



Avalara AvaTax for Salesforce CPQ+

System Integration Document for Avalara AvaTax

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Acronyms and Abbreviations

CPQ	Configure Price Quote
IOR	Importer of Record
Qty	Quantity
UI	User Interface

Connector Overview

The AvaTax for Salesforce CPQ+ connector contains the following functionality:

1. Address Validation on Accounts, Contracts, Quotes, and Orders.
2. Tax Calculation on Contracts, Quotes, and Orders.
3. Multi Entity feature along with the batch support for Quotes and Contracts.
4. Exemption Number on Accounts.
5. Entity/Use code on Accounts, Contracts, Quotes, and Orders.

Connector Dependency

AvaTax for Salesforce CPQ+ is dependent on the Salesforce CPQ+ package and AvaTax Mapper package.

Note: The AvaTax for Salesforce CPQ+ connector is an extension package and AvaTax Mapper is the base package.

Configuration

List of Integration Points on Master Pages

Sr. No.	Integration Page/ File/ Component	Address Validation	Test Connection
1.	Account	Yes	No
2.	AvaTax Salesforce Integration Setting (Custom Settings)	Yes	Yes

Sr. No.	Page	Address Validation	Entity/ Use code	Location Code	Manual Tax Calculation	Automatic Tax Calculation	Cancel Tax	Trigger	Process Builder
1.	Contract	Yes	Yes	Yes (at Contract line level)	No	Yes	No	Yes	Yes
2.	Quote	Yes	Yes	Yes (at Quote line level)	Yes	Yes	No	No	Yes
3.	Order	Yes	Yes	Yes (at Order line level)	Yes	No	Yes	No	Yes

Object Mapping

Note:

If a mapping for the fields provided is unavailable in the CPQConfig XML file, then the AvaTax for Salesforce CPQ+ considers the values as per the description given in the below table. The values mentioned in the description of the below table are then passed to the AvaTax.

This comment is not applicable to AvaTax Salesforce Integration Settings[Custom Setting].

Contract

Sr. No.	Salesforce Object	Salesforce Field (API Name)	AvaTax Object	Details	Description
1.	Account	<ul style="list-style-type: none"> Account.AccountNumber Account.Name 	CustomerCode	<ul style="list-style-type: none"> Required: Yes Data Type: String Example: 0011Y00002GPqw1	<ul style="list-style-type: none"> If Customer Code is mapped in CPQConfig xml, then it passes the value which is mapped with the Customer Code to the AvaTax. If Customer Code mapping is unavailable in the CPQConfig xml, then it passes the Account Number as a Customer Code, and if the Account Number is unavailable, then it passes the Account Name as a Customer Code. The maximum field length is of 50 characters.
2.	N/A	System.today()	DocDate	<ul style="list-style-type: none"> Required: Yes Data Type: DateTime Example: 03/25/2019	<ul style="list-style-type: none"> AvaTax for Salesforce CPQ+ passes the current date as DocDate.
3.	a) AvaTax Salesforce Integration Setting b) MultiCompanyMapping__c	<ul style="list-style-type: none"> AVA_SFCPQ__Company_Code__c MultiCompany.CompanyCode__ 	CompanyCode	<ul style="list-style-type: none"> Required: No Data Type: String Example: Default	<ul style="list-style-type: none"> AvaTax Configuration Custom UI allows you to select the Company Code using the drop-down option. The selected Company Code is stored in the AvaTax for Salesforce CPQ+ Integration Setting. If MultiCompany is set up, then the AvaTax for Salesforce CPQ+ considers the Company Code available in the MultiCompanyMapping__c object for the selected subsidiary. If no Company Code is provided, then the default AvaTax Company Code is considered. The maximum field length is of 50 characters.

Sr. No.	Salesforce Object	Salesforce Field (API Name)	AvaTax Object	Details	Description
4.	Contract	ContractNumber	DocCode	<ul style="list-style-type: none"> Required: No Data Type: String Example: 123	<ul style="list-style-type: none"> If DocCode is mapped in the CPQConfig xml, then it passes the value which is mapped with the DocCode to the AvaTax. If DocCode mapping is unavailable in the CPQConfig xml, then it passes the contract number as a DocCode. The maximum field length is of 18 characters.
5.	N/A	N/A	debugLevel	<ul style="list-style-type: none"> Required: No Data Type: String Example: Normal	<ul style="list-style-type: none"> AvaTax for Salesforce CPQ+ is not passing any value. The default value is passed to the services.
6.	AvaTax Salesforce Integration Setting	AVA_SFCPQ__E_Street__c	ShipFrom Address	<ul style="list-style-type: none"> Required: Yes Data Type: String Example: 900 Winslow Way E, Bainbridge Island	<ul style="list-style-type: none"> AvaTax Configuration Custom UI allows you to enter the Origin Address Line 1. The maximum field length is of 50 characters.
7.	AvaTax Salesforce Integration Setting	AVA_SFCPQ__Street__2__c	ShipFrom Address	<ul style="list-style-type: none"> Required: Yes Data Type: String Example: 900 Winslow Way E, Bainbridge Island	<ul style="list-style-type: none"> AvaTax Configuration Custom UI allows you to enter the Origin Address Line 2. The maximum field length is of 100 characters.
8.	AvaTax Salesforce Integration Setting	AVA_SFCPQ__Street__3__c	ShipFrom Address	<ul style="list-style-type: none"> Required: Yes Data Type: String Example: 900 Winslow Way E, Bainbridge Island, WA	<ul style="list-style-type: none"> AvaTax Configuration Custom UI allows you to enter the Origin Address Line 3. The maximum field length is of 100 characters.
9.	AvaTax Salesforce Integration Setting	AVA_SFCPQ__F_City__c	ShipFrom Address	<ul style="list-style-type: none"> Required: Yes Data Type: String Example: Bainbridge	<ul style="list-style-type: none"> AvaTax Configuration Custom UI allows you to enter the Origin City address. The maximum field length is of 50 characters.
10.	AvaTax Salesforce Integration Setting	AVA_SFCPQ__G_State__c	ShipFrom Address	<ul style="list-style-type: none"> Required: Yes Data Type: String Example: WA	<ul style="list-style-type: none"> AvaTax Configuration Custom UI allows to enter the Origin State address. The maximum field length is of 3 characters.
11.	AvaTax Salesforce Integration Setting	AVA_SFCPQ__I_Country__c	ShipFrom Address	<ul style="list-style-type: none"> Required: Yes Data Type: String Example: US	<ul style="list-style-type: none"> AvaTax Configuration Custom UI allows you to select the Origin Country address from the drop-down.

