

DP/SALESTAX Service Documentation and Procedures

This **Documentation and Procedures Guide** is designed to specifically provide you with complete installation instructions when installing the **DP/SALESTAX** utility for integration with 3rd party sales tax software applications and sales tax filing programs, such as **AccurateTax** and **Avalara's AvaTax** sales tax filing services.

The inclusion of the **DP/SALESTAX** feature in the latest **Version 7.63** release does not remove the existing ability for users to currently add their own Sales Tax rates to the software using the feature in the Accounts Receivable module under **"Set Up and Maintenance," "Set Up Tax Rates"** as shown on the following screen:

The screenshot shows a software window titled "Maintain Tax Rates". The window has a menu bar with "Tools", "Launch", "Navigation", and "Operation". Below the menu bar is a toolbar with various icons. The main area of the window is divided into several sections. At the top right, it says "Mode: Inquiry". Below this, there are input fields for "Tax Rate #:" (containing "99") and "Description:" (containing "Exempt"). There are two sections for "Primary Tax Rate" and "Secondary Tax Rate", each with five "Entity" input fields (Entity 1 through Entity 5) and a "Total" field, all containing "0.000 %". A "Break Point:" field contains "\$0.00". On the right side of the window, there are several buttons: "Details...", "User Fields...", "Save", "Cancel", and "Close".

Using the manual sales tax rates, users will still be able to use the existing sales tax reporting options that have always been found within the **Infinity POWER Accounts Receivable** software module. However, now users have an additional option to incorporate the use of **"DP/SALESTAX"** which features the integration with third party sales tax products such as the **Avalara AvaTax** Sales Tax Integration and Reporting features. The Data Pro **DP/SALESTAX Service** allows the **Infinity POWER** software to use the sales tax service, such as **AccurateTax** and **Avalara AvaTax**, to calculate sales tax on Sales Orders and Customer Invoices instead of manually maintaining the internal tax table rates.

The user will see no visible difference between the internal tax calculations and the **AccurateTax** and **AvaTax** service calculations. The benefit is that accurate tax calculations will be made without the user needing to continually maintain and update their internal tax rates themselves.

https://www.avalara.com/us/en/index.html

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accuratetax.com

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accuratetax

Sales Tax Compliance

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Date	State	Rate	Amount	Status
09/27/2022 08:19:32 PM	CA	9%	\$3.18	✓
09/27/2022 08:17:08 PM	CA	9%	\$2.79	✓
09/27/2022 08:04:21 PM	NV	6.15%	\$13.37	✗
	VA	6%	\$3.38	✓
	CA	7.5%	\$12.93	✓
	CA	8%	\$4.60	✓
	NY	8.875%	\$5.90	✓

4 Main St San Diego CA 92113-3803
 111 Maple St Boise ID 83714-8274
 547 N Elm St Rye NY 11576-3752
 327 243rd Ave Seattle WA 98101-4883

Various states in the United States and provinces in Canada have now implemented so many new rules and calculations that it has made it very difficult to manually maintain the tax rates. To respond, we developed a new product under the **Avalara** certification guidelines to support **Avalara's AvaTax Service**, which is optional for all Data Pro customers. We also were certified with **AccurateTax**. In the meantime, we kept our core sales tax features for those clients who do not have complicated sales tax reporting needs.

We incorporated support for **AccurateTax** and **Avalara's AvaTax** for those clients whose needs cross state borders and have far more complicated sales tax and certificate reporting needs.

Also, Sales Tax Reporting and Filing can be provided by the **AccurateTax** and **AvaTax** portals. If all sales transactions will be using the **DP/SALESTAX Service**, then the **Accounts Receivable Sales Tax Report** will no longer be needed.

The Data Pro user will first need to subscribe to the **AccurateTax and/or Avalara Sales Tax Service**. They both offer many different services and options. Therefore, we encourage our users to have a thorough conversation with one of their highly qualified sales associates.

www accuratetax.com has more information on their products.

Contact **Susan Petracco** at **AccurateTax** at **866-400-2444**
or spetracco@accuratetax.com for pricing information.

www.avalara.com has more information on their products.

Contact **Chad Meszaros** at **Avalara Sales Tax Software** at **919-627-9765**
or chad.meszaros@avalara.com for pricing information.

INSTALLATION

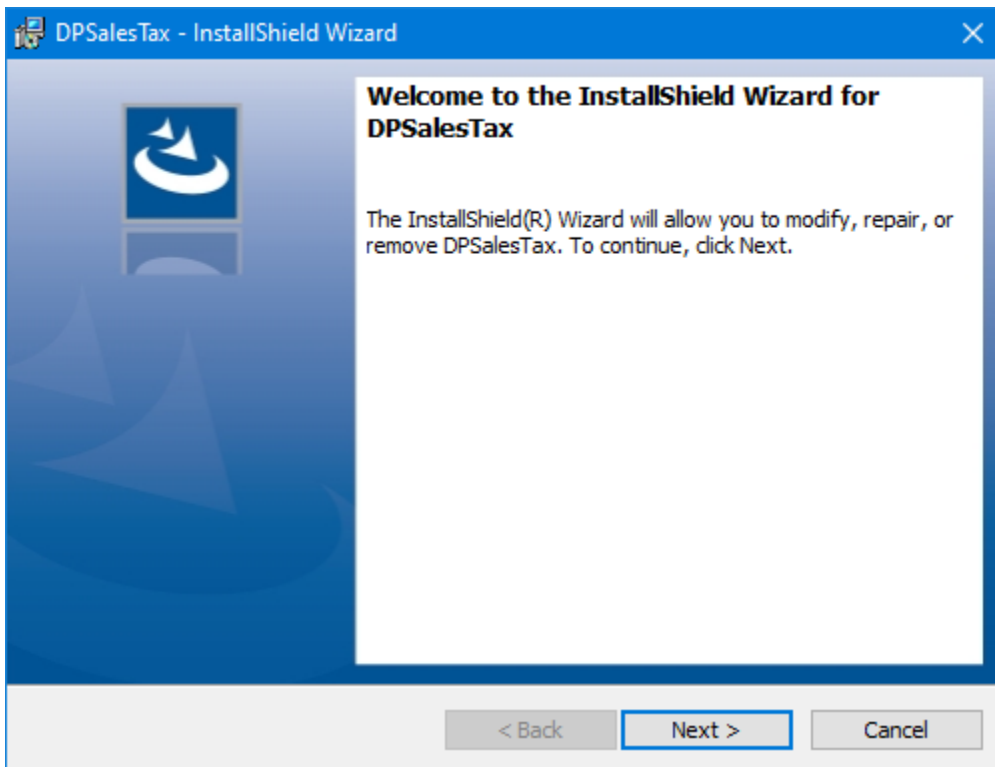
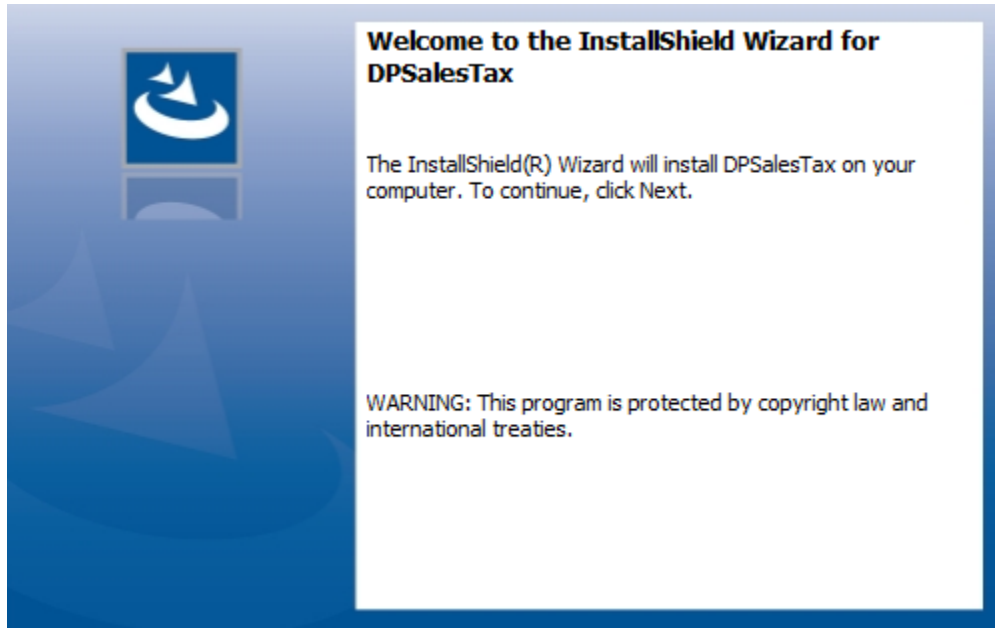
The option to download the **DP/SALESTAX** software is available now at the link listed below:

<http://www.dataproaccounting.com/download/DPSalesTaxSetup.exe>

There is no charge for this link and it will only work if you are a licensed and active **Data Pro Infinity POWER** user with the **Accounts Receivable** and/or **Point of Sale** software modules. By the nature of our natural integration among our software modules, this automatically extends to the **Infinity POWER Sales Order Entry** module and our **DP/Dashboard/CRM** e-commerce product.

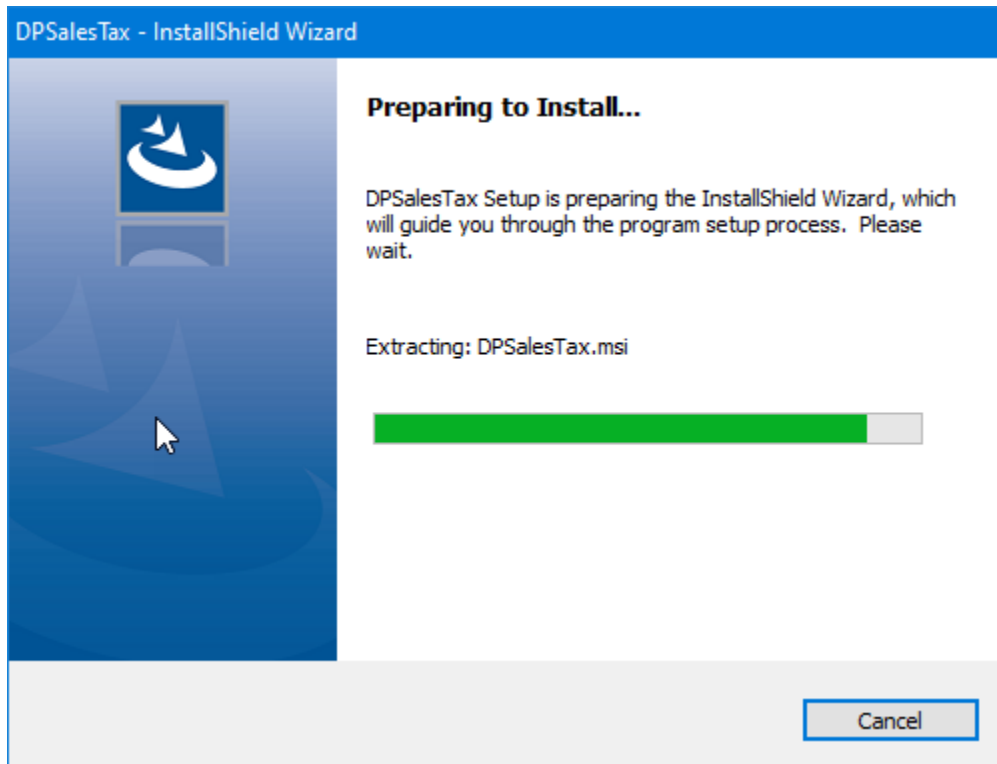


Once you click on the link, it will bring you to the **Welcome** screen to start the **InstallShield Wizard** as shown on the following screen:

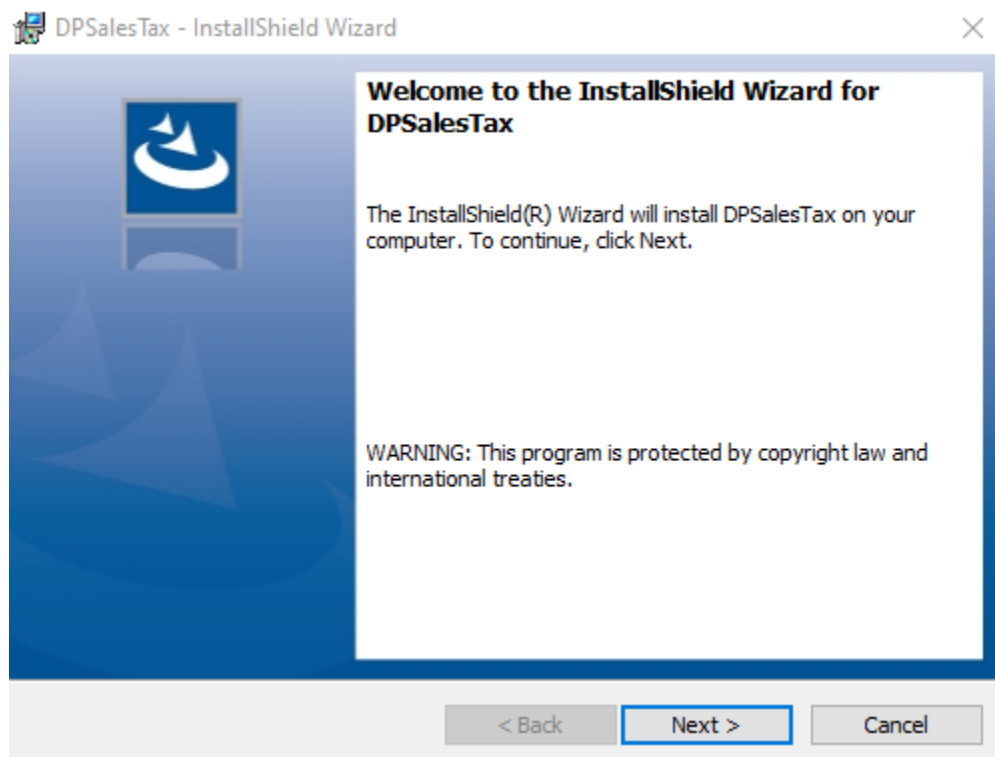


Click on **“Next”** to continue the installation, or **“Cancel”** to stop.

