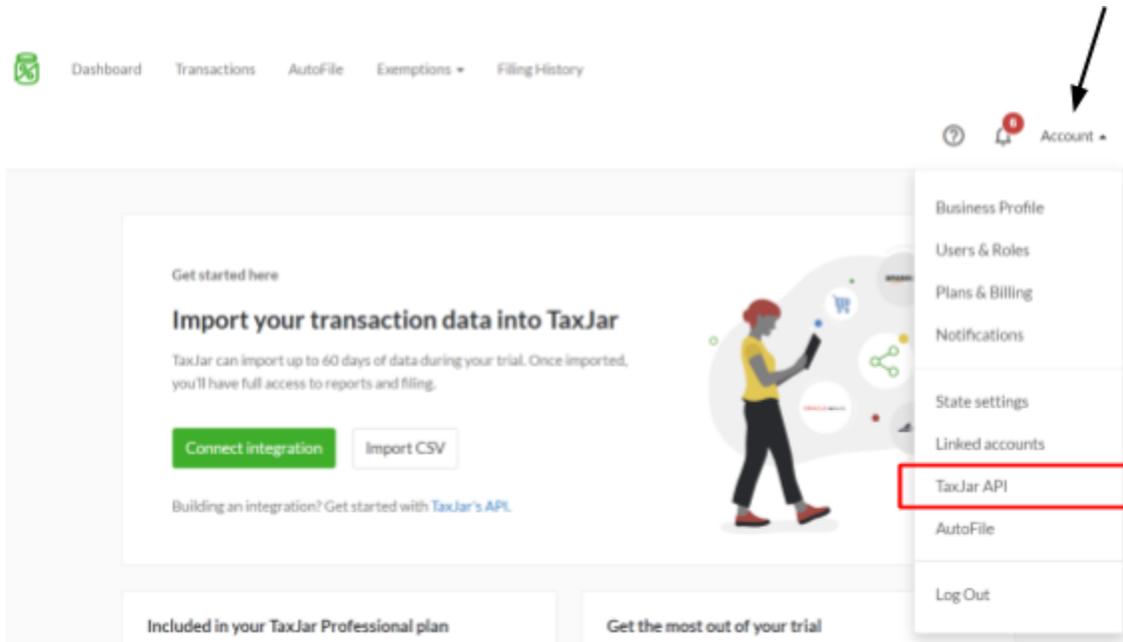


Fig. 2.3: Get Started with TaxJar

- Admin will be redirected to the **TaxJar API Token** page as shown in the figure 2.4 below.

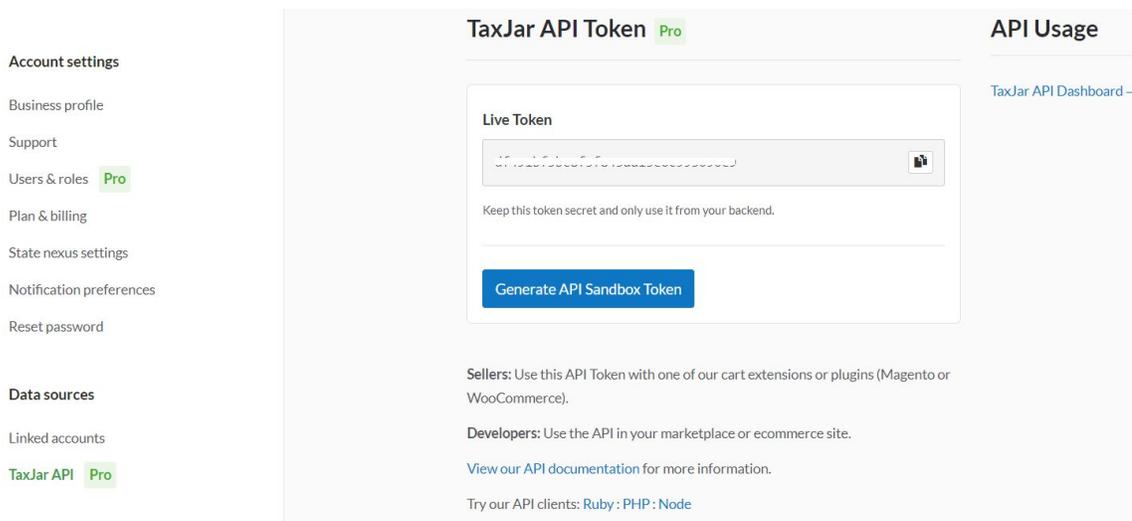


Fig. 2.4: TaxJar API Token

NB: Nota Bene [Note Well] (N.B., N.b., n.b or NB, Nb, nb) is a Latin phrase, meaning 'note well' or 'take notice' or 'please note'. Asterisk (*) next to a form control's label indicates it as 'required'.

This page displays the '**Live Token**' key which needs to be configured by the admin in their settings ([Figure 2.1](#)).

6. The admin can generate the **Sandbox token** by clicking on the '**Generate API Sandbox Token**' button provided on this page.

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NB: Nota Bene [Note Well] (N.B., N.b., n.b or NB, Nb, nb) is a Latin phrase, meaning 'note well' or 'take notice' or 'please note'.

Asterisk (*) next to a form control's label indicates it as 'required'.