



Avalara AvaTax for Salesforce Billing

System Integration Guide

Release Date: 02/19/19
Product Release: v3.0

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Connector Overview

AvaTax for Salesforce Billing connector comprises the mention:

1. Address Validation on Account, Legal Entity.
2. Tax Calculation on Order, Invoice, Credit and Debit Note.
3. Multi-Entity features via Legal Entity.

The Connector is dependent on Salesforce Billing and AvaTax Mapper package.

Configuration

Integration point on Account Master

Sr. No.	Integration Page/ File/ Component	Address Validation	Test Connection	Trigger
1.	Account	Yes	No	NA
2.	Legal Entity	Yes	No	NA
3.	Tax Integration	No	Yes	AvalaraConfigurationUpdateTrigger
4.	Contact	Yes	No	NA

List of integrations on transaction pages

Sr. No.	Page	Entity/Use code	Manual Tax Calculation	Automatic Tax Calculation	Cancel Tax	Commit Tax
1.	Order	Yes	No	Yes	No	No
2.	Invoice	Yes	No	Yes	Yes	Yes
3.	Credit Note	Yes	Yes	No	Yes	Yes
4.	Debit Note	Yes	Yes	No	Yes	Yes

Object Mapping

Order Object

Sr. No.	Salesforce object	Salesforce field (API Name)	AvaTax Field	Details	Comment
Request Fields					
1.	Account	<ul style="list-style-type: none"> Name Id 	CustomerCode	<ul style="list-style-type: none"> Required: Yes Data Type: String Example: 0011Y00002GPqw1	<ul style="list-style-type: none"> Connector configuration.
		Exemption_Number__c	Exemption No.	<ul style="list-style-type: none"> Required: No Data Type: String Example: 1234	NA
		Entity_Use_Code__c	CustomerUsage Type	<ul style="list-style-type: none"> Required: No Data Type: String Example: A	NA
2.		Business_Identification_Number__c	Businessidentificationnumber	<ul style="list-style-type: none"> Required: No Data Type: String Example: 123456789	-
3.		Is_Seller_Importer_Of_Record__c	IsSellerImporterOfRecord	<ul style="list-style-type: none"> Required: No Data Type: Boolean Example: True/False	-
4.	-	System.Today()	docDate	<ul style="list-style-type: none"> Required: Yes Data Type: DateTime Example: 02/27/2018	NA
5.	Order Product	orderProduct.blng__LegalEntity__c	CompanyCode	<ul style="list-style-type: none"> Required: Yes Data Type: String Example: default	<ul style="list-style-type: none"> Custom field on Order Product for company code. Company Code and Legal entity name should match (Case sensitive) Legal Entity Name represents AvaTax Company Code in Billing Connector.

Sr. No.	Salesforce object	Salesforce field (API Name)	AvaTax Field	Details	Comment
6.	Order	<ul style="list-style-type: none"> Order.Name Order.Id 	DocCode	<ul style="list-style-type: none"> Required: Yes Data Type: String Example: 123	<ul style="list-style-type: none"> Dropdown Under Connector Configuration Allows to choose whether to pass Order Name or Id as DocCode.
7.	-	-	DetailLevel	<ul style="list-style-type: none"> Required: No Data Type: String Example: Tax	<ul style="list-style-type: none"> Set automatic through AvaTax as 'Tax.'
8.	Legal Entity	blng__LegalEntity__c.blng__Street1__c blng__LegalEntity__r.blng__Street2__c	<ul style="list-style-type: none"> ShipFrom Address Street1 Street2 	<ul style="list-style-type: none"> Required: Yes [Street2 is optional] Data Type: String Example: 900 winslow way e	<ul style="list-style-type: none"> Legal Entity address Fallback Organization address. [Origin Address]
		blng__LegalEntity__c.blng__City__c	<ul style="list-style-type: none"> ShipFrom Address City 	<ul style="list-style-type: none"> Required: Yes Data Type: String Example: BI	<ul style="list-style-type: none"> Legal Entity address Fallback Organization address. [Origin Address]
		blng__LegalEntity__c.blng__State__c	<ul style="list-style-type: none"> ShipFrom Address State 	<ul style="list-style-type: none"> Required: Yes Data Type: String Example: WA	<ul style="list-style-type: none"> Legal Entity address Fallback Organization address. [Origin Address]
		blng__LegalEntity__c.blng__Country__c	<ul style="list-style-type: none"> ShipFrom Address Country 	<ul style="list-style-type: none"> Required: Yes Data Type: String Example: US	<ul style="list-style-type: none"> Legal Entity address Fallback Organization address. [Origin Address]
		blng__LegalEntity__c.blng__ZipPostalCode__c	<ul style="list-style-type: none"> ShipFrom Address PostalCode 	<ul style="list-style-type: none"> Required: Yes Data Type: String Example: 98110	<ul style="list-style-type: none"> Legal Entity address Fallback Organization address. [Origin Address]

