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Avalara AvaTax for WHMCS (wbAvaTax)

Description

Avalara AvaTax for WHMCS is the all-in-one Address Verification and Tax Calculation module for WHMCS. With Avalara AvaTax for WHMCS your tax calculations are handled automatically, processed uniquely for each order to ensure that your customers are taxed the correct amount based on their region. All transactions are maintained within the Avalara system which are then available for accounting and tax preparation. With Avalara's Address Verifications service you will always know the accuracy of your customers address information, helping to prevent any future billing and shipping issues. *Charge the right sales tax, right away.*

Technical Support

If you experience any problems with the installation or usage of this modules please visit our website <https://billing.holodyn.com/> and contact us by phone or support ticket. If you are not comfortable making changes to your WHMCS installation our team can perform the installation for you. Questions regarding specific tax relationships or Nexus configurations should be directed to your Avalara account representative.

Resource Links

Installation Technical Support

<https://billing.holodyn.com/>

Installation Downloads & Resources

<http://billing.holodyn.com/downloads/12/wbAvaTax>

Avalara AvaTax Integration Home

https://help.avalara.com/004_AvaTax_Integrations/WHMCS

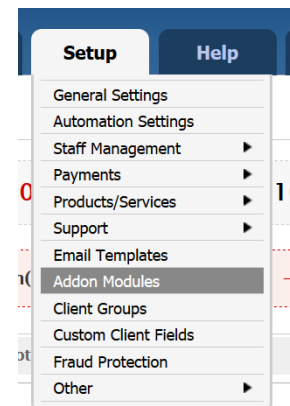
Installation

File Installation / Upgrade

Download the latest copy of the Addon before installation. Extract the addon package into a temporary folder on your computer, then upload the contents of the “installation” folder into your root WHMCS installation folder. The installation package will not overwrite any of the standard WHMCS files. To perform upgrades you will follow the same procedure, overwriting the previous installation with the new package files. The software will automatically detect the upgrade upon first run.

Activating the Addon

1. Navigate to your WHMCS Addon Modules Setup page.
[Setup >> Addon Module]
2. If your files were uploaded correctly you will now see a record for “Avalara AvaTax.”
3. This should have a green “Activate” button. Press this so that you may begin configuring your addon.



easy way to communicate with all the staff via your WHMCS system

» Avalara AvaTax

Automatically Calculate Tax Rates using Avalara AvaTax.
Learn more at billing.holodyn.com

1.0.0

Holodyn, Inc.

Activate

Deactivate

Configure

» whTeamPro Project Manager

Module License Key

The Avalara for WHMCS module requires an application license key to operate. The key is free to obtain from the Services area of your account at <https://billing.holodyn.com/>. Each domain will require a different service instance which can be setup at no cost. To register or setup a second instance, please visit <https://billing.holodyn.com/cart.php?a=add&pid=66>.

Once logged into your account, from the **Services > My Services** page you can open the **wbAvaTax for WHMCS** product and copy your license key. You may use the “Reissue” button any time you change domains, or setup a second service instance for an additional domain. You may have as many service instances as you require.

Activating WHMCS Tax Rules

To allow for tax data to be stored and represented within the system you must enable the tax feature of WHMCS under [Setup >> Payments >> Tax Rules]. From the Tax Rules page you will check the “Tax Enabled” checkbox and select whether to use the “Exclusive” or “Inclusive” tax type. Be aware that changing the Tax Type may adversely affect previously generated invoices and should be done with caution.

When using the Avalara AvaTax Addon all Level 1 and Level 2 tax rules setup within WHMCS will be ignored. To prevent any accidental changes that could be made to an invoice by WHMCS we recommend that you do not define any Tax Rules within WHMCS.

Customizing Client Invoice PDF Template

The WHMCS template file used for generating an invoice for both the admin and client interface comes from the client template (e.g. /templates/six/invoicepdf.tpl). This file must be updated if you wish to include the tax line item on your downloadable / printable / emailed invoices. This customization will require you to edit the existing `invoicepdf.tpl` file and add the following lines at the top of the file. You will need to maintain this customization with every WHMCS upgrade, as the file maybe overwritten.