Sr. No.	Salesforce Object	Salesforce Field (API Name)	AvaTax Object	Details	Description																
12.	AvaTax Salesforce Integration Setting	AVA_SFPCQ__H_PostalCode__c	ShipFrom Address	<ul style="list-style-type: none"> Required: Yes Data Type: String Example: 98110	<ul style="list-style-type: none"> AvaTax Configuration Custom UI allows you to enter the Origin Postal Code address. The maximum field length is of 11 characters. 																
13.	Account, Contract, SBQQ__Quote	<ul style="list-style-type: none"> Contract.BillingAddress Contract.ShippingAddress SBQQ__Quote.BillingAddress SBQQ__Quote.ShippingAddress Account.BillingAddress Account.ShippingAddress 	ShipTo Address	<ul style="list-style-type: none"> Required: Yes Data Type: String Example: 900 Winslow Way E, Bainbridge Island, WA 98110, US Table 1: Character Limit <table border="1" data-bbox="883 722 1120 1142"> <thead> <tr> <th>AvaTax Fields</th> <th>Character Limit</th> </tr> </thead> <tbody> <tr> <td>Line 1</td> <td>50</td> </tr> <tr> <td>Line 2</td> <td>100</td> </tr> <tr> <td>Line 3</td> <td>100</td> </tr> <tr> <td>City</td> <td>50</td> </tr> <tr> <td>State</td> <td>03</td> </tr> <tr> <td>Postal Code</td> <td>11</td> </tr> <tr> <td>Country</td> <td>03</td> </tr> </tbody> </table>	AvaTax Fields	Character Limit	Line 1	50	Line 2	100	Line 3	100	City	50	State	03	Postal Code	11	Country	03	<ul style="list-style-type: none"> If Shipping Address is available on Contract object, then it considers the Shipping address as Ship To Address, or else it considers the Billing Address of the Contract object. If both Shipping Address and Billing Address are unavailable on Contract object, then it considers the ShipTo Address of the Quote object. If ShipTo Address is unavailable on the Quote object, then it considers the Bill To Address of the Quote object. If Billing address and Shipping Address are unavailable on the Contract object, and also the Bill To Address and Ship To Address are unavailable on the Quote object, then it considers the Shipping Address of the Account object. If Shipping Address on Account object is also unavailable, then it considers the Billing Address of Account object for the tax calculation. Avalara AvaTax has provided the character limit for the address field. For character limit, please refer to the Table 1: Character Limit.
AvaTax Fields	Character Limit																				
Line 1	50																				
Line 2	100																				
Line 3	100																				
City	50																				
State	03																				
Postal Code	11																				
Country	03																				
14.	Account	AVA_MAPPER__Business_Identifier__c	businessIdentifierNo	<ul style="list-style-type: none"> Required: No Data Type: String Example: ABC123	<ul style="list-style-type: none"> It is used for VAT functionality. It is an AvaTax Mapper custom field. The entered value is passed as a Business Identification Number. The maximum field length is of 25 characters. 																

Sr. No.	Salesforce Object	Salesforce Field (API Name)	AvaTax Object	Details	Description
15.	Account	AVA_MAPPER__Exemption_Number__c	exemptionNo	<ul style="list-style-type: none"> Required: No Data Type: String Example: ABC123	<ul style="list-style-type: none"> It is an AvaTax Mapper custom field. The entered value is passed as an Exemption Number. The maximum field length is of 25 characters.
16.	Contract	AVA_SFPCPQ__Entity_Use_Code__c	customerUsageType	<ul style="list-style-type: none"> Required: No Data Type: String Example: ABC123	<ul style="list-style-type: none"> It is used for Entity/Use code functionality. This field is available on the Account object as an AvaTax Mapper field and on the Contract object as an AvaTax for Salesforce CPQ+ connector field. If a new contract record is created, or account record is changed on the transaction, AvaTax for Salesforce CPQ+ updates the value on the transaction from the Entity/Use code field of the Account object. If a value is available, then the AvaTax for Salesforce CPQ+ passes the value to the customerUsageType. The maximum field length is of 25 characters.
17.	Contract	AVA_SFPCPQ__Is_Seller_Importer_Of_Record__c	isSellerImporterOfRecord	<ul style="list-style-type: none"> Required: No Data Type: Boolean Example: True/False	<ul style="list-style-type: none"> It is used to pass Is Seller Importer Of Record value. This field is available on the Account object as an AvaTax Mapper field, and on the Contract object as an AvaTax for Salesforce CPQ+ field. If new contract record is created or the account record is changed on the transaction, then the AvaTax for Salesforce CPQ+ updates the value on the transaction from the Is Seller Importer Of Record field of the Account object.
Line Item					
18.	Subscription Product	Quantity	Qty	<ul style="list-style-type: none"> Required: Yes Data Type: Number(10,2) Example: 1.00	<ul style="list-style-type: none"> The quantity on the Subscription is passed as a line quantity to the AvaTax service.