Sr. No.	Salesforce object	Salesforce field (API Name)	AvaTax Field	Details	Comment
11.	Account, Order	<ul style="list-style-type: none"> Order: Account Billing Address Order: Account Shipping Address Order: Bill To Contact Order: Ship To Contact Billing Account: Billing Address Billing Account: Shipping Address Billing Account: Bill to Contact 	ShipTo Address	<ul style="list-style-type: none"> Required: Yes Data Type: String Example: 900 winslow way e	<ul style="list-style-type: none"> Billing Package Configuration.
Line Item					
1.	Order Product	Quantity	Qty	<ul style="list-style-type: none"> Required: Yes Data Type: Decimal Example: 1	<ul style="list-style-type: none"> Order Product quantity
2.	Product	<ul style="list-style-type: none"> Product.ProductCode Product.Name 	ItemCode	<ul style="list-style-type: none"> Required: No Data Type: String Example: ABC	<ul style="list-style-type: none"> Product code missing, Product Name is used as ItemCode
3.	Order Product	Full-Term Net Unit Price	Amount	<ul style="list-style-type: none"> Required: Yes Data Type: Decimal Example: 100.00	<ul style="list-style-type: none"> Full-Term Net Unit Price Order Product line level
4.	Product	Product.Description	Description	<ul style="list-style-type: none"> Required: No Data Type: String Example: Product Description	<ul style="list-style-type: none"> Product description Order Product line level
5.	Order Product	<ul style="list-style-type: none"> Tax Street [Override] City [Override] State [Override] Zip [Override] Country [Override] 	Origin Address	-	<ul style="list-style-type: none"> Order Line Level Address Fields for ShipFrom Address Override.
Tax Code					
6.	Tax Treatment	blng__Tax_Code__c	TaxCode	<ul style="list-style-type: none"> Required: No Data Type: String Example: FR	<ul style="list-style-type: none"> Applied to Order Line Level

Sr. No.	Salesforce object	Salesforce field (API Name)	AvaTax Field	Details	Comment
Exemption					
7.	Account		Entity Use Code/Exemption	<ul style="list-style-type: none"> Required: No Data Type: String Example: FREIGHT / A	<ul style="list-style-type: none"> Custom Settings Tax_Exempt Custom field name to be provided in Tax_Exempt
Response fields					
8.	Order Product	Order_Item__c	Order Line Tax Breakup of AvaTax Field	-	<ul style="list-style-type: none"> Using custom object to display data. Please refer object definition for Order Line Tax Breakup__c as shown below.
		Invoice_Message__c	Messages	-	<ul style="list-style-type: none"> Using this custom field to display the invoice message received from service.

Order Line Tax Breakup

Sr. No.	Field API Name	Field Description	AvaTax Field	Comments
1.	Exempt_Amount__c	Exempt	exemptAmount	<ul style="list-style-type: none"> To store exempt amount received from AvaTax service
2.	Juris_Name__c	Jurisdiction	jurisName	<ul style="list-style-type: none"> To store jurisdiction name received from AvaTax service
3.	Juris_Type__c	Jurisdiction Type	jurisType	<ul style="list-style-type: none"> To store jurisdiction type received from AvaTax service
4.	Non_Taxable__c	Non-Taxable	nonTaxableAmount	<ul style="list-style-type: none"> To store nontaxable amount received from AvaTax service
5.	Order_Item__c	Order Item	-	-
6.	Rate__c	Rate %	rate	<ul style="list-style-type: none"> To store rate received from AvaTax service

Sr. No.	Field API Name	Field Description	AvaTax Field	Comments
1.	Tax__c	Tax	tax	<ul style="list-style-type: none"> To store tax received from AvaTax service
2.	Taxable_Amount__c	Taxable	taxableAmount	<ul style="list-style-type: none"> To store taxable amount received from AvaTax service
3.	Tax_Name__c	Tax Name	taxName	<ul style="list-style-type: none"> To store tax name received from AvaTax service

