

# Avalara Professional Services™

Let the Avalara experts do all the work and maximize your investment with the Avalara Solution!

While Avalara does everything possible to make the use of AvaTax as easy as possible, each business has unique tax policies, business processes and ERP/Ecommerce systems for which AvaTax needs to be set up.

Avalara offers three options to perform this initial set-up:

- **Self-service:** For Clients with a simple business model and that prefer to save money by setting up the solution themselves, a Self Service option is available. With this approach, Clients will need to educate themselves on how to set-up AvaTax by viewing videos / reading documentation on Avalara's training center, map their business to AvaTax's configuration options, and perform these set-up procedures.
- **Assisted:** Beyond the Self Service option, the Assisted option provides Clients with access to a team of onboarding Consultants that provide general guidance at the beginning of the set-up and are available to answer questions that Clients may have during the set-up. The Client remains responsible for completing all set-up activities.
- **Guided:** For Clients that desire guidance throughout the set-up process or that have a more complex business model, the Avalara Professional Services team will guide Clients step by step through all the activities and will complete some of the more complex activities.

While it has the highest cost, Avalara recommends that Clients select the Guided option for the following reasons:

- Client will be live faster thus getting the benefits and ROI of the Avalara solution earlier, and for a smaller effort by Client resources.
- Client doesn't need to learn new product / configuration skills; Client can focus on running the business.
- The Avalara Professional Services consultants have successfully completed dozens of implementations. They will be able to share best practices based on their history with many other Clients. They can help identify issues and concerns that require specific tax advice and knowledge.
- Avalara Professional Services commits to a fixed fee for their services which guarantees the fees incurred to get live.



To learn more about these services, call Avalara today!

**Avalara™**

Get started with Avalara today.

Call 877-780-4848  
Visit: [www.avalara.com](http://www.avalara.com)

|                                    | Self Service   | Assisted   | Guided/Professional Services  |
|------------------------------------|--|--|---|
| <b>Summary</b>                     | Client performs set-up leveraging information on the help center.  | A consultant introduces the client to all the available help materials, explains how to leverage them and is then available to answer questions. Client still has ownership of all set-up activities.  | Avalara Professional Services guide Client step by step through Avalara's comprehensive Professional Services methodology detailed below. |
| <b>Support provided by Avalara</b> | None for the set-up activities – if Client runs into a product issue, Client can enter a ticket against Avalara Customer Support and responses will be provided based on the SLAs in your support package. | An onboarding consultant will typically spend a couple of hours to introduce the help materials, answer questions or redirect Client towards Avalara Customer Support for product issues and responses will be provided based on the SLAs in your support package. | As many hours as needed to complete the methodology detailed below.   |
| <b>Project Management</b>          | 100% owned by client.  | 100% owned by client.  | Avalara proposes an initial project plan and manages all tasks owned by Avalara.  |
| <b>Configurations</b>              | 100% owned by client.  | 100% owned by client.  | Avalara will provide full guidance on the configuration tasks listed in the methodology detailed below.                                   |
| <b>Testing</b>                     | 100% owned by client.  | 100% owned by client.  | Avalara will support Client with a test plan and issue resolution as listed in the methodology detailed below.                            |
| <b>End User Training</b>           | Materials available on the help center.  | Materials available on the help center.  | Avalara will provide training as listed in the methodology detailed below.  |

## What is the cost for the 3 different options?

The cost will grow with the level of support, i.e. the Self Service option is the cheapest, the Guided option is the most expensive. Pricing varies based on your business model. Key factors include: the nature of your business and industry, the number and nature of underlying business systems involved in the tax compliance process (e-commerce, order management, sales operations, ERP, reporting, etc.) and the overall complexity of the engagement.

See your designated Customer Account Manager or Sales Representative for a specific quote for your company.



Getting started with Avalara Professional Services is easy.

Call: 877-780-4848 | Visit: [www.avalara.com](http://www.avalara.com)

## Professional Services Methodology

Our Professional Services team will work with you to plan the milestones of your implementation of AvaTax. We work hand in hand with your project team to define and implement your overall tax and compliance solution. We are dedicated to your project success and provide training, testing support, and cutover planning.