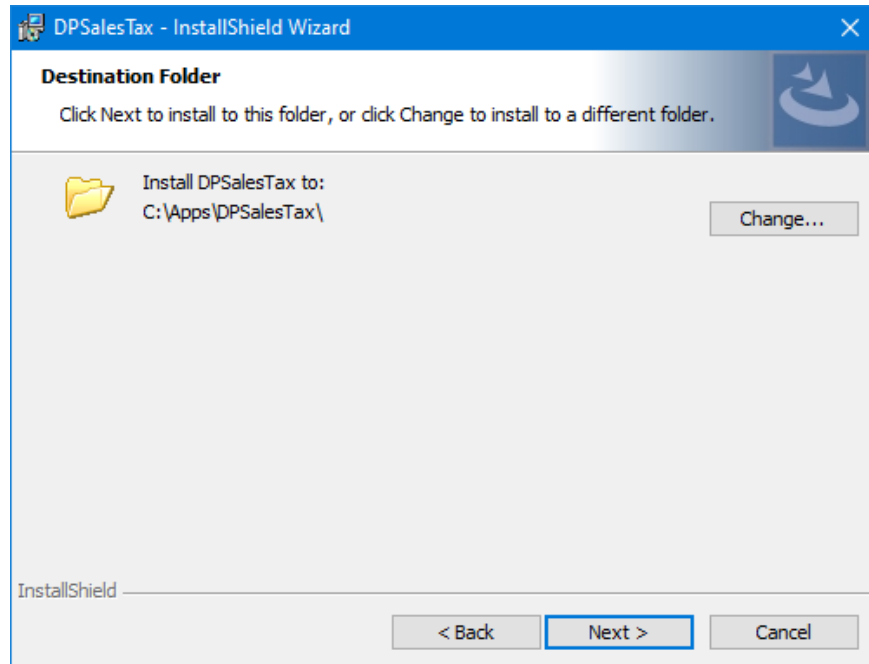
The next screen will show you that it is preparing the software for installation.



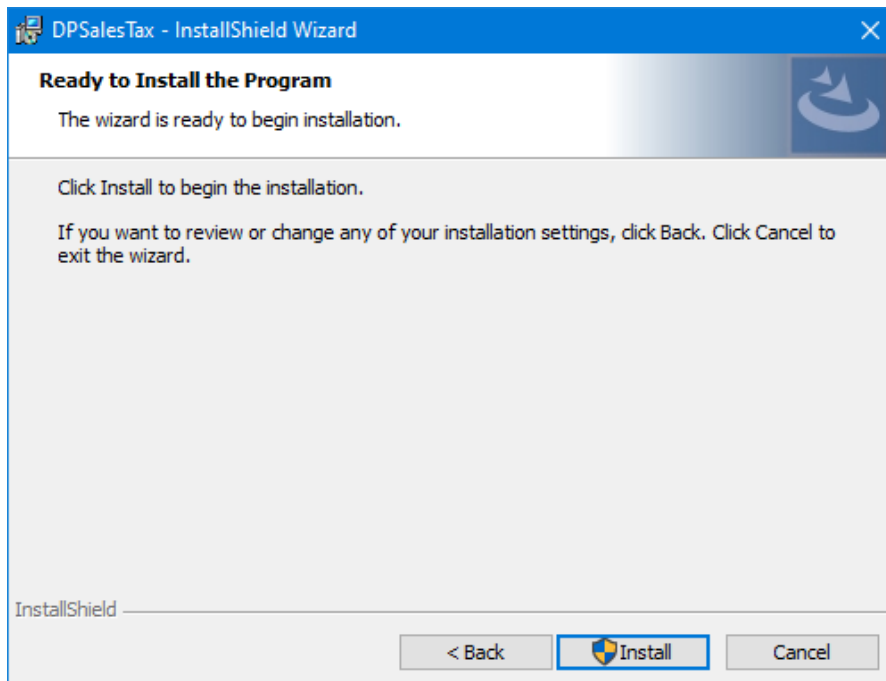
When it has completed the download, click on “**Next**” to continue the installation or “**Cancel**” to stop it.



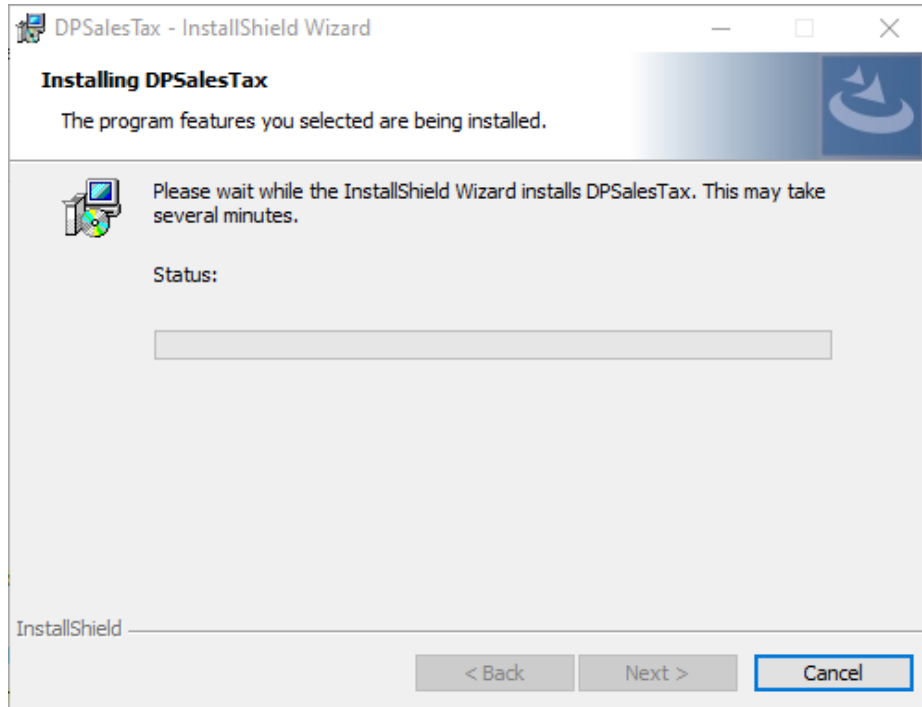
The next screen will prompt you for the default destination location where the software will want to install the software. You may override this configuration by clicking on the “**Change**” button and placing it in another folder or even on another drive.



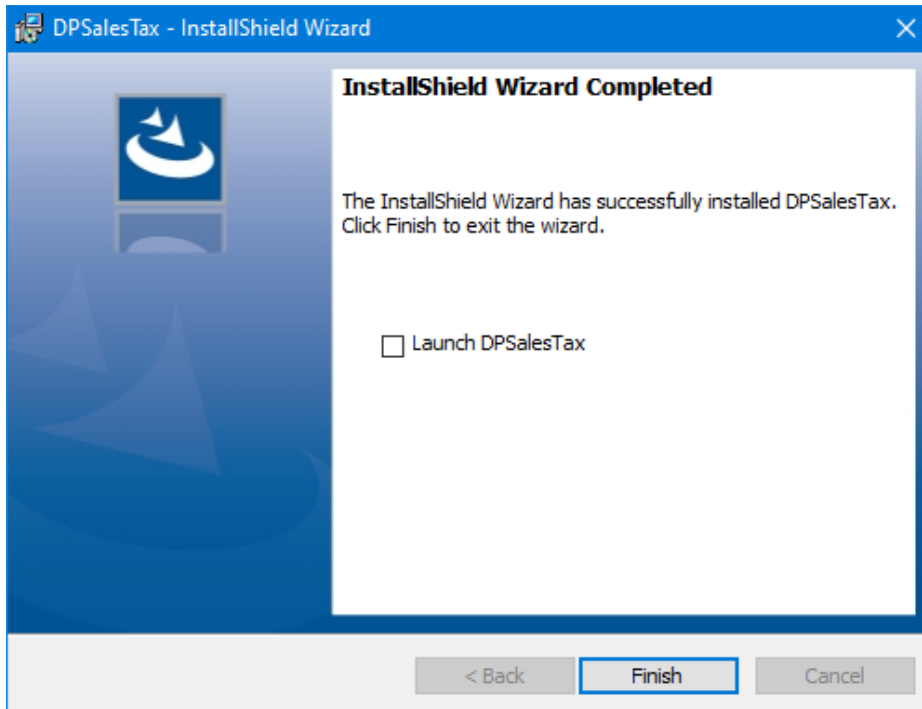
With the **Destination Folder** defined, the installation is ready to continue. Click on the “**Install**” button to begin.