Invoice Object

Sr. No.	Salesforce object	Salesforce field (API Name)	AvaTax Field	Details	Comment
Request Fields					
1.	Account	<ul style="list-style-type: none"> Name Id 	CustomerCode	<ul style="list-style-type: none"> Required: Yes Data Type: String Example: 0011Y00002GPqw1	<ul style="list-style-type: none"> Connector configuration.
		Exemption_Number__c	Exemption No.	<ul style="list-style-type: none"> Required: No Data Type: String Example: 1234	NA
		Entity_Use_Code__c	CustomerUsage Type	<ul style="list-style-type: none"> Required: No Data Type: String Example: A	NA
2.	-	System.Today()	docDate	<ul style="list-style-type: none"> Required: Yes Data Type: DateTime Example: 02/27/2018	-
3.	Invoice Product	invoicwProduct.blng_LegalEntity__c	CompanyCode	<ul style="list-style-type: none"> Required: Yes Data Type: String Example: default	<ul style="list-style-type: none"> Copied from Order at the time of Invoice Generation
4.	Invoice	<ul style="list-style-type: none"> Invoice.Name Invoice.Id 	DocCode	<ul style="list-style-type: none"> Required: Yes Data Type: String Example: 123	<ul style="list-style-type: none"> Dropdown Under Connector Configuration Allows to choose whether to pass Order Name or Id as DocCode.
5.	-	-	DetailLevel	<ul style="list-style-type: none"> Required: No Data Type: String Example: Tax	<ul style="list-style-type: none"> Set automatic through AvaTax as 'Tax.'

Sr. No.	Salesforce object	Salesforce field (API Name)	AvaTax Field	Details	Comment
6.	Legal Entity	blng__LegalEntity__c .blng__Street1__c blng__LegalEntity__r .blng__Street2__c	<ul style="list-style-type: none"> • ShipFrom Address • Street1 • Street2 	<ul style="list-style-type: none"> • Required: Yes • [Street2 is optional] • Data Type: String Example: 900 winslow way e	<ul style="list-style-type: none"> • Legal Entity address • Fallback Organization address. [Origin Address]
		blng__LegalEntity__c .blng__City__c	<ul style="list-style-type: none"> • ShipFrom Address • City 	<ul style="list-style-type: none"> • Required: Yes • Data Type: String Example: BI	<ul style="list-style-type: none"> • Legal Entity address • Fallback Organization address. [Origin Address]
		blng__LegalEntity__c .blng__State__c	<ul style="list-style-type: none"> • ShipFrom Address • State 	<ul style="list-style-type: none"> • Required: Yes • Data Type: String Example: WA	<ul style="list-style-type: none"> • Legal Entity address • Fallback Organization address. [Origin Address]
		blng__LegalEntity__c .blng__Country__c	<ul style="list-style-type: none"> • ShipFrom Address • Country 	<ul style="list-style-type: none"> • Required: Yes • Data Type: String Example: US	<ul style="list-style-type: none"> • Legal Entity address • Fallback Organization address. [Origin Address]
		blng__LegalEntity__c .blng__ZipPostalCode__c	<ul style="list-style-type: none"> • ShipFrom Address • PostalCode 	<ul style="list-style-type: none"> • Required: Yes • Data Type: String Example: 98110	<ul style="list-style-type: none"> • Legal Entity address • Fallback Organization address. [Origin Address]
7.	Account, Order	<ul style="list-style-type: none"> • Order: Account Billing Address • Order: Account Shipping Address • Order: Bill To Contact • Order: Ship To Contact • Billing Account: Billing Address • Billing Account: Shipping Address • Billing Account: Bill to Contact 	ShipTo Address	<ul style="list-style-type: none"> • Required: Yes • Data Type: String Example: 900 winslow way e	<ul style="list-style-type: none"> • Billing Package Configuration.