/templates/six/invoicepdf.tpl

```
<?php

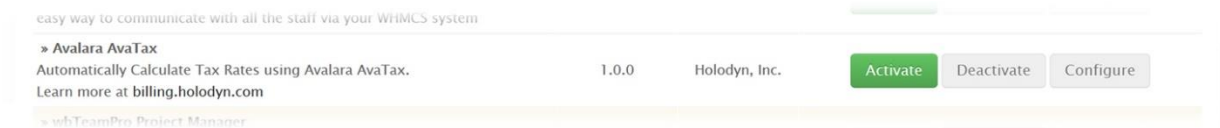
# wbAvaTax Invoice Customization
if (empty($taxname) && (real)$model->getOriginal()['tax'] > 0) {
    $taxname = 'Tax';
    $taxrate = $model->getOriginal()['taxrate'];
}
if (empty($taxname2) && (real)$model->getOriginal()['tax2'] > 0) {
    $taxname2 = 'Tax';
    $taxrate2 = $vars['model']->getOriginal()['taxrate2'];
}
```

You can find a copy of this code on our documentation website <https://docs.holodyn.com/>.

Configuration

Configuring the Addon

Before using the Avalara AvaTax addon you will need to provide some basic account information and review the available configuration options. To access the configuration sections press the “Configure” button on the WHMCS Addon management page. [Setup >> Addon Modules]



AvaTax System Settings

1. **App License Key** – Your unique Key, obtained from billing.holodyn.com when the module was downloaded.
2. **Company Code** – Your unique code, obtained from your Avalara Account.
3. **Account ID** – Your unique ID, obtained from your Avalara Account.
4. **License Key** – Your unique Key, obtained from your Avalara Account.
5. **Developer Mode** – Check box to signify whether to use the Live Service URL or the Developer Service URL when connection to the Avalara AvaTax service.
6. **Live Service URL** - This is the fully qualified URL used for connecting to the Live Avalara AvaTax service. (default <https://avatax.avalara.net>)
7. **Developer Service URL** – This is the fully qualified URL used for connecting to the Avalara AvaTax Developer Testing service. (default <https://development.avalara.net>)
8. **Socket Communication Timeout** – This is the amount of time before you server connection will time out when connecting to Avalara. This is primarily available for testing purposes.
9. **AvaTax Operations** - Perform PING Test Button will is important to validate connection to AvaTax system. A successful ping test verifies both connectivity and your credentials.

AvaTax System Settings	
The following options are core setti	
App License Key *	<input type="text"/>
Company Code *	<input type="text"/>
Account ID *	<input type="text"/>
License Key *	<input type="text"/>
Developer Mode	on <input type="checkbox"/> <input type="button" value="Connect"/>

NOTE: PLEASE SAVE ALL CONFIGURATIONS BEFORE PERFORMING PING TEST

Address Validation

10. **Disable Address Validation** - This is the secondary function of the addon and will only leave tax calculation as functioning feature.
11. **Format Address in Uppercase** – This will request that Avalara return the **validated** address in ALL UPPERCASE letters. This is a personal choice and will not affect tax calculations.
12. **Filter Address Validation by Country** – This is an Include Only type filter. Adding Countries to this list will exclude all other countries not in this list from the Address Validation process.
13. **Auto-Update Client Address** – This feature will cause the values returned by the Address Verification service to be automatically applied to the client record. This feature will not operate if “Disable Address Validation” is selected.

Tax Calculation & Processing

14. **Disable Tax Calculation** – This disables the primary function of the addon and will only leave address validation as a functioning feature.
15. **Commit on Post** – This option will cause the invoice to be marked as “Committed” when posted to Avalara. If this option is de-selected then invoices will be left in a pending status awaiting a manual batch operation to approve them for use in future tax accounting.
16. **Lock Invoice once Committed** – This option controls the ability to change line items for an invoice once the status is changed from Unpaid. This option should be enabled to prevent invoices from being edited once they are committed in the AvaTax system.
17. **DocType for Unpaid Invoices** – Choose what DocType to transmit to AvaTax when performing the getTax request.
 - * NOTE * Once an invoice is marked Paid it will be processed as a SalesInvoice automatically.
 - i. **SalesInvoice:** Store the invoice when querying the Avalara system for tax data.
 - ii. **SalesOrder:** Do NOT store the invoice when querying the Avalara system for tax data.
18. **Refund Operation** – Choose what Avalara should do when an invoice is Refunded.
 - i. **Refund:** Add a refund record to Avalara to offset the original invoice.
 - ii. **Cancel:** Mark the original invoice record with a “Void” status.
 - iii. **None:** Do nothing in Avalara
19. **Log Activity** – Choose to what depth you want Avalara to be recorded in the WHMCS logs.
 - i. **Error:** Only show Avalara errors in the log.
 - ii. **All:** Show all Avalara activity in log.
 - iii. **None:** Show NO Avalara activity in log.