Sr. No.	Salesforce Object	Salesforce Field (API Name)	AvaTax Object	Details	Description
19.	Product	<ul style="list-style-type: none"> Product.ProductCode Product.Name 	ItemCode	<ul style="list-style-type: none"> Required: No Data Type: String Example: AbC123	<ul style="list-style-type: none"> If the Product Code is missing, then the Product Name is used as ItemCode. The maximum field length is of 50 characters.
20.	Subscription Product	SBQQ__UnitCost__c	Amount	<ul style="list-style-type: none"> Required: Yes Data Type: Currency(12,2) Example: 100.00	<ul style="list-style-type: none"> The unit price on Subscription Product is passed as a line amount to the AvaTax service.
21.	Product	Product.Description	Description	<ul style="list-style-type: none"> Required: No Data Type: String Example: Product Description	<ul style="list-style-type: none"> AvaTax for Salesforce CPQ+ allows you to provide description for the product in the Product Description text box and it passes as a line description to the AvaTax service. The maximum field length is of 50 characters.
22.	Product	AVA_SFCPQ__Tax_Code__c	TaxCode	<ul style="list-style-type: none"> Required: No Data Type: String Example: FR	<ul style="list-style-type: none"> If a value is available in this field, then it passes as a Tax Code, or else it passes the blank value, and the service considers a default Tax Code - P0000000. The maximum field length is of 50 characters.
23.	Subscription Product	AVA_SFCPQ__Location_Code__c	Location Code	<ul style="list-style-type: none"> Required: No Data Type: String Example: LC	<ul style="list-style-type: none"> If a value is available, then it passes the location code, or else it passes the blank value at the line level. AvaTax for Salesforce CPQ+ provides the Location Code as a special feature at the line level.

Quote

Sr. No.	Salesforce Object	Salesforce Field (AP Name)	AvaTax Object	Details	Description
1.	Account	<ul style="list-style-type: none"> Account.AccountNumber Account.Name 	CustomerCode	<ul style="list-style-type: none"> Required: Yes Data Type: String Example: 0011Y00002GPqw1	<ul style="list-style-type: none"> If Customer Code is mapped in CPQConfig xml, then it passes the value which is mapped with the Customer Code to the AvaTax. If Customer Code mapping is unavailable in the CPQConfig xml, then it passes the Account Number as a Customer Code, and if the Account Number is unavailable, then it passes the Account Name as a Customer Code. The maximum field length is of 50 characters.
2.	N/A	System.today()	DocDate	<ul style="list-style-type: none"> Required: Yes Data Type: DateTime Example: 03/25/2019	<ul style="list-style-type: none"> AvaTax for Salesforce CPQ+ passes the current date as DocDate.
3.	a) AvaTax Salesforce Integration Setting b) MultiCompanyMapping__c	<ul style="list-style-type: none"> AVA_SFCPQ__Company_Code__c MultiCompany.CompanyCode__ 	CompanyCode	<ul style="list-style-type: none"> Required: No Data Type: String Example: default	<ul style="list-style-type: none"> AvaTax Configuration Custom UI allows you to select the Company Code using the drop-down option. The selected Company Code is stored in the AvaTax Salesforce Integration Setting. If MultiCompany is set up, then the AvaTax for Salesforce CPQ+ considers the Company Code available in the MultiCompanyMapping__c object for the selected subsidiary. If no Company Code is provided, then the default AvaTax Company Code is considered.

Sr. No.	Salesforce Object	Salesforce Field (API Name)	AvaTax Object	Details	Description
4.	SBQQ__Quote	Name	DocCod	<ul style="list-style-type: none"> Required: No Data Type: String Example: 123	<ul style="list-style-type: none"> If DocCode is mapped in the CPQConfig xml, then it passes the value which is mapped with the DocCode to the AvaTax. If DocCode mapping is unavailable in the CPQConfig xml, then it passes the Quote Name as a DocCode. The maximum field length is of 18 characters.
5.	N/A	N/A	debugLevel	<ul style="list-style-type: none"> Required: No Data Type: String Example: Normal	<ul style="list-style-type: none"> AvaTax for Salesforce CPQ+ is not passing any value. The default value is passed to the services.
6.	AvaTax Salesforce Integration Setting	AVA_SFCPQ__E_Street__c	ShipFrom Address	<ul style="list-style-type: none"> Required: Yes Data Type: String Example: 900 Winslow Way E, Bainbridge Island, WA	<ul style="list-style-type: none"> AvaTax Configuration Custom UI allows you to enter the Origin Address Line 1. The maximum field length is of 50 characters.
7.	AvaTax Salesforce Integration Setting	AVA_SFCPQ__Street_2__c	ShipFrom Address	<ul style="list-style-type: none"> Required: Yes Data Type: String Example: 900 Winslow Way E, Bainbridge Island, WA	<ul style="list-style-type: none"> AvaTax Configuration Custom UI allows you to enter the Origin Address Line 2. The maximum field length is of 100 characters.
8.	AvaTax Salesforce Integration Setting	AVA_SFCPQ__Street_3__c	ShipFrom Address	<ul style="list-style-type: none"> Required: Yes Data Type: String Example: 900 Winslow Way E, Bainbridge Island, WA	<ul style="list-style-type: none"> AvaTax Configuration Custom UI allows you to enter the Origin Address Line 3. The maximum field length is of 100 characters.
9.	AvaTax Salesforce Integration Setting	AVA_SFCPQ__F_City__c	ShipFrom Address	<ul style="list-style-type: none"> Required: Yes Data Type: String Example: Bainbridge	<ul style="list-style-type: none"> AvaTax Configuration Custom UI allows you to enter the Origin City address. The maximum field length is of 50 characters.
10.	AvaTax Salesforce Integration Setting	AVA_SFCPQ__G_State__c	ShipFrom Address	<ul style="list-style-type: none"> Required: Yes Data Type: String Example: WA	<ul style="list-style-type: none"> AvaTax Configuration Custom UI allows to enter the Origin State address. The maximum field length is of 3 characters.
11.	AvaTax Salesforce Integration Setting	AVA_SFCPQ__I_Country__c	ShipFrom Address	<ul style="list-style-type: none"> Required: Yes Data Type: String Example: US	<ul style="list-style-type: none"> AvaTax Configuration Custom UI allows you to select the Origin Country address from the drop-down.