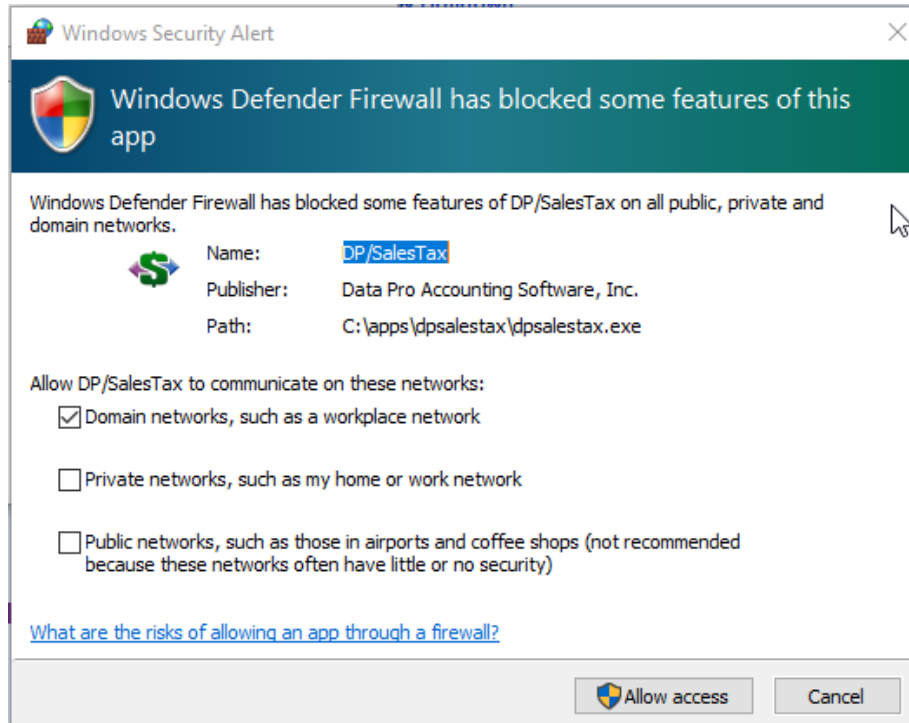
The next screen will appear while the software is being installed. You may click “**Cancel**” to halt the installation in progress.



Once the installation has completed, it will display the following screen. You have the choice to launch the **DP/SALESTAX Service** software now or you can load it at another time later. Click on the box if you wish to load it now.

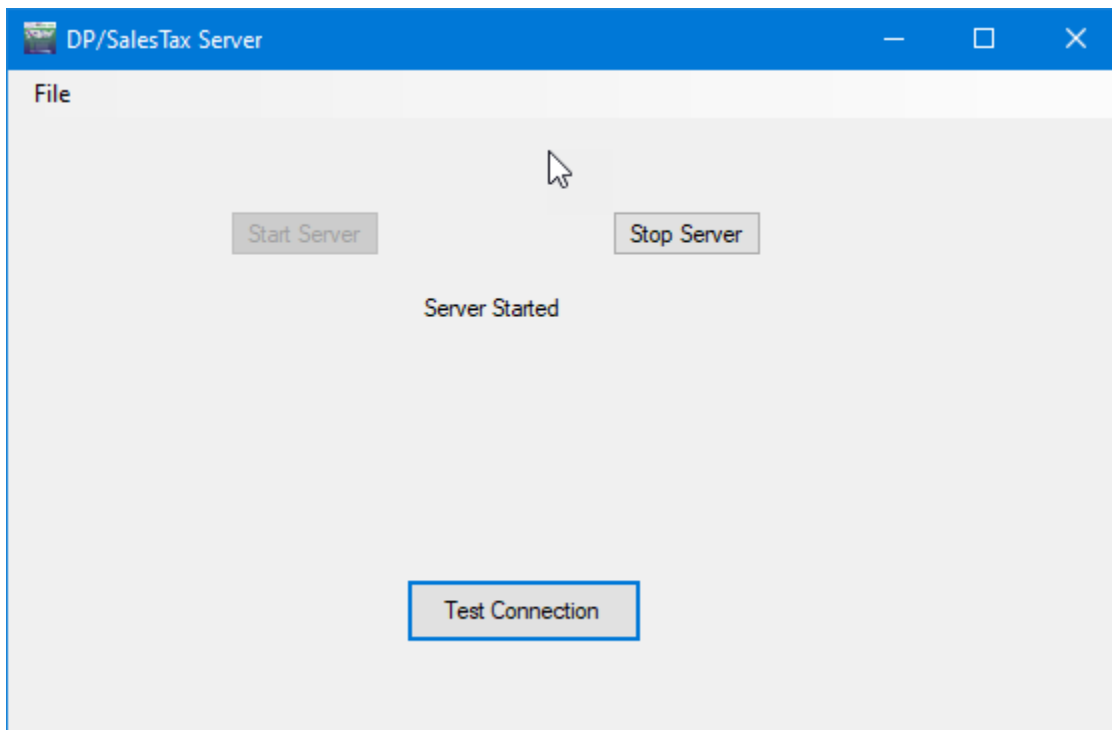


If you do choose to click on launching it now, you may be presented with a “**Windows Security Alert**” like the one display below:

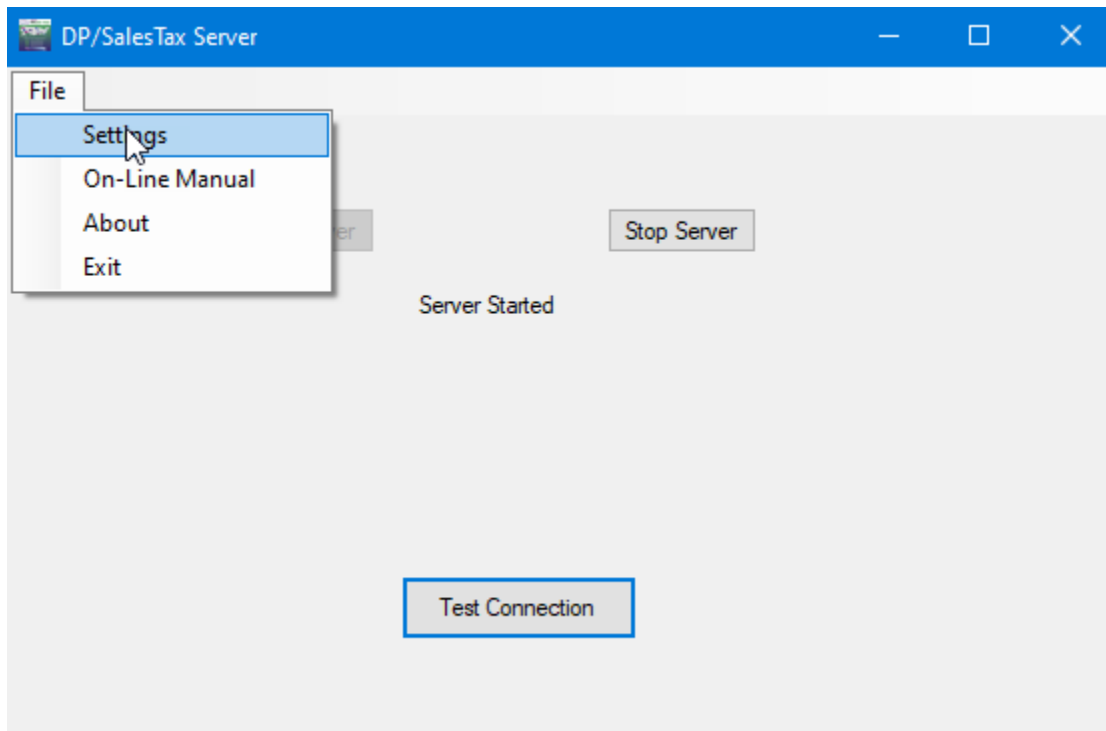


This is not uncommon. We recommend that you “**Allow Access**” to your domain networks and/or your Private Networks, such as home or work networks, depending on where you are installing the software so you are not prompted by this on a continuing basis.

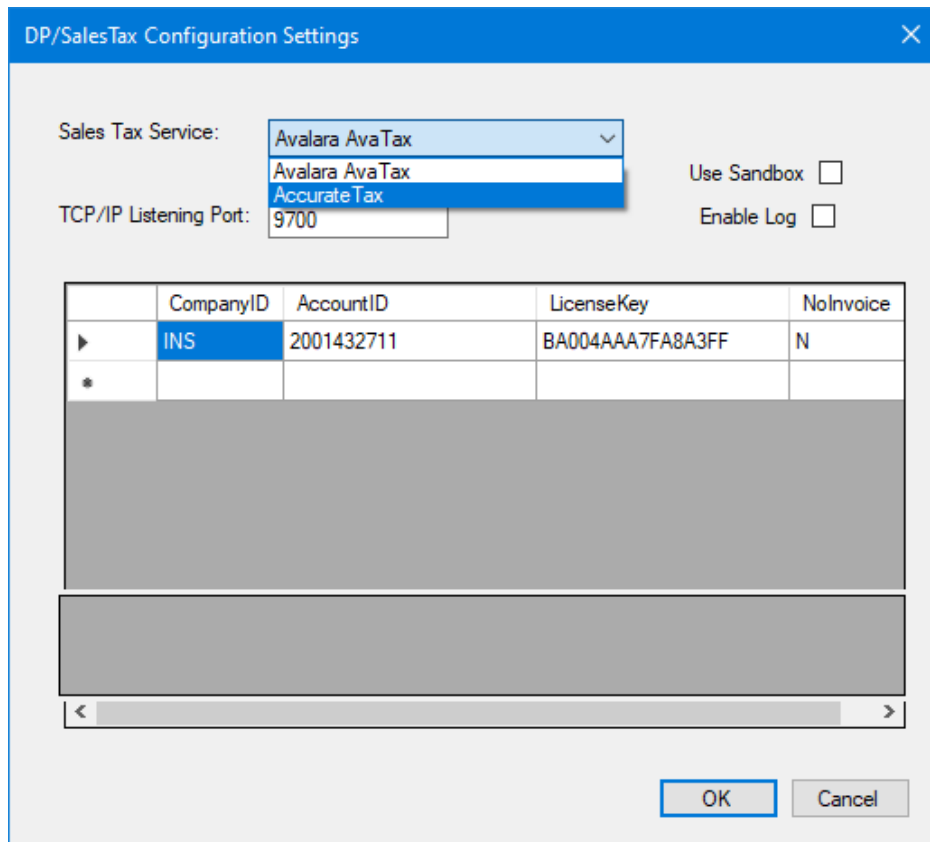
Once you “**Allow Access,**” the following screen will appear:



Once you click on **“File,”** choices will appear. The primary choice is the **“Settings”** option at the top of the menu.



Once you click on **“File,”** choices will appear. The primary choice is the **“Settings”** option at the top of the menu. When you click on **“Settings”** the following screen will appear.



The **Sales Tax Service** at the top left of the screen is “**Avalara’s AvaTax**” software product as shown above. Of course, you will not be able to proceed any further with this installation until you have contacted **Avalara** and set up an account with them. You must work out what kind of relationship and services you want to use with them.

If you have not done this by now, you need to stop here and go to www.avalara.com and contact a sales professional who can guide you through the host of products and services that they offer.

Likewise, the second choice on the menu is “**AccurateTax.**” Of course, you will not be able to proceed any further with this installation until you have contacted **AccurateTax** and set up an account with them. You must work out what kind of relationship and services you want to use with them.

If you have not done this by now, you need to stop here and go to www.accuratetax.com and contact a sales professional who can guide you through the host of products and services that they offer.

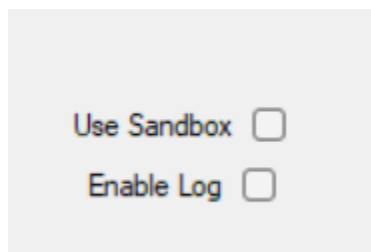
AccurateTax

Assuming that you have made arrangements with **AccurateTax**, we will continue the documentation going forward. If you have made arrangements with **Avalara AvaTax**, skip this section.

There are two modes of operations for the **DP/SALESTAX Service**. The button at the top right of the screen is designed specifically to provide you with a “**testing environment**” while you are getting prepared to use the **AccurateTax** products. There are several setup and configuration items that will need to be done properly before **AccurateTax** will be able to properly calculate and report your sales tax information on your behalf.

Therefore, before you just “**flip the switch**” and start posting transactions that create an auditing nightmare for both you and them, they provide a “**testing sandbox**” environment so that you can determine which codes your products and services fall under and to test whether you have set them up properly within your instance of the **Data Pro Infinity POWER Accounts Receivable** software.