Tax Calculation & Processing (Bypass Rules)

The bypass calculation rules allow you to filter the taxes returned by AvaTax before they are applied to your invoice. This feature is available for cases where you require specific taxes to be ignored by Country or Jurisdiction, or where you are managing tax collection through an external practice.

20. **Bypass Tax Application** – This option will instruct the addon **NOT** to apply tax values to the invoice once the AvaTax request is made. This is useful for testing or instances where you want to do not want the taxes presented to the customer.

For a list of the Country and Tax Name codes that can be used for bypass exclusion please download our worksheet: <https://billing.holodyn.com/dl.php?type=d&id=48>

21. **Exclude Bypass by Country** – This filter will exclude countries from the Bypass Tax Application option, allowing the taxes for matching counties to be applied to the invoice.

For example, to apply all US and CA taxes, but ignore all other countries, you would enter the value “US,CA”

22. **Exclude Bypass by Tax Name** – This filter will exclude tax names from the Bypass Tax Application option, allowing the taxes for matching jurisdictions to be applied to the invoice.

For example, in Dekalb County Georgia the Tax Names provided by AvaTax may read as follows:

GA STATE TAX

GA CITY TAX

GA COUNTY TAX

GA SPECIAL TAX

If you wish to apply only the GA STATE taxes, you could enter “GA STATE” for Georgia state tax, or “STATE” if you wish to match all state taxes. The matches are case insensitive and will match any portion of the string.

VAT Tax Integration

23. **Enable Vat ID Collection** – When enabled the system can be configured to transmit the customer VAT ID to Avalara for use with the tax calculation. This feature requires that a custom client field be created for VAT ID collection during client registration / checkout.
24. **Custom Field Binding** – Select the WHMCS “Custom Client Field” that will be used for collecting the VAT ID from your customer.
25. **Vat ID Validation Rules** – Regular expression rules can be defined that will be used to validate the values provided by a new customer during checkout. Regular expressions can be either generic or country specific and are specified one per line. Country specific filters are preceded by a 2-Character country code and colon (:), then the regular expression. Regular expressions should begin and end with a forward slash (/). Any valid rule match triggers an overall success.
26. **Strict Rule Comparison** – This option controls whether the presence of a country specific validation rule will disqualify a comparison against generic (non-country specific) rules.

IMPORTANT NOTICE

Avalara AvaTax will only accept a VAT ID upon the initial submission of the invoice. To change the VAT ID for an invoice you will need to cancel or refund the invoice, then generate a new invoice.

Localization

- 27. **Origin Address** – This is the address for your company, used by Avalara AvaTax as the “Sellers” location when performing tax calculations. The first of the three lines may be used for your Company Name.
- 28. **Origin City** – The City of your Company Address.
- 29. **Origin Region** – The State / Region of your Company Address.
- 30. **Origin Postal Code** – The Zip / Postal Code of your Company Address.
- 31. **Origin Country** – The Country of your Company Address.

Tax Codes

- 32. **Generic TaxCode** – This is the tax code used for all taxable custom invoice items.
- 33. **Generic Exclude TaxCode** – This is the tax code used for all non-taxable custom invoice items.
- 34. **Promo Code TaxCode** – This is the tax code used with all promotion items.
- 35. **Domain TaxCode** – This is an optional tax code used for all **domain** products sold.
- 36. **Billable Item Tax Code** - This is the tax code for all your **billable item** products.

WHMCS Permissions

- 37. **Access Control** - Choose the admin role groups to permit access to the AvaTax Module. This will display all of your **Admin** Role Groups. Selecting the Role Group will signify access to the AvaTax Addon history Page.