Sr. No.	Salesforce Object	Salesforce Field (API Name)	AvaTax Object	Details	Description																
12.	AvaTax Salesforce Integration Setting	AVA_SFPCQ__H_PostalCode__c	ShipFrom Address	<ul style="list-style-type: none"> Required: Yes Data Type: String Example: 98110	<ul style="list-style-type: none"> AvaTax Configuration Custom UI allows you to enter the Origin Postal Code address. The maximum field length is of 11 characters. 																
13.	SBQQ__Quote, Account	<ul style="list-style-type: none"> SBQQ__Quote.BillingAddress SBQQ__Quote.ShippingAddress Account.BillingAddress Account.ShippingAddress 	ShipTo Address	<ul style="list-style-type: none"> Required: Yes Data Type: String Example: 900 Winslow Way E, Bainbridge Island, WA 98110, US Table 2: Character Limit <table border="1"> <thead> <tr> <th>AvaTax Fields</th> <th>Character Limit</th> </tr> </thead> <tbody> <tr> <td>Line 1</td> <td>50</td> </tr> <tr> <td>Line 2</td> <td>100</td> </tr> <tr> <td>Line 3</td> <td>100</td> </tr> <tr> <td>City</td> <td>50</td> </tr> <tr> <td>State</td> <td>03</td> </tr> <tr> <td>Postal Code</td> <td>11</td> </tr> <tr> <td>Country</td> <td>03</td> </tr> </tbody> </table>	AvaTax Fields	Character Limit	Line 1	50	Line 2	100	Line 3	100	City	50	State	03	Postal Code	11	Country	03	<ul style="list-style-type: none"> If Shipping Address is available on Quote object, then it considers the Shipping address as Ship To Address, or else it considers the Bill To Address of the Quote object. If both Shipping Address and Billing Address are unavailable on Quote object, then it considers the Shipping Address of the Account object. If Shipping Address is unavailable on the Account object, then it considers the Billing Address of the Account object for the tax calculation. Avalara AvaTax has provided the character limit for the address field. For character limit, please refer to the Table 2: Character Limit.
AvaTax Fields	Character Limit																				
Line 1	50																				
Line 2	100																				
Line 3	100																				
City	50																				
State	03																				
Postal Code	11																				
Country	03																				
14.	Account	AVA_MAPPER__Business_Identifier__c	businessIdentifierNo	<ul style="list-style-type: none"> Required: No Data Type: String Example: ABC123	<ul style="list-style-type: none"> It is used for VAT functionality. It is an AvaTax Mapper custom field. The entered value is passed as a Business Identifier Number. The maximum field length is of 25 characters. 																
15.	Account	AVA_MAPPER__Exemption_Number__c	exemptionNo	<ul style="list-style-type: none"> Required: No Data Type: String Example: ABC123	<ul style="list-style-type: none"> It is an AvaTax Mapper custom field. The entered value is passed as an Exemption Number. The maximum field length is of 25 characters. 																

Sr. No.	Salesforce Object	Salesforce Field (API Name)	AvaTax Object	Details	Description
16.	SBQQ__Quote	AVA_SFCPQ__Entity__Use_Code__c	customerUsageType	<ul style="list-style-type: none"> Required: No Data Type: String Example: ABC123	<ul style="list-style-type: none"> It is used for Entity/Use code functionality. This field is available on the Account as an AvaTax Mapper field and on the Quote object as an AvaTax for Salesforce CPQ+ connector field. If a new quote record is created, or account record is changed on the transaction, then the AvaTax updates the value on the transaction from the Entity/Use code of the Account object. If a value is available, then the AvaTax for Salesforce CPQ+ passes the value to the customerUsageType. The maximum field length is of 25 characters.
17.	SBQQ__Quote__c	AVA_SFCPQ__Is_Seller_Importer_Of_Record__c	isSellerImporterOfRecord	<ul style="list-style-type: none"> Required: No Data Type: Boolean Example: True/False	<ul style="list-style-type: none"> It is used to pass Is Seller Importer Of Record value. This field is available on the Accounts object as an AvaTax Mapper field and on the Quote object as an AvaTax for Salesforce CPQ+ field. If a new quote record is created, or account record is changed on the transaction, then the AvaTax for Salesforce CPQ+ updates the value on the transaction from the Is Seller Importer Of Record of the Accounts object.
Line Item					
18.	SBQQ__QuoteLine	Quantity	Qty	<ul style="list-style-type: none"> Required: Yes Data Type: Number(10,2) Example: 1.00	<ul style="list-style-type: none"> The quantity on SBQQ__QuoteLine is passed as a line quantity to the AvaTax service.
19.	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"> If the Product Code is missing, then the Product Name is used as ItemCode. The maximum field length is of 50 characters.