Sr. No.	Salesforce object	Salesforce field (API Name)	AvaTax Field	Details	Comment
Line Item					
8.	Invoice Product	Quantity	Qty	<ul style="list-style-type: none"> Required: Yes Data Type: Decimal Example: 1	<ul style="list-style-type: none"> Invoice Product quantity
9.	Product	<ul style="list-style-type: none"> Product.ProductCode Product.Name 	ItemCode	<ul style="list-style-type: none"> Required: No Data Type: String Example: ABC	<ul style="list-style-type: none"> Product code missing, Product Name is used as ItemCode
10.	Invoice Product	Quantity	Amount	<ul style="list-style-type: none"> Required: Yes Data Type: Decimal Example: 100.00	<ul style="list-style-type: none"> SubTotal Invoice Product line level
11.	Product	Qty	Description	<ul style="list-style-type: none"> Required: No Data Type: String Example: Product Description	<ul style="list-style-type: none"> Product description Invoice Product line level
Tax Code					
12.	Tax Treatment	blng__Tax_Code__c	TaxCode	<ul style="list-style-type: none"> Required: No Data Type: String Example: FR	<ul style="list-style-type: none"> Applied to Invoice Line Level
Exemption					
13.	Account	-	Entity Use Code/Exemption	<ul style="list-style-type: none"> Required: No Data Type: String Example: FREIGHT / A	<ul style="list-style-type: none"> Custom Settings Tax_Exempt Custom field name to be provided in Tax_Exempt
Response fields					
14.	Invoice Line	Invoice_line__c	Invoice Line Tax Breakup of AvaTax Field		<ul style="list-style-type: none"> Using custom object to display data. Please refer object definition for Invoice Line Tax Breakup__c as shown below.
		Invoice_Message__c	Messages		<ul style="list-style-type: none"> Using this custom field to display the invoice message received from service.

Invoice Line Tax Breakup

Sr. No.	Field API Name	Field Description	AvaTax Field	Comments
1.	Exempt_Amount__c	Exempt	exemptAmount	• To store exempt amount received from AvaTax service
2.	Juris_Name__c	Jurisdiction	jurisName	• To store jurisdiction name received from AvaTax service
3.	Juris_Type__c	Jurisdiction Type	jurisType	• To store jurisdiction type received from AvaTax service
4.	Non_Taxable__c	Non-Taxable	nonTaxableAmount	• To store nontaxable amount received from AvaTax service
5.	Invoice_line__c	Invoice Line	-	-
6.	Rate__c	Rate %	rate	• To store rate received from AvaTax service
7.	Tax__c	Tax	tax	• To store tax received from AvaTax service
8.	Taxable_Amount__c	Taxable	taxableAmount	• To store taxable amount received from AvaTax service
9.	Tax_Name__c	Tax Name	taxName	• To store tax name received from AvaTax service

Credit Note Object

Sr. No.	Salesforce object	Salesforce field (API Name)	AvaTax Field	Details	Comment
Request Fields					
1.	Account	<ul style="list-style-type: none"> Name Id 	CustomerCode	<ul style="list-style-type: none"> Required: Yes Data Type: String Example: 0011Y00002GPqw1 	• Connector configuration.
		Exemption_Number__c	Exemption No.	<ul style="list-style-type: none"> Required: No Data Type: String Example: 1234 	NA
		Entity_Use_Code__c	CustomerUsageType	<ul style="list-style-type: none"> Required: No Data Type: String Example: A 	NA
2.	-	System.Today()	docDate	<ul style="list-style-type: none"> Required: Yes Data Type: DateTime Example: 02/27/2018 	-

Sr. No.	Salesforce object	Salesforce field (API Name)	AvaTax Field	Details	Comment
3.	Credit Note Line	CreditNote.blng__LegalEntity__c	CompanyCode	<ul style="list-style-type: none"> Required: Yes Data Type: String Example: default 	<ul style="list-style-type: none"> Custom field on Credit Note Product for company code. Company Code and Legal entity name should match (Case sensitive). Legal Entity Name represents AvaTax Company Code in Billing Connector.
4.	Credit Note	<ul style="list-style-type: none"> CreditNote.Name CreditNote.Id 	DocCode	<ul style="list-style-type: none"> Required: Yes Data Type: String Example: 123 	<ul style="list-style-type: none"> Dropdown Under Connector Configuration. Allows to choose whether to pass Order Name or Id as DocCode.
5.	-	-	DetailLevel	<ul style="list-style-type: none"> Required: No Data Type: String Example: Tax 	<ul style="list-style-type: none"> Set automatic through AvaTax as 'Tax.'
6.	Legal Entity	blng__LegalEntity__c. blng__Street1__c	<ul style="list-style-type: none"> ShipFrom Address Street1 Street2 	<ul style="list-style-type: none"> Required: Yes [Street2 is optional] Data Type: String Example: 900 winslow way e 	<ul style="list-style-type: none"> Legal Entity address Fallback Organization address <p>[Origin Address]</p>
		blng__LegalEntity__c. blng__City__c	<ul style="list-style-type: none"> ShipFrom Address City 	<ul style="list-style-type: none"> Required: Yes Data Type: String Example: BI 	<ul style="list-style-type: none"> Legal Entity address Fallback Organization address. <p>[Origin Address]</p>
		blng__LegalEntity__c. blng__State__c	<ul style="list-style-type: none"> ShipFrom Address State 	<ul style="list-style-type: none"> Required: Yes Data Type: String Example: WA 	<ul style="list-style-type: none"> Legal Entity address Fallback Organization address. <p>[Origin Address]</p>
		blng__LegalEntity__c. blng__Country__c	<ul style="list-style-type: none"> ShipFrom Address Country 	<ul style="list-style-type: none"> Required: Yes Data Type: String Example: US 	<ul style="list-style-type: none"> Legal Entity address Fallback Organization address. <p>[Origin Address]</p>
		blng__LegalEntity__c. blng__ZipPostalCode__c	<ul style="list-style-type: none"> ShipFrom Address PostalCode 	<ul style="list-style-type: none"> Required: Yes Data Type: String Example: 98110 	<ul style="list-style-type: none"> Legal Entity address Fallback Organization address. <p>[Origin Address]</p>