Tax Code Setup

List of Tax Codes

A list of all available tax codes can be found at <https://taxcode.avatax.avalara.com/>.

Generic, Promotion, Domain, and Billable Item Tax Codes

These tax codes are specified for the entire system under the Addon **Main Configuration**.

Product Group Tax Codes

From the Product Group editor you will find a Group TaxCode field, which will be used whenever a product within the group is purchased. This value is overwritten when a specific product TaxCode is available.

Group TaxCode TaxCode for use with Products within this Group (default)

Product Tax Codes

From the product editor you will find the Product TaxCode field, which will be used whenever the product is purchased.

Product TaxCode TaxCode for use with this Product (override group code)

Product Addon Tax Codes

From the product addons editor you will find the Product Addon TaxCode field, which will be used whenever the Product Addon is purchased.

Product Addon TaxCode TaxCode for use with this Product Addon

Client Specific Tax & Entity Codes

From the client profile page you will find two new fields where Avalara specific codes can be defined. These codes are used on all invoices for the client, the rules of which are defined within the Avalara system.

- **Tax Exemption Number**

The Tax Exemption Number is used for tracking exemptions within Avalara and does not affect the invoice process within WHMCS.

The screenshot shows a section of the WHMCS interface. At the top, there is a label 'Tax Exempt' followed by a checkbox labeled 'Don't Apply Tax to Invoices'. Below this, there is a text input field labeled 'Tax Exemption Number' with the text 'for Avalara Tracking' to its right. Below the input field, there is another checkbox labeled 'Separate Invoices for Services'.

- **Tax Entity Code**

The Tax Entity Code is used for delegating sweeping rules to a client. The codes are defined within the Avalara system.

The screenshot shows a section of the WHMCS interface. At the top, there is a dropdown menu labeled 'Language' with 'Default' selected. Below this, there is a text input field labeled 'Tax Entity Code' with the text 'for Avalara Tracking' to its right. Below the input field, there is another dropdown menu labeled 'Status' with 'Inactive' selected.

IMPORTANT NOTICE

All Tax Codes are managed within Avalara. Tax Codes may affect the actual tax value returned from Avalara during invoice processing. Be sure to understand the effect of different Tax Codes before assigning them to a client or product.

Address Validation

The Address Validation feature verifies your primary client address for accuracy, providing an opportunity to update the address when recommended by Avalara.

If **Address Validation** is turned on (within the configuration) then each client primary address will be validated when saving the client's profile. When an updated address is found you will then be given the option to use the newly validated address, or ignore the message and keep the current address.

AvaTax Provided Updated Address Information

Line1: 206 Washington St SW
Line2:
City: Atlanta
Region: GA
PostalCode: 30334-9007
Country: US

i

Would you like to update the Client Record?
Yes / Apply Changes

If the **Auto-Update Client Address** feature is enabled then any changes found within the Avalara system will be automatically applied to the client record. This operation only takes place when saving the Client Profile from within the administration area of WHMCS.

Tax Calculation

The Tax Calculation feature is at the heart of your AvaTax addon, performing real-time tax calculations whenever an invoice is created or updated.

If **Tax Calculation** is turned on (within the configuration) then every time an Unpaid invoice is created or saved a new AvaTax tax evaluation will be made. When processing a Tax request with Avalara, all invoice items, tax codes, client address, and your company address are forwarded to Avalara for consideration. The AvaTax system will determine based on that information the current tax rate and total tax to be used for the invoice.

Only changes made to Unpaid or Draft invoices will be processed by the AvaTax system. Changes made to invoices in any other status will result in previously cached tax values being re-applied. When using the AvaTax system it is important to recognize that, while WHMCS may allow you to modify the status or line items of an invoice, only the initial phases of an invoice are tracked within Avalara. Once an invoice is posted to the Avalara system they can only be Voided or counteracted with a new Refund record.

Remote Synchronization

Invoices are synchronized between WHMCS and Avalara during invoice engagement and automated operations. Synchronization between the systems can be impacted by network errors or when the status of a record in Avalara prevents an operation. All errors are recorded and after 5 consecutive errors the operation will no longer be processed during the invoice audit.

All getTax requests are cached and used for repeat events within a 24-hour period. Whenever a request to Avalara results in a “DocStatus is invalid for this operation” error, the most recent successful tax request is used.