Sr. No.	Salesforce Object	Salesforce Field (API Name)	AvaTax Object	Details	Description
20.	SBQQ__QuoteLine Product	SBQQ__NetPrice__c	Amount	<ul style="list-style-type: none"> Required: Yes Data Type: Currency(12,2) Example: 100.00	<ul style="list-style-type: none"> The unit price on SBQQ__QuoteLine Product is passed as line amount to the AvaTax service.
21.	Product	Product.Description	Description	<ul style="list-style-type: none"> Required: No Data Type: String Example: Product Description	<ul style="list-style-type: none"> AvaTax for Salesforce CPQ+ allows you to provide description for the product in the Product Description text box and it passes as a line description to the AvaTax service. The maximum field length is of 50 characters.
22.	Product	Tax_Code__c	TaxCode	<ul style="list-style-type: none"> Required: No Data Type: String Example: FR	<ul style="list-style-type: none"> If a value is available in this field, then it passes as a tax code, or else it passes the blank value, and the service considers a default Tax Code - P0000000. The maximum field length is of 50 characters.
23.	SBQQ__QuoteLine	AVA_SFCPQ__Location_Code__c	Location Code	<ul style="list-style-type: none"> Required: No Data Type: String Example: LC	<ul style="list-style-type: none"> If a value is available, then it passes as a location code, or else it passes the blank value at the line level. AvaTax for Salesforce CPQ+ provides Location Code as a special feature at the line level.

Order

Sr. No.	Salesforce Object	Salesforce Field (API Name)	AvaTax Object	Details	Description
1.	Account	<ul style="list-style-type: none"> Account.AccountNumber Account.Name 	CustomerCode	<ul style="list-style-type: none"> Required: Yes Data Type: String Example: 0011Y00002GPqw1	<ul style="list-style-type: none"> If Customer Code is mapped in CPQConfig xml, then it passes the value which is mapped with the Customer Code to the AvaTax. If Customer Code mapping is unavailable in the CPQConfig xml, then it passes the Account Number as a Customer Code. If the Account Number is unavailable, then it passes the Account Name as a Customer Code. The maximum field length is of 50 characters.
2.	N/A	System.today()	DocDate	<ul style="list-style-type: none"> Required: Yes Data Type: DateTime Example: 03/25/2019	AvaTax for Salesforce CPQ+ passes the current date as DocDate.
3.	a) AvaTax Salesforce Integration Setting b) MultiCompanyMapping__c	<ul style="list-style-type: none"> AVA_SFCPQ__Company_Code__c MultiCompany.CompanyCode__c 	CompanyCode	<ul style="list-style-type: none"> Required: No Data Type: String Example: default	<ul style="list-style-type: none"> AvaTax Configuration Custom UI allows you to select the Company Code using the drop-down option. The selected Company Code is stored in the AvaTax Salesforce Integration Setting. If MultiCompany is set up, then the AvaTax for Salesforce CPQ+ considers the Company Code available in the MultiCompanyMapping__c object for the selected subsidiary. If no Company Code is provided, then the default AvaTax Company Code is considered. The maximum field length is of 50 characters.

Sr. No.	Salesforce Object	Salesforce Field (API Name)	AvaTax Object	Details	Description
4.	Order	OrderNumber	DocCode	<ul style="list-style-type: none"> Required: No Data Type: String Example: AbC123	<ul style="list-style-type: none"> If DocCode is mapped in the CPQConfig xml, then it passes the value which is mapped with the DocCode to the AvaTax. If DocCode mapping is unavailable in the CPQConfig xml, then it passes the Order Number as a DocCode. The maximum field length is of 18 characters.
5.	N/A	N/A	debugLevel	<ul style="list-style-type: none"> Required: No Data Type: String Example: Normal	<ul style="list-style-type: none"> AvaTax for Salesforce CPQ+ is not passing any value. The default value is passed to the services.
6.	AvaTax Salesforce Integration Setting	AVA_SFCPQ__E_Street__c	ShipFrom Address	<ul style="list-style-type: none"> Required: Yes Data Type: String Example: 900 Winslow Way E, Bainbridge Island, WA	<ul style="list-style-type: none"> AvaTax Configuration Custom UI allows you to enter the Origin Address Line 1. The maximum field length is of 50 characters.
7.	AvaTax Salesforce Integration Setting	AVA_SFCPQ__Street_2__c	ShipFrom Address	<ul style="list-style-type: none"> Required: Yes Data Type: String Example: 900 Winslow Way E, Bainbridge Island, WA	<ul style="list-style-type: none"> AvaTax Configuration Custom UI allows you to enter the Origin Address Line 2. The maximum field length is of 100 characters.
8.	AvaTax Salesforce Integration Setting	AVA_SFCPQ__Street_3__c	ShipFrom Address	<ul style="list-style-type: none"> Required: Yes Data Type: String Example: 900 Winslow Way E, Bainbridge Island, WA	<ul style="list-style-type: none"> AvaTax Configuration Custom UI allows you to enter the Origin Address Line 3. The maximum field length is of 100 characters.
9.	AvaTax Salesforce Integration Setting	AVA_SFCPQ__City__c	ShipFrom Address	<ul style="list-style-type: none"> Required: Yes Data Type: String Example: Bainbridge	<ul style="list-style-type: none"> AvaTax Configuration Custom UI allows you to enter the Origin City address. The maximum field length is of 50 characters.
10.	AvaTax Salesforce Integration Setting	AVA_SFCPQ__State__c	ShipFrom Address	<ul style="list-style-type: none"> Required: Yes Data Type: String Example: WA	<ul style="list-style-type: none"> AvaTax Configuration Custom UI allows to enter the Origin State address. The maximum field length is of 3 characters.
11.	AvaTax Salesforce Integration Setting	AVA_SFCPQ__Country__c	ShipFrom Address	<ul style="list-style-type: none"> Required: Yes Data Type: String Example: US	<ul style="list-style-type: none"> AvaTax Configuration Custom UI allows you to select the Origin Country address from the drop-down.