Sr. No.	Salesforce object	Salesforce field (API Name)	AvaTax Field	Details	Comment
7.	Credit Note Line, Credit Note, Account	Credit Note Line : Tax Address Tax Street Tax City Tax State Tax Country Credit Note : Tax Address Tax Street Tax City Tax State Tax Country Account : Shipping Address	ShipTo Address	<ul style="list-style-type: none"> Required: Yes Data Type: String Example: 900 winslow way e	-
Line Item					
8.	Credit Note Product	CreditNoteLine.quantity__c	Qty	<ul style="list-style-type: none"> Required: Yes Data Type: Decimal Example: 1	<ul style="list-style-type: none"> Credit Note Product quantity.
9.	Product	Product.ProductCode Product.Name	ItemCode	<ul style="list-style-type: none"> Required: No Data Type: String Example: ABC	<ul style="list-style-type: none"> Product code missing, Product Name is used as ItemCode.
10	Credit Note Product	CreditNoteLine.blng__Subtotal__c	Amount	<ul style="list-style-type: none"> Required: Yes Data Type: Decimal Example: 100.00	<ul style="list-style-type: none"> SubTotal Credit Note Product line level.
11.	Product	Product.Description	Description	<ul style="list-style-type: none"> Required: No Data Type: String Example: Product Description	<ul style="list-style-type: none"> Product description Credit Note Product line level.
Tax Code					
12.	Tax Treatment	blng__Tax_Code__c	TaxCode	<ul style="list-style-type: none"> Required: No Data Type: String Example: FR	<ul style="list-style-type: none"> Applied to Credit Note Line Level.

Sr. No.	Salesforce object	Salesforce field (API Name)	AvaTax Field	Details	Comment
Exemption					
13.	Account	-	Entity Use Code/Exemption	<ul style="list-style-type: none"> Required: No Data Type: String Example: FREIGHT / A	<ul style="list-style-type: none"> Custom Settings Tax_Exempt. Custom field name to be provided in Tax_Exempt..
Response fields					
14.	Credit Note Line	Credit_Note_line__c	Credit note Line Tax Breakup of AvaTax Field		<ul style="list-style-type: none"> Using custom object to display data. Please refer object definition for Credit Note Line Tax Breakup__c as shown below.
		Invoice_Message__c	Messages		<ul style="list-style-type: none"> Using this custom field to display the invoice message received from service.

Credit Note Line Tax Breakup

Sr. No.	Field API Name	Field Description	AvaTax Field	Comments
1.	Exempt_Amount__c	Exempt	exemptAmount	<ul style="list-style-type: none"> To store exempt amount received from AvaTax service.
2.	Juris_Name__c	Jurisdiction	jurisName	<ul style="list-style-type: none"> To store jurisdiction name received from AvaTax service.
3.	Juris_Type__c	Jurisdiction Type	jurisType	<ul style="list-style-type: none"> To store jurisdiction type received from AvaTax service.
4.	Non_Taxable__c	Non-Taxable	nonTaxableAmount	<ul style="list-style-type: none"> To store nontaxable amount received from AvaTax service.
5.	Credit_Note_line__c	Credit Note Line	-	-
6.	Rate__c	Rate %	rate	<ul style="list-style-type: none"> To store rate received from AvaTax service.
7.	Tax__c	Tax	tax	<ul style="list-style-type: none"> To store tax received from AvaTax service.
8.	Taxable_Amount__c	Taxable	taxableAmount	<ul style="list-style-type: none"> To store taxable amount received from AvaTax service..
9.	Tax_Name__c	Tax Name	taxName	<ul style="list-style-type: none"> To store tax name received from AvaTax service..

