



QAD Enterprise Applications
Enterprise Edition

Installation Guide **QAD AvaTax**

70-3304-3.0
QAD AvaTax 3.0
March 2014

This document contains proprietary information that is protected by copyright and other intellectual property laws. No part of this document may be reproduced, translated, or modified without the prior written consent of QAD Inc. The information contained in this document is subject to change without notice.

QAD Inc. provides this material as is and makes no warranty of any kind, expressed or implied, including, but not limited to, the implied warranties of merchantability and fitness for a particular purpose. QAD Inc. shall not be liable for errors contained herein or for incidental or consequential damages (including lost profits) in connection with the furnishing, performance, or use of this material whether based on warranty, contract, or other legal theory.

QAD and MFG/PRO are registered trademarks of QAD Inc. The QAD logo is a trademark of QAD Inc.

Designations used by other companies to distinguish their products are often claimed as trademarks. In this document, the product names appear in initial capital or all capital letters. Contact the appropriate companies for more information regarding trademarks and registration.

Copyright ©2014 by QAD Inc.

AVATAX_IG_v030.pdf/yimg/ofs

QAD Inc.

100 Innovation Place
Santa Barbara, California 93108
Phone (805) 566-6000
<http://www.qad.com>

Contents

- Change Summaryv**

- Chapter 1 Installing the AvaTax Connector1**
 - Overview2
 - Planning the Installation2
 - System Requirements2
 - Installation2
 - Install Certificate into OpenEdge Environment2
 - Program Compilation3
 - Add Menu Option for the AvaTax Connector Configuration Utility3
 - Configure the QAD AvaTax Connector3
 - Tax Configuration5

- Product Information Resources7**

AvaTax Install Guide Change Summary

The following table summarizes significant differences between this document and previous versions.

| Date/Version | Description | Reference |
|---------------------|--------------------------------------|------------------|
| March 2014/3.0 | Initial publication of this document | -- |

Installing the AvaTax Connector

This chapter discusses the following topics:

Overview 2

Describes the AvaTax Connector.

Planning the Installation 2

Lists prerequisites before performing the installation.

System Requirements 2

Lists the system requirements for installing the AvaTax Connector.

Installation 2

Describes where to install the package.

Install Certificate into OpenEdge Environment 2

Describes how to install the certificate in the OpenEdge environment.

Program Compilation 3

Describes how to compile the program.

Add Menu Option for the AvaTax Connector Configuration Utility 3

Add the txavconf.p program as a menu option.

Configure the QAD AvaTax Connector 3

Describes how to complete the AvaTax Configuration screen.

Tax Configuration 5

Describes prerequisites for successfully executing transactions.

Overview

The QAD AvaTax Connector for EE provides integration between Avalara AvaTax sales and use tax services and the QAD Enterprise Edition 2014 Enterprise Suite. The connector sends required information to the AvaTax service and retrieves tax calculation results, which are used to update QAD Global Tax Management data. Additionally, the connector saves Sales Invoice data to AvaTax for subsequent tax reporting and form generation within the AvaTax application.

Planning the Installation

The QAD AvaTax Connector for QAD 2014 Enterprise Edition is provisioned as a package and is obtained from QAD Services. Since the AvaTax service is a cloud-based application, the system where you are installing the connector requires Internet access.

System Requirements

The QAD AvaTax Connector for QAD 2014 Enterprise Edition requires the following:

- A complete QAD 2014 Enterprise Edition installation
- A QAD AvaTax Connector package for QAD 2014 Enterprise Edition
- 520 MB to 1.02 GB of disk space (20 MB for the connector and 500 MB to 1 GB for the resulting log files)
- HTTP requests via SSL access for the system on which the QAD AvaTax Connector is installed (the AvaTax Service is deployed as a Web Service)

Installation

Extract the package to the location under which the AvaTax Connector directory is located.

Install Certificate into OpenEdge Environment

An OpenEdge keystore certificate is required to support the secured connection between the connector and the AvaTax service. Avalara provides Development and Production environment support and each has a separate URL for the corresponding environments.

Most installations use the Production URL; the Development URL is also included for reference.

<https://development.avalara.net/tax/taxsvc.wsdl>

<https://avatax.avalara.net/tax/taxsvc.wsdl>

Remember that you can configure a “Company” within AvaTax Production Environments specifically for testing before live use of the service. The Development Environment is only used for unusual cases involving major development or customization. It is important to use the URL that corresponds to the Avalara account type.