Sr. No.	Salesforce Object	Salesforce Field (API Name)	AvaTax Object	Details	Description																
12.	AvaTax Salesforce Integration Setting	AVA_SFCPQ__H_PostalCode__c	ShipFrom Address	<ul style="list-style-type: none"> Required: Yes Data Type: String Example: 98110	<ul style="list-style-type: none"> AvaTax Configuration Custom UI allows you to enter the Origin Postal Code address. The maximum field length is of 11 characters. 																
13.	Order, Account	<ul style="list-style-type: none"> Order.BillingAddress Order.ShippingAddress Account.BillingAddress Account.ShippingAddress 	ShipTo Address	<ul style="list-style-type: none"> Required: Yes Data Type: String Example: 900 Winslow Way E, Bainbridge Island, WA 98110, US Table 3: Character Limit <table border="1" style="margin-left: 20px;"> <thead> <tr> <th>AvaTax Fields</th> <th>Character Limit</th> </tr> </thead> <tbody> <tr> <td>Line 1</td> <td>50</td> </tr> <tr> <td>Line 2</td> <td>100</td> </tr> <tr> <td>Line 3</td> <td>100</td> </tr> <tr> <td>City</td> <td>50</td> </tr> <tr> <td>State</td> <td>03</td> </tr> <tr> <td>Postal Code</td> <td>11</td> </tr> <tr> <td>Country</td> <td>03</td> </tr> </tbody> </table>	AvaTax Fields	Character Limit	Line 1	50	Line 2	100	Line 3	100	City	50	State	03	Postal Code	11	Country	03	<ul style="list-style-type: none"> If a Shipping Address is available on Order object, then it considers the Shipping Address as a Ship To Address, or else it considers the Billing Address of the Order object. If both Shipping Address and Billing address are unavailable on Order object, then it considers the Shipping Address of the Account object. If Shipping Address is unavailable on the Account object, then it considers the Billing Address of the Account object for the tax calculation. Avalara AvaTax has provided the character limit for the address field. For character limit, please refer to the Table 3: Character Limit.
AvaTax Fields	Character Limit																				
Line 1	50																				
Line 2	100																				
Line 3	100																				
City	50																				
State	03																				
Postal Code	11																				
Country	03																				
14.	Account	AVA_MAPPER__Business_Identification_Number__c	businessIdentificationNo	<ul style="list-style-type: none"> Required: No Data Type: String Example: ABC123	<ul style="list-style-type: none"> It is used for VAT functionality. It is an AvaTax Mapper custom field. The entered value is passed as a Business Identification Number. The maximum field length is of 25 characters. 																
15.	Account	AVA_MAPPER__Exemption_Number__c	exemptionNo	<ul style="list-style-type: none"> Required: No Data Type: String Example: ABC123	<ul style="list-style-type: none"> It is an AvaTax Mapper custom field. The entered value is passed as an Exemption Number. The maximum field length is of 25 characters. 																

Sr. No.	Salesforce Object	Salesforce Field (API Name)	AvaTax Object	Details	Description
16.	Order	AVA_SFCPQ__Entity_Use_Code__c	customerUsageType	<ul style="list-style-type: none"> Required: No Data Type: String Example: ABC123	<ul style="list-style-type: none"> It is used for Entity/Use code functionality. This field is available on the Account object as an AvaTax Mapper field and on the Order object as an AvaTax for Salesforce CPQ+ connector field. If a new order record is created, or account record is changed on the transaction, AvaTax for Salesforce CPQ+ updates the value on the transaction from the Entity/Use code of the Accounts object. If a value is available, then the AvaTax for Salesforce CPQ+ passes the value to the customerUsageType. The maximum field length is of 25 characters.
17.	Order	AVA_SFCPQ__Is_Seller_Importer_Of_Record__c	isSellerImporterOfRecord	<ul style="list-style-type: none"> Required: No Data Type: Boolean Example: True/False	<ul style="list-style-type: none"> It is used to pass Is Seller Importer Of Record value. This field is available on the Accounts object as an AvaTax Mapper field and on the Order object as an AvaTax for Salesforce CPQ+ field. If a new order record is created or account record is changed on the transaction, AvaTax for Salesforce CPQ+ updates the value on the transaction from the Is Seller Importer Of Record of the Accounts object.
Line Item					
18.	Order	Quantity	Qty	<ul style="list-style-type: none"> Required: Yes Data Type: Number(10,2) Example: 1.00	<ul style="list-style-type: none"> The quantity on the Order item is passed as a line quantity to the AvaTax service.
19.	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"> If the Product Code is missing, then the Product Name is used as ItemCode. The maximum field length is of 50 characters.