Debit Note Object

Sr. No.	Salesforce object	Salesforce field (API Name)	AvaTax Field	Details	Comment
Request Fields					
1.	Account	<ul style="list-style-type: none"> Name Id 	CustomerCode	<ul style="list-style-type: none"> Required: Yes Data Type: String Example: 0011Y00002GPqw1	<ul style="list-style-type: none"> Connector configuration.
		Exemption_Number__c	Exemption No.	<ul style="list-style-type: none"> Required: No Data Type: String Example: 1234	NA
		Entity_Use_Code__c	CustomerUsageType	<ul style="list-style-type: none"> Required: No Data Type: String Example: A	NA
2.	-	System.Today()	docDate	<ul style="list-style-type: none"> Required: Yes Data Type: DateTime Example: 02/27/2018	-
3.	Debit Note Line	DebitNote.billing__LegalEntity__c	CompanyCode	<ul style="list-style-type: none"> Required: Yes Data Type: String Example: default	<ul style="list-style-type: none"> Custom field on Debit Note Product for company code. Company Code and Legal entity name should match (Case sensitive). Legal Entity Name represents AvaTax Company Code in Billing Connector.
4.	Debit Note	<ul style="list-style-type: none"> DebitNote.Name DebitNote.Id 	DocCode	<ul style="list-style-type: none"> Required: Yes Data Type: String Example: 123	<ul style="list-style-type: none"> Dropdown Under Connector Configuration Allows to choose whether to pass Order Name or Id as DocCode.
5.	-	-	DetailLevel	<ul style="list-style-type: none"> Required: No Data Type: String Example: Tax	<ul style="list-style-type: none"> Set automatic through AvaTax as 'Tax.'

Sr. No.	Salesforce object	Salesforce field (API Name)	AvaTax Field	Details	Comment
6.	Legal Entity	blng__LegalEntity__c .blng__Street1__c blng__LegalEntity__r .blng__Street2__c	<ul style="list-style-type: none"> • ShipFrom Address • Street1 • Street2 	<ul style="list-style-type: none"> • Required: Yes • [Street2 is optional] • Data Type: String Example: 900 winslow way e	<ul style="list-style-type: none"> • Legal Entity address • Fallback Organization address. [Origin Address]
		blng__LegalEntity__c .blng__City__c	<ul style="list-style-type: none"> • ShipFrom Address • City 	<ul style="list-style-type: none"> • Required: Yes • Data Type: String Example: BI	<ul style="list-style-type: none"> • Legal Entity address • Fallback Organization address. [Origin Address]
		blng__LegalEntity__c .blng__State__c	<ul style="list-style-type: none"> • ShipFrom Address • State 	<ul style="list-style-type: none"> • Required: Yes • Data Type: String Example: WA	<ul style="list-style-type: none"> • Legal Entity address • Fallback Organization address. [Origin Address]
		blng__LegalEntity__c .blng__Country__c	<ul style="list-style-type: none"> • ShipFrom Address • Country 	<ul style="list-style-type: none"> • Required: Yes • Data Type: String Example: US	<ul style="list-style-type: none"> • Legal Entity address • Fallback Organization address. [Origin Address]
		blng__LegalEntity__c .blng__ZipPostalCode__c	<ul style="list-style-type: none"> • ShipFrom Address • PostalCode 	<ul style="list-style-type: none"> • Required: Yes • Data Type: String Example: 98110	<ul style="list-style-type: none"> • Legal Entity address • Fallback Organization address. [Origin Address]
7.	Debit Note Line	Debit Note Line : Tax Address Tax Street Tax City Tax State Tax Country Debit Note : Tax Address Tax Street Tax City Tax State Tax Country Account : Shipping Address	ShipTo Address	<ul style="list-style-type: none"> • Required: Yes • Data Type: String Example: 900 winslow way e	-