To install the certificate, use the following steps:

- 1 Using the appropriate URL, open the WSDL file with a browser.
- 2 Go to properties for the WSDL, and navigate to Certificate Information.
- 3 Use the browse option to save the certificate to a .CER file with the Base-64 encoded x.509 format. You can also use a .CRT file.
- 4 Copy this file to the server where OpenEdge and the connector are installed.
- 5 Use the following command to install the certificate into the OpenEdge environment:


```
$DLC/bin/certutil -import <Certificate File Name>
```
- 6 A message appears indicating that the certificate was successfully installed.

Program Compilation

Programs are compiled using QDT.

It is important that the `src` and `src/us` locations within the connector directory are inserted at the beginning of the compile `PROPATH`. You can set the target directory to the standard EE destination directory. Or you can set it to compile into the AvaTax directory, such as `.. /avatax/us`. However, if the code is compiled into a target directory other than the standard EE destination, the `PROPATH` for all client connections is altered to include the AvaTax target directory, and the AvaTax Target directory must be first in the client `PROPATH`.

Check the QDT compile log to ensure that the AvaTax source location is used for the compile of all of the programs and include files.

Find the `us/co` directory that the compile created. Within that directory, move the `com` directory up so that the directory is in the client `PROPATH` (usually two levels up, one up from `co`, and two up from `us`).

Add Menu Option for the AvaTax Connector Configuration Utility

You must add the `txavconf.p` program as a menu option. In Enterprise Edition, create the menu option 29.9 AvaTax Connector.

Configure the QAD AvaTax Connector

Open the AvaTax Connector (29.9, `txavconf.p`) and make the following entries and selections:

Fig. 2
AvaTax Configuration

AvaTax Configuration

Go To Actions Copy Print Preview

AvaTax Codes

Account Number:

License Key:

Explicit Address Validation:

Which URL:

Report by Domain or Entity:

Tax URL:

Address URL:

Debug:

Log location:

Adapter Profile: 5.7.0:QAD2012,EE:AvaTax Adapter,1.12.0

AvaTax Version: 13.1.0.15

Back Next

Account Number. Enter the AvaTax Account Number.

License Key. Enter the AvaTax License Key.

Which URL. Select Production or Development, depending on which URL you used in the previous step for Certificate Installation.

Log Location. Use the location of the logs directory within the AvaTax installation directory. If you used a different location, copy the WSDL files from the `avatax/logs` directory to whatever directory is specified. Also, make sure that the log file directory specified is write-accessible to Enterprise Edition users.

Debug. Selecting the Debug flag enables detailed logging to assist with debugging.

Verify Address. Indicate whether AvaTax verifies the addresses submitted for tax transactions. If Yes, AvaTax checks North American addresses. A general error message appears in the QAD screens, indicating an address failure.

Use Domain or Entity. Indicate whether the Company Profile setup in AvaTax corresponds to a Domain ID or an Entity ID. Discuss the question of Entity versus Domain with AvaTax and a financial expert before set up. The Domain or Entity ID must correspond to the Company Profile ID in AvaTax.

Adapter Profile. This field displays the specific profile for this connector.

AvaTax Version. This field displays the specific version of AvaTax for which the connector was designed. The display shows the connector and AvaTax service versions. The AvaTax

service version changes regularly. A difference between the connector and AvaTax service version does not necessarily mean that you have to upgrade the connector or take any other action.

The lower frame of the QAD AvaTax Configuration screen displays the connection status and the AvaTax Service version that responded.

Fig. 3
AvaTax Results



The words “Ping Results: Success” mean that the connector installation is finished.

Tax Configuration

Before you can successfully execute transactions, you must configure the QAD Enterprise Edition Global Tax Module and the AvaTax Console. Failure to do so can result in several error messages. Refer to *User Guide: QAD AvaTax Interface* for configuration instructions.

Product Information Resources

QAD offers a number of online resources to help you get more information about using QAD products.

[QAD Forums \(community.qad.com\)](https://community.qad.com)

Ask questions and share information with other members of the user community, including QAD experts.

[QAD Knowledgebase \(knowledgebase.qad.com\)*](https://knowledgebase.qad.com)

Search for answers, tips, or solutions related to any QAD product or topic.

[QAD Document Library \(www.qad.com/documentlibrary\)](https://www.qad.com/documentlibrary)

Get browser-based access to user guides, release notes, training guides, and so on; use powerful search features to find the document you want, then read online, or download and print PDF.

[QAD Learning Center \(learning.qad.com\)*](https://learning.qad.com)

Visit QAD's one-stop destination for all courses and training materials.

*Log-in required