Sr. No.	Salesforce Object	Salesforce Field (API Name)	AvaTax Object	Details	Description
20.	Order Product	Unit Price	Amount	<ul style="list-style-type: none"> Required: Yes Data Type: Currency(12,2) Example: 100.00	<ul style="list-style-type: none"> The unit price on Order Product is passed as a line amount to the AvaTax service.
21.	Product	Product.Description	Description	<ul style="list-style-type: none"> Required: No Data Type: String Example: Product Description	<ul style="list-style-type: none"> AvaTax for Salesforce CPQ+ allows you to provide description for the product in the Product Description text box and it passes as a line description to the AvaTax service. The maximum field length is of 50 characters.
22.	Product	Tax_Code__c	TaxCode	<ul style="list-style-type: none"> Required: No Data Type: String Example: FR	<ul style="list-style-type: none"> If a value is available in this field, it passes as a tax code, or else it passes the blank value, and the service considers a default Tax Code - P0000000. The maximum field length is of 50 characters.
23.	Order Product	AVA_SFCPQ__Location_Code__c	Location Code	<ul style="list-style-type: none"> Required: No Data Type: String Example: LC	<ul style="list-style-type: none"> If a value is available, then it passes as a location code, or else it passes the blank value at the line level. AvaTax for Salesforce CPQ+ provides the Location Code as a special feature at the line level.

AvaTax Custom Fields

AvaTax Custom Settings

- The user receives a configure link on the installed package section after the connector gets installed.
- Click on Configure, to open the AvaTax Configuration Custom UI.
- Enter the AvaTax credentials, and then click Save.
- The Custom Settings stores all the values in the background.

Sr. No.	Label	API Name	Data Type	Description
1.	Account ID	AVA_SFCPQ__A_AccountNumber__c	Text(10)	<ul style="list-style-type: none"> • Provided a text box to enter the account ID.
2.	City	AVA_SFCPQ__F_City__c	Text(50)	<ul style="list-style-type: none"> • Provided a text box to enter the origin city address.
3.	Company Code	AVA_SFCPQ__D_CompanyCode__c	Text(100)	<ul style="list-style-type: none"> • Provided a drop down from which a user selects the company code. • The company code use in Quote and Order for the tax calculation.
4.	Enable AvaTax Tax Calculation	AVA_SFCPQ__J_EnableTaxCalculation__c	Checkbox	<ul style="list-style-type: none"> • Provided a checkbox to enable the AvaTax tax calculation service. • If checked, then the AvaTax Salesforce CPQ+ calculates the tax on the Quote, and Order transaction. • By default, the checkbox is unchecked.
5.	License Key	AVA_SFCPQ__B_LicenseKey__c	Text(50)	<ul style="list-style-type: none"> • Provided a text box to enter the License Key.
6.	Street	AVA_SFCPQ__E_Street__c	Text(100)	<ul style="list-style-type: none"> • Provided a text box to enter the Origin Address Line 1.
7.	Line 2	AVA_SFCPQ__Street_2__c	Text(255)	<ul style="list-style-type: none"> • Provided a text box to enter the Origin Address Line 2.
8.	Line 3	AVA_SFCPQ__Street_3__c	Text(255)	<ul style="list-style-type: none"> • Provided a text box to enter the Origin Address Line 3.
9.	State	AVA_SFCPQ__G_State__c	Text(50)	<ul style="list-style-type: none"> • Provided a text box to enter the Origin State Address.
10.	Postal Code	AVA_SFCPQ__H_PostalCode__c	Text(11)	<ul style="list-style-type: none"> • Provided a text box to enter the Origin Postal Code Address.
11.	Country	AVA_SFCPQ__I_Country__c	Text(50)	<ul style="list-style-type: none"> • Provided a text box to enter the Origin Country Address.

12.	Sandbox	AVA_SFCPQ__C_Sandbox__c	Checkbox	<ul style="list-style-type: none"> • Provided a checkbox to select the AvaTax credentials mode (Production/ Sandbox). • If checked, then the AvaTax for Salesforce CPQ+ uses the Sandbox service URL for GetTax and Address Validation services. • If unchecked, then the AvaTax for Salesforce CPQ+ uses the Production service URL for GetTax and Address Validation services. • By default, the checkbox is unchecked.
13.	Save transactions to AvaTax	AVA_SFCPQ__JA_SaveTransactionsToAvaTax__c	Checkbox	<ul style="list-style-type: none"> • Provided a checkbox to select and saves transaction to the AvaTax Update. • If checked, then the AvaTax for Salesforce CPQ+ uses the sandbox service URL for GetTax and Address Validation services.
14.	Validate Addresses	AVA_SFCPQ__K_EnableAddressValidation__c	Checkbox	<ul style="list-style-type: none"> • Provided a text box to enable the Address Validation services.
15.	Disable AvaTax Triggers	AVA_SFCPQ__Disable_AvaTax_Triggers__c	Checkbox	<ul style="list-style-type: none"> • Provided a checkbox to disable all the triggers of the AvaTax for Salesforce CPQ+. • Enable the triggers by deselecting the checkbox, so that the AvaTax for Salesforce CPQ+ performs as expected.

AvaTax Custom Fields on AVA_SFCPQ__AdditionalSettings__c

Sr. No.	Label	API Name	Data Type	Description
1.	Custom Field API Name	AVA_SFCPQ__CustomFieldApiName__c	Text (40)	<ul style="list-style-type: none"> • If you have your custom field for MultiCompany mapping, then provide the API name of the custom field, to which the custom object is mapped.
2.	Custom Object API Name	AVA_SFCPQ__CustomObjectApiName__c	Text(40)	<ul style="list-style-type: none"> • If you have your custom field for MultiCompany mapping, then provide the API name of the custom object, to which the custom field is mapped.