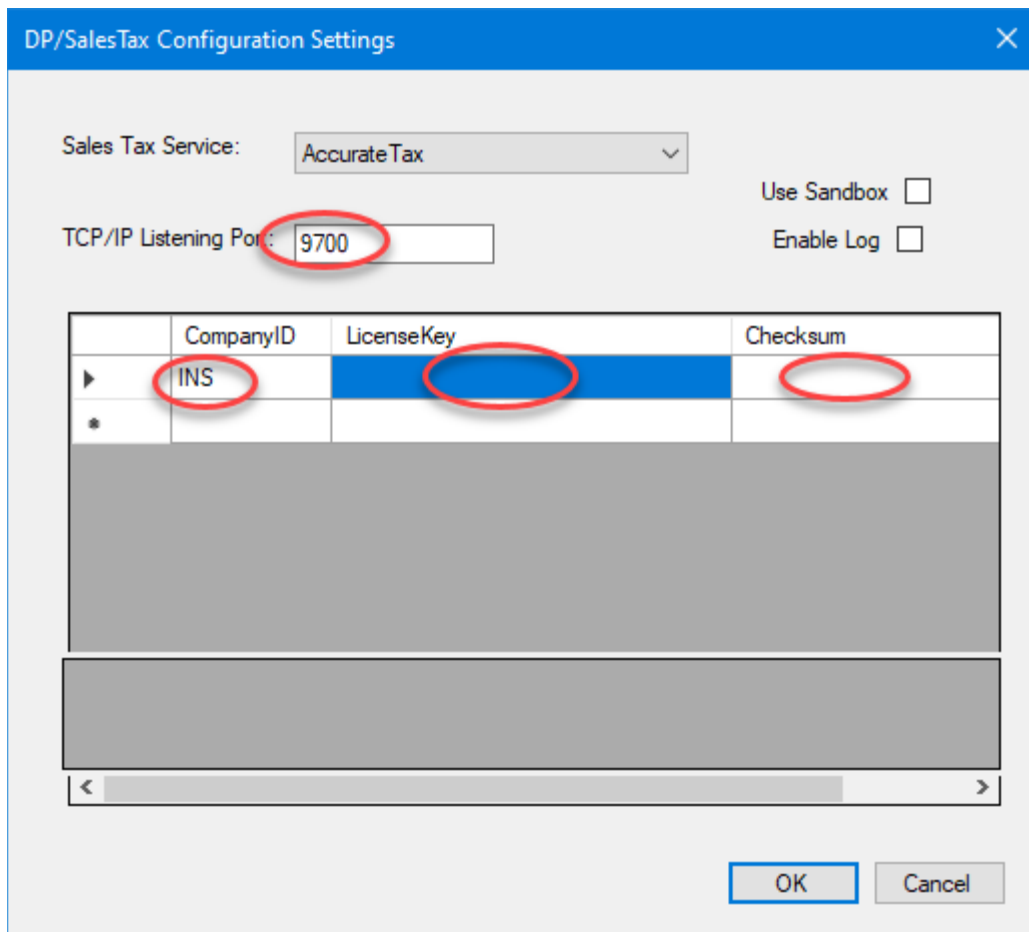
That is why the top two options at the top of the screen are shown below. They allow you to go into what is defined as the **AccurateTax “Sandbox”** and to also create a “**logfile**” so that you can see what information is being passed along and if any errors are being reported along the way.



You and your **AccurateTax** team members are not going to want you to go into a “**live processing mode**” until you are able to successfully complete testing in your **Sandbox** mode and are not reporting any errors in your log files. You will want to turn the “**log file**” off when you have completed testing. It does not need to be active during live processing.

These are not necessarily software issues that Data Pro Accounting Software can control, but more of your firm determining what is right for your business and industry and its specific needs.

Once you have your account setup and your credentials issues with **AccurateTax**, then you can go to the lower section of this screen:



The **TCP/IP Listening Port**: is a network address that is controlled within your network/firewall. It is telling **DP/SALESTAX Service** what communication port to listen on for the Data Pro software to communicate to. This can/will change from installation to installation.

The next main item is **Company ID**. You may only have one company that you need for running your Data Pro **Infinity POWER** accounting software. However, **Data Pro's Infinity POWER** is designed that customers can run as many as thousands of instances of companies within the same installation of the software. In other words, you may own five or fifty companies and run them all under one installation of Data Pro.

Therefore, you may need to do sales tax reporting for multiple firms with **AccurateTax** and your **Infinity POWER** software. If so, this screen allows you to identify each company with its unique three (3) character (*alpha/numeric*) code that represents the company code for each entity. In the previous screen, those are the letters **INS** for the **Infinity POWER Sample Company**.

The next two fields are the unique **License Key** and **Checksum** that are issued by **AccurateTax** for each individual company that has a unique Federal ID #. You would enter the corresponding **License Key** and **Checksum** that is issued for each company that you enter this table. You may only have one company and that is fine.

Click on “**OK**” when you are done entering this information.

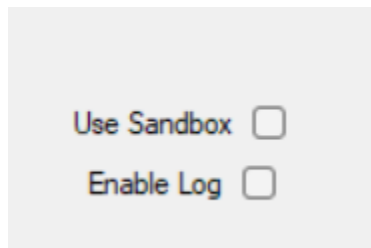
Avalara AvaTax

Assuming that you have made arrangements with Avalara’s AvaTax, we will continue the documentation going forward.

There are two modes of operations for the **DP/SALESTAX Service**. The button at the top right of the screen is designed specifically to provide you with a “**testing environment**” while you are getting prepared to use the **AvaTax** products. There are several setup and configuration items that will need to be done properly before **Avalara** will be able to properly calculate and report your sales tax information on your behalf.

Therefore, before you just “**flip the switch**” and start posting transactions that create and auditing nightmare for both you and them, they provide a “**testing sandbox**” environment so that you can determine which codes your products and services fall under and to test whether you have set them up properly within your instance of the **Data Pro Infinity POWER Accounts Receivable** software.

That is why the top two options at the top of the screen are shown below. They allow you to go into what is defined as the **Avalara “Sandbox”** and to also create a “**logfile**” so that you can see what information is being passed along and if any errors are being reported along the way.



You and your **Avalara** team members are not going to want you to go into a “**live processing mode**” until you are able to successfully complete testing in your **Sandbox** mode and are not reporting any errors in your log files. You will want to turn the “**log file**” off when you have completed testing. It does not need to be active during live processing.

These are not necessarily software issues that **Data Pro Accounting Software** can control, but more of your firm determining what is right for your business and industry and its specific needs.

Once you have your account setup and your credentials issues with **Avalara**, then you can go to the lower section of this screen:

TCP/IP Listening Port: Enable Log

	CompanyID	AccountID	LicenseKey	NoInvoice
▶	ins	200 [REDACTED]	BA00 [REDACTED]	N
•				

The **TCP/IP Listening Port**: is a network address that is controlled within your network/firewall. It is telling **DP/SALESTAX Service** what communication port to listen on for the Data Pro software to communicate to. This can/will change from installation to installation.

The next main item is **Company ID**. You may only have one company that you need for running your **Data Pro Accounting Software**. However, **Data Pro's Infinity POWER** is designed that customers can run as many as thousands of instances of companies within the same installation of the software. In other words, you may own five or fifty companies and run them all under one installation of Data Pro.

Therefore, you may need to do sales tax reporting for multiple firms with **Avalara** and your **Infinity POWER** software. If so, this screen allows you to identify each company with its unique three (3) character (*alpha/numeric*) code that represents the company code for each entity. In the previous screen, those are the letters **INS** for the **Infinity POWER Sample Company**.

The next two fields are the unique **Account ID** and **License Key** that are issued by Avalara for each individual company that has a unique **Federal ID #**. You would enter the corresponding **Account ID** and **License Key** that is issued for each company that you enter this table. You may only have one company and that is fine.

The last field is for "**No Invoice.**" The default answer for this question is "**N**" for No. This answer is like adding a "**Contra Account**" in the Data Pro General Ledger module. It is contrary to what you would think the answer should be in this section. This means that all transactions will flow to **Avalara's AvaTax** as invoice transactions to be calculated for sales tax.