Invoice Audit Report

An invoice audit page is provided for tracking synchronization between WHMCS and the Avalara AvaTax system. From the page each WHMCS invoice is represented, reflecting the current **Invoice Status** and totals, the **Audit Status** indicating the status of review, and the **Sync Status** indicating the remote event success.

The **Audit Status** indicates the Avalara AvaTax record status determined appropriate based on the local invoice status. The remote Avalara AvaTax system should reflect this status upon a successful synchronization.

- **Pending or Ready** – this indicates an invoice that is awaiting conditions for remote processing
- **Posted** – this indicates an invoice that posted to the Avalara AvaTax
- **Committed** – this indicates an invoice that is posted and committed to the Avalara AvaTax
- **Cancelled** – this indicates an invoice that is cancelled in Avalara AvaTax
- **Refunded** – this indicates an invoice that is Refunded in Avalara AvaTax

The **Sync Status** represents the result of the last attempt to settle the local **Audit Status** against the remote Avalara AvaTax system.

- **Pending** – this indicates that the remote call has not yet been made to address a difference in local and remote status
- **Complete** – this indicates that both systems are synchronized
- **Aborted** – this indicates that a local configuration or customer requirement is preventing the operation. The **Aborted** status will cause the invoice to be ignored by the synchronization processor. This status is NOT an error, but may indicate something that needs to be addressed.

Note: You may re-run an Aborted record from the Audit List or RESET all Aborted records to Pending from the Addon Configuration page.

- **Error** – this indicates that an error has occurred during the operation. The **Sync Errors** value will track how many times an attempt was made. After 5 attempts the Error status will remain but the invoice will be ignored by the synchronization processor.

WHMCS > Addons > Avalara AvaTax

Avalara AvaTax

Invoice Report

History

Configuration

Search

Date Start

mm / dd / yyyy

Invoice #

Invoice Status

- Any -

Filter

Export

Audit Status

- Any -

Date Finish

mm / dd / yyyy

Client #

Sync Status

- Any -

Limit

50

173 Records Found, Page 1 of 4

1 2 3 4

Invoice	Client	Invoice Date	Activity Date	Invoice Status	Audit Status	Subtotal	Tax Estimated	Tax Collected	Tax Posted	Tax Owed	Sync Status	Sync Errors	Last Message
704	David Hunt #83	2021-05-12	2021-05-12 11:36am	Paid	Committed	£272.63 GBP	£21,82 GBP	£21,82 GBP	£21,82 GBP	£0,00 GBP	Complete	0	Committed 21.82 Tax on 272.63 Taxable
703	David Hunt #83	2021-05-12	2021-05-12 03:26pm	Unpaid	Ready	£141.04 GBP	£11,29 GBP	£0,00 GBP	£0,00 GBP	£0,00 GBP	Complete	0	Resolved 11.29 Tax on 141.04 Taxable
702	David Hunt #83	2021-05-12	2021-05-12 11:19am	Paid	Committed	£918.79 GBP	£73,50 GBP	£73,50 GBP	£73,50 GBP	£0,00 GBP	Complete	0	Committed 73.50 Tax on 918.79 Taxable
701	David Keir #82	2021-05-12	2021-05-12 10:33am	Paid	Committed	£938.79 GBP	£75,10 GBP	£75,10 GBP	£75,10 GBP	£0,00 GBP	Complete	0	Committed 75.10 Tax on 938.79 Taxable
700	David Test #81	2021-05-12	2021-05-12 10:30am	Unpaid	Ready	£946.79 GBP	£75,74 GBP	£0,00 GBP	£0,00 GBP	£0,00 GBP	Complete	0	Resolved 75.74 Tax on 946.79 Taxable
699	David Hunt #80	2021-05-12	2021-05-12 10:27am	Unpaid	Ready	£918.79 GBP	£73,50 GBP	£0,00 GBP	£0,00 GBP	£0,00 GBP	Complete	0	Resolved 73.50 Tax on 918.79 Taxable
698	David Hunt #79	2021-05-12	2021-05-12 01:01am	Paid	Committed	\$66.21USD	\$5.30USD	\$5.30USD	\$5.30USD	\$0.00USD	Complete	0	Committed 5.30 Tax on 66.21 Taxable
697	David Hunt #79	2021-05-12	2021-05-12 12:44am	Paid	Committed	\$59.14USD	\$4.73USD	\$4.73USD	\$4.73USD	\$0.00USD	Complete	0	Committed 4.73 Tax on 59.14 Taxable
696	David Hunt #79	2021-05-12	2021-05-12 04:43am	Unpaid	Ready	\$59.14USD	\$4.73USD	\$0.00USD	\$0.00USD	\$0.00USD	Complete	0	Resolved 4.73 Tax on 59.14 Taxable
695	David Hunt #79	2021-05-12	2021-05-12 12:41am	Paid	Committed	\$21.21USD	\$1.70USD	\$1.70USD	\$1.70USD	\$0.00USD	Complete	0	Committed 1.70 Tax on 21.21 Taxable