Our project methodology is as follows:

### Planning and Design

- ❑ Solution Design and Project Planning – Avalara will confirm the solution design and project logistics with Client’s project team, including resources, roles and responsibilities, timing and deployment process. Avalara will propose a work plan and cutover plan for Client to incorporate into its overall project plan.
- ❑ Tax Logic Matrix / Tax Code Mapping – Avalara will conduct a workshop with Client’s tax department to develop a tax logic matrix to define the business rules to be used for tax exemption processing and assist with the identification of appropriate Avalara AvaTax system tax codes (tax categories) for use in product-based tax exemption processing.
- ❑ Environment Validation – Avalara will collaborate with Client’s project team on the solution environment paths to be used (test and production), including relevant configurations and functionality, system architecture and patch levels.
- ❑ Avalara Solution Set-up – Avalara will enable in its SaaS solution any instance of its products required to support this project.
- ❑ Avalara Integration (connector) – Avalara will work with Client to configure the connector between AvaTax and its ERP and Ecommerce system(s).

### Avalara Configurations

- ❑ AvaTax Entities – Avalara will guide Client in the configuration of Avalara AvaTax with the appropriate reporting entities.
- ❑ AvaTax Nexus – Avalara will guide Client through the configurations in Avalara AvaTax to enable tax collection in the various state and local taxing jurisdictions in which Client has identified a reporting requirement.
- ❑ AvaTax Product Tax Categories – Avalara will guide Client in the configurations to map Client’s tax drivers (product tax categories) to the appropriate Avalara System Tax Codes (tax categories) based on the Tax Logic Matrix.
- ❑ AvaTax Exemptions – Determine the handling of Client’s exemptions within the solution, and configure as such.
- ❑ CertCapture Entities – Avalara will provision CertCapture with the entities in which Client has identified a need for exemption management.



Getting started with Avalara Professional Services is easy.

Call: 877-780-4848 | Visit: [www.avalara.com](http://www.avalara.com)

- ❑ CertCapture Settings – Avalara will guide client on the Client Settings and Company Content within the CertCapture application.
- ❑ CertCapture Customers – Avalara will guide Client on the import/entry of customers in the appropriate format for Client's business requirements.
- ❑ Returns – Avalara will guide Client on the filing calendar setup process for up to five reporting jurisdictions.

## Solution Testing

- ❑ Testing – Avalara will assist Client in providing feedback on the Client's pre-defined test scripts for targeted tax testing and assist with evaluating test results. Avalara will provide support during the UAT process with issue resolution and troubleshooting related to the Avalara solutions.

## User Training and Documentation

- ❑ Avalara AvaTax User Training – Avalara will provide key user training on the use and maintenance of the new tax solution (two sessions: an initial introductory session to familiarize the key business users and project team members with the Avalara AvaTax functionality in the ERP and Ecommerce system(s) and an advanced session on the use and maintenance of the tax-related functionality before solution deployment).
- ❑ AvaTax CertCapture User Training: Avalara will provide key user training on the use and maintenance of the new exemption certificate tax solution (four sessions: an initial introductory session to familiarize the key business users and project team members with the functionality of CertCapture and follow up advanced sessions on customer maintenance, certificate requests, managing certificates and business process flow.
- ❑ AvaTax Returns User Training - Avalara will provide key user training on the returns monthly process to include assistance with the appropriate documentation for implementation and then follow up training on the monthly Tax Liability Worksheet review and approval processes.

## Solution Deployment

- ❑ Production Deployment - Avalara will participate in solution deployment activities including data migrations and cutover planning.
- ❑ Post-Production Support - Post-production support is provided for separately under Client's Avalara support contract.



Getting started with Avalara Professional Services is easy.

Call: 877-780-4848 | Visit: [www.avalara.com](http://www.avalara.com)

### About Avalara

Avalara, Inc., is a leading provider of cloud-based tax automation for businesses of all sizes. We help businesses achieve transactional tax compliance for sales and use, excise, communications, VAT and other tax types. Avalara's comprehensive, cloud-based solutions are fast, accurate, and easy to use with more than 500 hundred pre-built connectors into leading accounting, ERP, ecommerce and other business applications. Our Compliance Cloud™ platform helps

customers manage complicated and burdensome tax compliance obligations imposed by state, local, and other taxing authorities throughout the world. Each year, Avalara processes billions of indirect tax transactions for customers and users, files hundreds of thousands of tax compliance documents and tax returns, and manages millions of exemption certificates and other compliance related documents.