A "**Y**" answer for Yes would mean that you want all transactions to be posted to **AvaTax** as a "**Sales Order Transaction**" and **NOT** a committed invoice that should be included in the filing of Sales Tax Reporting.

It would be advised that you speak directly to your **Avalara Account Manager** for clarity for configuration of this specific setting.

INFINITY POWER ACCOUNTS RECEIVABLE

The **Infinity POWER Accounting Receivable** module needs to be configured to communicate to the **DP/SALESTAX Service**. You also need to define the various “**Tax Codes**” that will be associated with the Data Pro “**Sales Codes.**” Keep in mind that when you are dealing with **AccurateTax** and **Avalara** support personnel, they are generally thinking in terms of types of Inventory Categories and Services classes.

Remember that in **Infinity POWER Accounts Receivable** software, “**Sales Codes**” are the tools that are used to groups categories or classes of products together for reporting to the **General Ledger’s Income Statement** so that management can see financial reporting in a manner that makes sense to them.

Therefore, each company can be configured very simply or very complicated. This is why your time and understanding of this matching of these two concepts will be very important on the front side of this configuration with **AccurateTax** and **Avalara** to make sure your sales tax reporting is correct while at the same time your financial statement reporting is sound going to upper management.

Data Pro’s support consultants can certainly assist you with these issues. Just contact us at dpasupport@dpro.com.

Supporting Tax Codes

To support the **Tax Codes**, a specific user defined field must be added to your existing **Accounts Receivable Sales Code** file. Data Pro support staff can assist you in making this happen properly.

Maintain User-Defined Data Fields

Tools Navigation Operation

Mode: **Inquiry**

User Field:

File Type:

Field Name:

Field Length:

Decimal Places:

Description:

Field Type:

CCHR - Characters CLNG - Long Integer

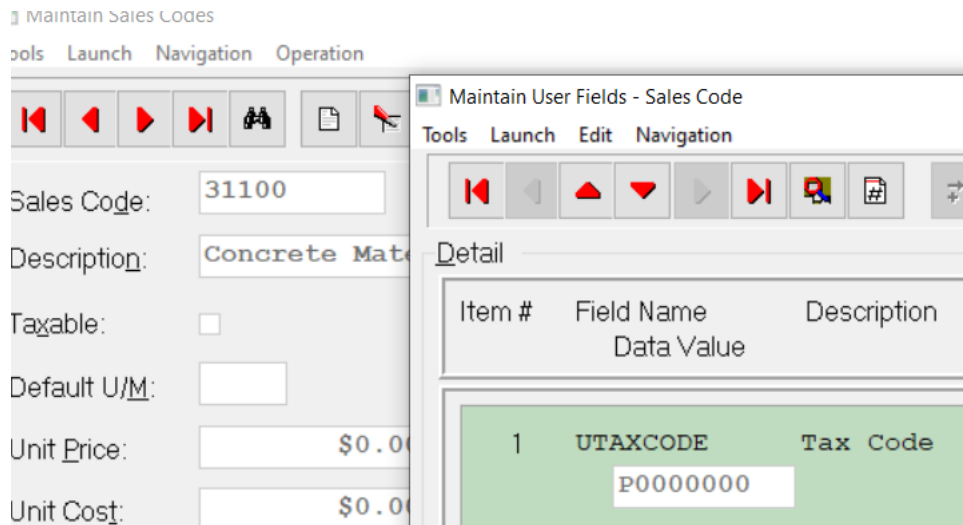
CDBL - Double CSTR - Text String

CFLT - Float DPDT - Date Field

CINT - Integer DPYN - Y/N Field

Then, each Sales Code used for normal sales, the Freight Sales Code (**SC003**), and the Finance Charge Sales Code (**SC002**) needs to have the **Tax Code** assigned to each one.

In **Avalara AvaTax**, for instance, the generic **Freight Tax Code** is **FR020000** and the generic **Finance Charge Tax Code** is **OF040003**. The generic **Tax Code for Normal Merchandise** is **P0000000**. If a Sales Code does not have the Tax Code defined for it, then it will assume a value of **P0000000**.

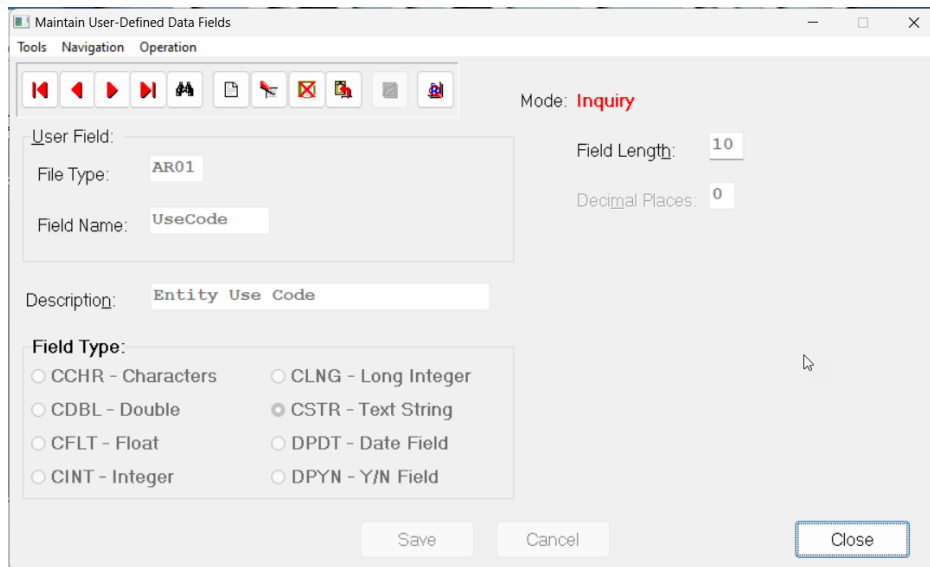


This is where your journey really starts is looking all the Sales Codes you currently have set up in your system or should be set up in your system. Unfortunately, we know too many of our clients have never mastered the proper use of Sales Codes in their software and this is the time to get this right both for **Sales Tax Reporting** and **General Ledger Financial Statement Reporting**.

The list of all the **AvaTax Tax Codes** may be found here:

<https://taxcode.avatax.avalara.com/>

A user field also needs to be added to the customer file (**AR01**) to specify an “**Entity Use Code**.”



The valid list of Avalara “Entity Use Codes” can be found here:

https://knowledge.avalara.com/bundle/dqa1657870670369_dqa1657870670369/page/Exempt_reason_matrix_for_the_U.S._and_Canada_entity_use_code_list.html

With **AccurateTax**, once your account is created and they know which states you need to do sales tax reporting in, they will provide you with a customized listing of tax codes for you to assign to your specific sales codes within your **Infinity POWER Accounts Receivable** module.

For instance, in Florida, some of the **Tax Codes** to be defined could look like the following:

Tax Codes:

- 99999 Default Taxable (sales code 51101)
- 00000 Non-Taxable (sales code 2000)
- 40030 Food (sales code 51102)
- APP Clothing
- 20070 School Supplies
- 11010 Freight/Shipping (sales code SC003)

Again, these will all be unique based on the set up and configuration of your General Ledger Chart of Accounts and how you have defined your Sales Codes to post to the General Ledger for financial statement reporting.

The next step in the **Infinity POWER Accounts Receivable** module is to define a **Tax Rate** called “**DPSALESTAX**.” To do this, you would go to the “**Accounts Receivable**” module, “**Set Up and Maintenance**,” “**Maintain Tax Rates**.” You would click to “**Add**” a new **Tax Rate**.