Transaction History Log

For tracking and debugging purposes the Avalara AvaTax Addon includes a history log that shows all connections made between WHMCS and the Avalara AvaTax system. To view the log click on the Avalara AvaTax option under the Addons main menu.

The Avalara AvaTax Log shows all activity related to the Avalara AvaTax Addon.

WHMCS > Addons > Avalara AvaTax

Avalara AvaTax

Invoice Report

History

Configuration

Search

Date Start

mm / dd / yyyy

AvaTax Result

- Any -

Invoice #

Filter

Export

Date Finish

mm / dd / yyyy

Invoice Status

- Any -

Client #

Limit

50

2602 Records Found, Page 2 of 53

123456>>

ID ↑	Date	DocCode	Function	Result	Trx Code	Client	Invoice	Status	Amount	Taxable	Tax	Summary
2573	2021-05-12 10:33am	WHMCS-SI-701	getTax	Success: C - Using JAAS	6425228074029510	David Keir #82	701	Paid	938.79	938.79	75.10	#0: 8% (75.10) - GA STATE TAX (GEORGIA) 4% - GA COUNTY TAX (DEKALB) 3% - GA SPECIAL TAX (DEKALB CO TSPLOST SP) 1%
2572	2021-05-12 02:33pm	WHMCS-SO	getTax	Success: C - Using JAAS	6425228063125475	-	-	-	938.79	938.79	75.10	#0: 8% (75.10) - GA STATE TAX (GEORGIA) 4% - GA COUNTY TAX (DEKALB) 3% - GA SPECIAL TAX (DEKALB CO TSPLOST SP) 1%
2571	2021-05-12 02:33pm	-	validate	Success	6425228059491804	-	-	-	-	-	-	3900 MENLO DR ATLANTA GA 30340-5118 DEKALB, US
2570	2021-05-12 02:33pm	WHMCS-SO	getTax	Success: C - Using JAAS	6425228014805390	-	-	-	938.79	938.79	75.10	#0: 8% (75.10) - GA STATE TAX (GEORGIA) 4% - GA COUNTY TAX (DEKALB) 3% - GA SPECIAL TAX (DEKALB CO TSPLOST SP) 1%
2569	2021-05-12 02:33pm	-	validate	Success	6425227973274610	-	-	-	-	-	-	3900 MENLO DR ATLANTA GA 30340-5118 DEKALB, US
2568	2021-05-12 10:30am	WHMCS-SI-700	getTax	Success: C - Using JAAS	6425226215163844	David Test #81	700	Unpaid	946.79	946.79	75.74	#0: 8% (75.74) - GA STATE TAX (GEORGIA) 4% - GA COUNTY TAX (DEKALB) 3% - GA SPECIAL TAX (DEKALB CO TSPLOST SP) 1%
2567	2021-05-12 02:30pm	WHMCS-SO	getTax	Success: C - Using JAAS	6425226204676557	-	-	-	946.79	946.79	75.74	#0: 8% (75.74) - GA STATE TAX (GEORGIA) 4% - GA COUNTY TAX (DEKALB) 3% - GA SPECIAL TAX (DEKALB CO TSPLOST SP) 1%
2566	2021-05-12 02:30pm	-	validate	Success	6425226200252874	-	-	-	-	-	-	3900 MENLO DR ATLANTA GA 30340-5118 DEKALB, US
2565	2021-05-12 02:30pm	WHMCS-SO	getTax	Success: C - Using JAAS	6425226151391504	-	-	-	946.79	946.79	75.74	#0: 8% (75.74) - GA STATE TAX (GEORGIA) 4%

PLEASE NOTE

All administrators that are setup with access to the Avalara AvaTax Addon will have access to view this log. This log is used as a cache for repeated transactions to reduce processing times.