Sr. No.	Salesforce object	Salesforce field (API Name)	AvaTax Field	Details	Comment
Line Item					
8.	Debit Note Product	DebitNoteLine.quantity__c	Qty	<ul style="list-style-type: none"> Required: Yes Data Type: Decimal Example: 1	<ul style="list-style-type: none"> Debit Note Product quantity
9.	Product	<ul style="list-style-type: none"> Product.ProductCode Product.Name 	ItemCode	<ul style="list-style-type: none"> Required: No Data Type: String Example: ABC	<ul style="list-style-type: none"> Product code missing ,Product Name is use as ItemCode
10.	Debit Note Product	DebitNoteLine.blng_Subtotal__c	Amount	<ul style="list-style-type: none"> Required: Yes Data Type: Decimal Example: 100.00	<ul style="list-style-type: none"> SubTotal Debit Note Product line level
11.	Product	Product.Description	Description	<ul style="list-style-type: none"> Required: No Data Type: String Example: Product Description	<ul style="list-style-type: none"> Product description Debit Note Product line level
Tax Code					
12.	Tax Treatment	blng__Tax_Code__c	TaxCode	<ul style="list-style-type: none"> Required: No Data Type: String Example: FR	<ul style="list-style-type: none"> Applied to Debit Note Line Level
Exemption					
13.	Account	-	Entity Use Code/Exemption	<ul style="list-style-type: none"> Required: No Data Type: String Example: FREIGHT / A	<ul style="list-style-type: none"> Custom Settings Tax_Exempt Custom field name to be provided in Tax_Exempt
Response fields					
14.	Debit Note Line	Debit_Note_line__c	Debit Note Line Tax Breakup of AvaTax Field	-	<ul style="list-style-type: none"> Using custom object to display data. Please refer object definition for Debit Note Line Tax Breakup__c as shown below.
		Invoice_Message__c	Messages	-	<ul style="list-style-type: none"> Using this custom field to display the invoice message received from service.

Debit Note Line Tax Breakup

Sr. No.	Field API Name	Field Description	AvaTax Field	Comments
1.	Exempt_Amount__c	Exempt	exemptAmount	<ul style="list-style-type: none"> To store exempt amount received from AvaTax service.
2.	Juris_Name__c	Jurisdiction	jurisName	<ul style="list-style-type: none"> To store jurisdiction name received from AvaTax service.
3.	Juris_Type__c	Jurisdiction Type	jurisType	<ul style="list-style-type: none"> To store jurisdiction type received from AvaTax service.
4.	Non_Taxable__c	Non-Taxable	nonTaxableAmount	<ul style="list-style-type: none"> To store nontaxable amount received from AvaTax service.
5.	Debit_Note_line__c	Debit Note Line	-	-
6.	Rate__c	Rate %	rate	<ul style="list-style-type: none"> To store rate received from AvaTax service.
7.	Tax__c	Tax	tax	<ul style="list-style-type: none"> To store tax received from AvaTax service.
8.	Taxable_Amount__c	Taxable	taxableAmount	<ul style="list-style-type: none"> To store taxable amount received from AvaTax service.
9.	Tax_Name__c	Tax Name	taxName	<ul style="list-style-type: none"> To store tax name received from AvaTax service.

AvaTax Custom Fields

AvaTax Integration package includes custom fields as follows:

Sr. No.	Label	API Name	Data Type	Description
1.	AvaTax AccountNumber	AvaTaxAccountNumber__c	Text(255)	<ul style="list-style-type: none"> Account Number to connect to AvaTax Account.
2.	AvaTax License Key	AvaTaxLicenseKey__c	Text(255)	<ul style="list-style-type: none"> License Key to connect to AvaTax Account.
3.	Customer Code	CustomerCode__c	Picklist	<ul style="list-style-type: none"> Select option to send Account Id, Name as Customer Code.
4.	Doc Code	DocCode__c	Checkbox	<ul style="list-style-type: none"> Select option to send Transaction Id, Name as Document Code.
5.	Sandbox	TestMode__c	Checkbox	<ul style="list-style-type: none"> The default account type is production. This selection changes the account type from production to sandbox.
6.	Save transactions to AvaTax	Save_transactions_to_AvaTax__c	Checkbox	<ul style="list-style-type: none"> If checked, then the transaction will be posted to AvaTax.
7.	Validate Address	Validate_Address__c	Checkbox	<ul style="list-style-type: none"> Set the checkbox to true to enable Address Validation feature.

How to Extend AvaTax integration using AvaTax Mapper?

AvaTax for Salesforce Billing consists of two packages AvaTax Mapper and AvaTax Integration. The Integration package includes code and objects, like custom fields, page layouts while AvaTax mapper is an XML file which acts as a data layer between Salesforce and AvaTax Integration package.