The “**Description**” field should contain the Host Name where the **DP/SALESTAX Service** will be installed and the **TCP Port Number**, separated by a colon (:). **TCP Port Number 9700** is the default value when the **DP/SALESTAX Service** is installed.

Maintain Tax Rates

Tools Launch Navigation Operation

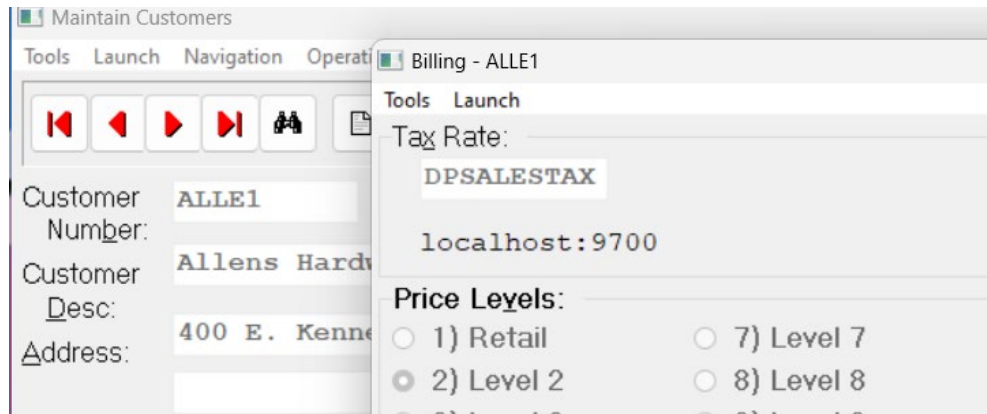
Tax Rate #: DPSALESTAX

Description: localhost:9700

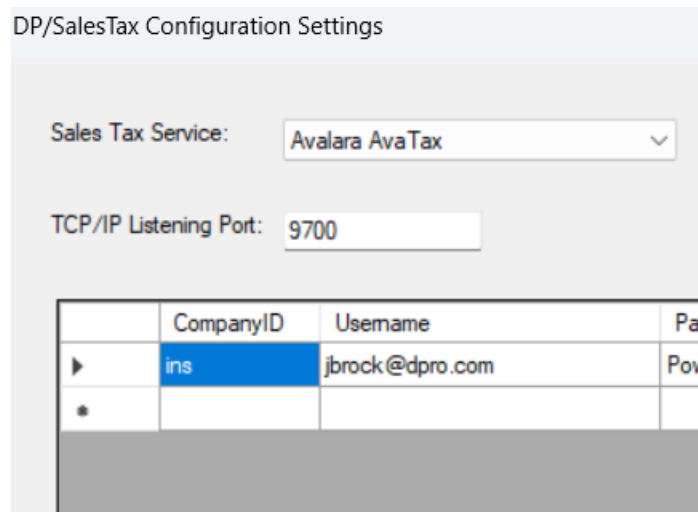
Primary Tax Rate:

Entity 1:	0.000 %	Entity 4:	0.000 %
Entity 2:	0.000 %	Entity 5:	0.000 %
Entity 3:	0.000 %	Total:	0.000 %

Then, each “Customer” and “Ship-To Location” by Customer in the Accounts Receivable module needs to be changed to define **DPSALESTAX** as the default Tax Rate under the Billing tab when you set up a customer profile using the “Maintain Customers” menu option.



The **DP/SALESTAX Service** then needs to be installed on the Data Pro server where the **Infinity POWER** application is installed and configured with the **AccurateTax** or **AvaTax** login credentials for each Data Pro company as previously covered.



AvaTax also requires the user to go back to the **AvaTax** portal and define the company IDs for all your Data Pro companies that need to calculate Sales Tax.

For Avalara:



Home Transactions Exemptions Returns Documents Reports **Settings**

COMPANIES | AVATAX ACCOUNT 2001432711

Your companies

+ Add a company | Export companies

SEARCH

All | Active | Inactive

The user will need to go to the **AvaTax** portal and enter the Data Pro Customer Number, Name, and Address for all the tax-exempt customers.



Home Transactions Exemptions Returns Documents Reports Settings

Exemption certificates | DATA PRO ACCOUNTING SOFTWARE, INC. [Switch company](#)

Customers

Search by customer name or customer code

Filters Manage columns


Customer ID	Customer code	Customer name	Address
1	UNIV1	University of Tampa	401 W. Kennedy Blvd. Tampa, FL 33614 US

Rows per page 10 Page 1 of 1 1-1 of 1

The **AvaTax** portal does provide the ability to upload an Excel file containing the exempt customer information. Data Pro technical support services will be needed to extract the specific exempt customers from the Data Pro Customer file.

Import customer and certificate data

Download a template and place your data in the correct columns.

 [Download a template and place your data in the correct columns.](#)

Drag and drop file here

Files can be up to 20MB and include up to 60,000 rows

[Choose file](#)

For AccurateTax:

AccurateTax will have you provide them with a detailed customer listing of all your tax-exempt clients, preferably in an **Excel/CSV** type file format so that they can import the data into their system. They will then provide you with a tax-exempt code for each customer that needs to be updated in the **UseCode** user field on the customer record.

ADDRESS VALIDATION

One of the key features in the integration between the **Infinity POWER Accounts Receivable** module and the **AccurateTax** and **Avalara AvaTax** software is the implementation of the use of the “**Address Validation**” service offered by both providers. This allows Data Pro customers to either upload their customer files, in advance, to get accurate and updated address validations for the most accurate Sales Tax calculations on all shipping locations, but also do it on a transactional level as well.

As shown in the sample screen below, please note the regular five-digit zip code of “**33701**” for our corporate address in St. Petersburg, FL. But, note the “**Validate**” button that sits just to the right of the “**Zip**” field.

Notice, however, on the next screen that once the “**Validate**” button is clicked, the “**Zip**” field is updated automatically by a direct call to the **AccurateTax** and/or **AvaTax** integration that pulls back and populates the Customer File the latest **Zip+Four** update to the Customer Master File. Likewise, this works the same way when you’re adding Sales Orders and posting invoices and changing Ship-To-Addresses on the fly during transaction postings.

This is a great feature and a significant reason for subscribing to either tax service. This will ensure that you are calculating and collecting the correct amount of Sale Tax and reporting it properly.

Keep in mind that when you speak to either an **AccurateTax** or **Avalara** sales tax professional, that they have three general categories of services that they offer. What your company needs, is unique to your business. That is why they will need to speak to you and determine what you will need going forward.

Breakdown of Services Offered:

- 1) Calculation of Taxes**
- 2) Management of Sales Tax Certificates**
- 3) Filing Sales Tax Returns**

It has become more and more complicated across the country to track, calculate, and file sales and use taxes. If your needs are still very simple in that you are only doing business locally and in one state, the basic sales tax tools within the **Infinity POWER Accounts Receivable** and **Point of Sale** modules will still accommodate your needs quite adequately.

However, if your needs have ballooned over recent years and your personnel expenses are exploding trying to keep up with all the new regulations and reporting requirements, then this is why we have built in these sales tax solutions.

Please feel free to call us or e-mail with any queries that you may have.

Data Pro Accounting Software, Inc.

727-803-1500

dpasupport@dpro.com