Important Exceptions

- **WHMCS Tax Rules**

WHMCS > Setup > Payments > Tax Rules

- **Tax Enabled** status must be **ENABLED**
- The **Apply Tax** options are ignored - Avalara is in control of the tax viability of a product, which is controlled through tax codes and client exemptions.
- All previous **Level 1 Rules** and **Level 2 Rules** must be **REMOVED**. Leaving tax rules will cause a conflict in the system calculations.
- The **Deduct Tax Amount** feature must be **DISABLED**

- **Address Regions**

/modules/addons/wbavatax/inc/statesdropdown.js

Address regions within WHMCS are stored in the long name format, but returned from Avalara as a 2-character abbreviation. WHMCS uses form select filters rendered by javascript to limit the input options. To resolve the conflict Avalara AvaTax for WHMCS includes a javascript override that provides the required 2-character abbreviation codes. All country regions are managed in a custom statesdropdown.js file, where new region codes may be added or modified for a specific country.

- **Promotions**

WHMCS > Setup > Payments > Promotions

- In WHMCS tax is calculated from the subtotal of all line items, which conflicts with the per-item calculation performed within AvaTax. When using Avalara AvaTax for WHMCS the tax will be calculated per line with the promotion subtracted from the resulting total.

- **Invoices**

WHMCS > Billing > Invoices (edit)

- The "Taxed" column is disabled for all existing invoice items. New custom invoice items can be flagged for tax exclusion. AvaTax tax rules control the ultimate taxability of all items. Custom invoice items will use the "Generic TaxCode" and "Generic Exclude TaxCode" from the Avalara AvaTax for WHMCS configuration.
- AvaTax GetTax request is ONLY Processed when creating an invoice or updating an Unpaid invoice. All other invoice changes are either blocked or will receive the cached value from the last request to AvaTax.
- Restoring an invoice from a committed status will **NOT** re-open the related AvaTax sales order. Once an invoice is Paid, Refunded, or Cancelled it cannot be reinstated.

Web API

Avalara AvaTax for WHMCS includes a remote Web API endpoint that may be used to engage with the data collected by the AvaTax for WHMCS system.

<https://yourwebsite.com/modules/addons/wbavatax/api.php>

Included with your installation is a Web API sandbox script that shows how to connect, query available commands, and perform requests. To install the sandbox script, upload the included folder “API-Developers-Sandbox” to the WHMCS web root or other accessible location on your web server. Make a request to the “API-Developers-Sandbox /sandbox.php” script to load the testing tool. On the top-right of the interface you will provide the server address and permitted administrator credentials. The credentials must be for an administrator permitted to access the Avalara for WHMCS module. Once connected, use the interface on your left to load and submit test requests. The included **wbavatax-apiconnect.class.php** file shows an example of how to prepare a request and parse the results.

wbAvaTax API Sandbox

API URL: API User: API Pass:

Request:

 Format:

api > findResources
 config > getConfig
 audits > findAudits
 logs > findHistory
 client > validateAddress

findResources: Return the API Resource List
 Method Call: api.resources
 HTTP Method: GET

This method has no parameters

API Response

HTTP Method: GET
 Direct URL: https://whmcs.website.com/modules/addons/wbavatax/api.php

Request -----
 Array
 ([action] => vi.api.resources.json [method] => get [params] => ["SERVER_REMOTE_ADDR":"1.1.1.1"] [username] => user [password] => pass)

Response -----
 stdClass Object
 ([request] => stdClass Object ([action] => api/resources [method] => GET [format] => json [code] => 200 [message] => Success) [response] => stdClass Object ([data] => Array () [resources] => stdClass Object ([api] => stdClass Object ([label] => API [methods] => stdClass Object ([findResources] => stdClass Object ([synopsis] => Return the API Resource List [action] => api.resources [http_method] => get))))))