For more information refer the Avalara AvaTax Mapper document.

Example 1: Currently from billing, you can pass Product Code or Product Name as item code. Here, you are going to pass OrderProduct Id as itemcode to Avalara service for the integration on Order object.

Follow the steps to meet the requirement:

1. Go to Tax Integration and select active Tax Integration.
2. Navigate to Notes and Attachment related list and download BillingConfig.xml file and save it on your desktop.
3. Open the BillingConfig.xml file, do the following modification, and save it.

Look for the following node and provide the name for an extender class:

```
<taxcalculation>

  <Order>
    .
    .
    .
    .
  </hooks>

    <overriderequestline>OverrideLineRequestExtender</overriderequestline>

</hooks>
```

4. Create new apex class with name [OverrideLineRequestExtender](#) (name should be same as provided in xml node).

```
global class OverrideLineRequestExtender implements IOverrideRequestLine {
  global void hookExtension(LineItemModel model, Id id) {
    //you can query any field from Order Item object and assign the values.
    (Here, you are passing Id of the line)

    model.itemCode = id;
  }
}
```

5. Navigate to Notes and Attachment related list and delete existing BillingConfig.xml file and upload the modified BillingConfig.xml file (Step 3).

6. Navigate to the Order and create a transaction to see the result.
7. You have successfully modified the AvaTax request.

Example 2: Currently, billing connector can only pass Account Id or Name as Customer Code to AvaTax Services.

If there is a business requirement to pass customerCode as some other field (other than Id and Name), then follow the steps to meet the requirement:

1. Go to Tax Integration and select active Tax Integration.
2. Navigate to Notes and Attachment related list and download BillingConfig.xml file and save it on your desktop.
3. Open the BillingConfig.xml file, do the following modification, and save it.

Look for the following node and provide the name for an extender class:

```
<taxcalculation>
  <Order>
    .
    .
    .
    .
  <hooks>
    <beforetaxcalculation>BeforeTaxCalculationExtender</beforetaxcalculation>
  </hooks>
```

4. Create new apex class with name `BeforeTaxCalculationExtender` (name should be same as provided in xml node).

```
global class BeforeTaxCalculationExtender implements IBeforeTaxCalculation {
  global void hookExtention(CreateTransactionModel model,
    Map<String,List<SObject>> headerResults) {
    // You can make use of headerResults (Header Query configured for respective
    object in BillingConfig.xml file) to pass the values or
    //You can query any object assign the values
    //It is assumed that you have selected Id as Customer Code in Tax Integration
    List<Account> listAcc = [SELECT xField from Account id = model.code];
    transResult.code = listAcc[0].xField;
  }
}
```

5. Navigate to Notes and Attachment related list and delete existing BillingConfig.xml file and upload the modified BillingConfig.xml file (Step 3).
6. Navigate to the Order and create a transaction to see the result.
7. You have successfully modified the AvaTax request.

Example 3: If there is a custom requirement of extracting tax details(taxbreakdown), and display it in a custom field.

Follow the steps to meet the requirement:

1. Go to Tax Integration and select active tax integration setting.
2. Navigate to Notes and Attachment related list and download BillingConfig.xml file and save it on your desktop.
3. Locate the object and search for UpdateMapping Node.
4. Open the BillingConfig.xml file, do the following modification, and save it.

Look for the following node and provide the name for an extender class:

```
<taxcalculation>
  <Order>
    ....
    <Line>
      <Queries>
        <OrderItem>
          ....
          <Mapping>
            ....
            </Mapping>
            <UpdateMapping>
              <SalesTaxDetails__c>GetLineDetails</SalesTaxDetails__c>
              <!-- node key = custom object field of Order Item and node value is
                your class name -->
            </UpdateMapping>
```

5. Create new apex class with name **GetLineDetails** (name should be same as provided in xml node).

```
global class GetLineDetails implements IUpdateTaxHelper {
  global String extension(TransactionModel transResult, Integer lineIndex){
    String lineDetails = '';
    for(TransactionLineDetailModel tlm : transResult.lines[lineIndex].details) {
      lineDetails = 'Tax Name : '+tlm.taxName + '\n'+'Juris Name ' +tlm.jurisName;
    }
    return lineDetails;
  }
}
```

6. Navigate to Notes and Attachment related list and delete existing BillingConfig.xml file and upload the modified BillingConfig.xml file (Step 3).
7. Navigate to the Order and create a transaction to see the result.
8. You have successfully modified the AvaTax request.