AvaTax Custom Fields on SBQQ_Quote

Sr. No.	Label	API Name	Data Type	Description
1.	AvaTax Message	AVA_SFCPQ__AvaTaxMessage__c	Text(255) Example: Tax Amount is Outdated	<ul style="list-style-type: none"> It displays the tax calculation message.
2.	Tax Calculation Status	AVA_SFCPQ__Tax_Calculation_Status__c	Formula (Text)	<ul style="list-style-type: none"> It displays the icon sync with AvaTax message <ol style="list-style-type: none"> Warning Success Loader Error
3.	Sales Tax Amount	AVA_SFCPQ__SalesTaxAmount__c	Currency(12, 2)	<ul style="list-style-type: none"> It displays the total tax amount returned by the service.
4.	Calculate Tax	AVA_SFCPQ__Quote_AutomateTaxCalculation__c	Checkbox	<ul style="list-style-type: none"> Select the checkbox to perform automatic tax calculation.
5.	Entity Use Code	AVA_SFCPQ__Entity_Use_Code__c	Lookup	<ul style="list-style-type: none"> It is used for Entity/Use code functionality. This field is available on the Account object as an AvaTax Mapper field and on the Quote object as an AvaTax for Salesforce CPQ+ connector field. If a new quote record is created, or account record is changed on the transaction, AvaTax for Salesforce CPQ+ updates the value on the transaction from the Entity/Use code of the Accounts. If a value is available, then the AvaTax for Salesforce CPQ+ passes the value to the customerUsageType. The maximum field length is of 25 characters.
6.	Is Seller Importer of Record	AVA_SFCPQ__Is_Seller_Importer_Of_Record__c	Checkbox	<ul style="list-style-type: none"> It is used to pass Is Seller Importer Of Record value. This field is available on the Accounts as an AvaTax Mapper field and on the transaction as an AvaTax for Salesforce CPQ+ field. If a new quote record is created or account record is changed on the transaction, then the AvaTax Salesforce CPQ+ updates the value on the transaction from the Is Seller Importer Of Record of the Accounts object.

Sr. No.	Label	API Name	Data Type	Description
7.	Invoice Message	AVA_SFCPQ__Invoice_Message__c	Long Text Area(32768)	<ul style="list-style-type: none"> It displays the invoice message received from the AvaTax service.

AvaTax Custom Fields on SBQQ_QuoteLine__C

Sr. No.	Label	API Name	Data Type	Description
1.	Sales Tax Amount	AVA_SFCPQ__TaxAmount__c	Currency(12, 2)	<ul style="list-style-type: none"> It displays the Tax Amount returned by the service.
2.	Sales Tax Details	AVA_SFCPQ__SalesTaxDetails__c	Long Text Area(32768)	<ul style="list-style-type: none"> It displays the Tax Details returned by the service.
3.	Location Code	AVA_SFCPQ__Location_Code__c	Text(50)	<ul style="list-style-type: none"> Location Code at line level is sent to AvaTax service.

AvaTax Custom Fields on Order

Sr. No.	Label	API Name	Data Type	Description
1.	AvaTax Message	AVA_SFCPQ__AvaTaxMessage__c	Text(255) Example: Tax Amount is Outdated	<ul style="list-style-type: none"> It displays the tax calculation message.
2.	Entity Use Code	AVA_SFCPQ__Entity_Use_Code__c	Lookup	<ul style="list-style-type: none"> It is used for Entity/Use code functionality. This field is available on the Accounts as an AvaTax Mapper field and on the Orders as an AvaTax for Salesforce CPQ+ connector field. If a new order record is created, or account record is changed on the transaction, AvaTax Salesforce CPQ+ updates the value on the transaction from the Entity/Use code of the Accounts object. If a value is available, then the AvaTax for Salesforce CPQ+ passes the value to the customerUsageType. The maximum field length is of 25 characters.

Sr. No.	Label	API Name	Data Type	Description
3.	Is Seller Importer of Record	AVA_SFCPQ__Is_Seller_Importer_Of_Record__c	Checkbox	<ul style="list-style-type: none"> It is used to pass Is Seller Importer Of Record value. This field is available on the Accounts object as an AvaTax Mapper field and on the transaction as an AvaTax for Salesforce CPQ+ field. If a new order record is created or account record is changed on the transaction, then the AvaTax Salesforce CPQ+ updates the value on the transaction from the Is Seller Importer Of Record of the Accounts object.
4.	Sales Tax Amount	AVA_SFCPQ__Sales_Tax_Amount__c	Currency (12, 2)	<ul style="list-style-type: none"> It displays the total tax amount returned by the service.
5.	Tax Calculation Status	AVA_SFCPQ__Tax_Calculation_Status__c	Formula (Text)	<ul style="list-style-type: none"> It displays the icon sync with AvaTax Message. <ul style="list-style-type: none"> I. Warning II. Success III. Loader IV. Error
6.	Invoice Message	AVA_SFCPQ__Invoice_Message__c	Long Text Area (32768)	<ul style="list-style-type: none"> It displays the invoice message received from the AvaTax service.

AvaTax Custom Fields on OrderProduct

Sr. No.	Label	API Name	Data Type	Description
1.	Sales Tax Amount	AVA_SFCPQ__TaxAmount__c	Currency (12, 2)	<ul style="list-style-type: none"> It displays the tax amount returned by the service.
2.	Sales Tax Details	AVA_SFCPQ__SalesTaxDetails__c	Long Text Area (32768)	<ul style="list-style-type: none"> It displays the tax details returned by the service.
3.	Location Code	AVA_SFCPQ__Location_Code__c	Text (50)	<ul style="list-style-type: none"> Location Code at line level is sent to AvaTax service.

AvaTax Custom Fields on Contract

Sr. No.	Label	API Name	Data Type	Description
1.	AvaTax Message	AVA_SFCPQ__AvaTaxMessage__c	Text (255) Example: Tax Amount is Outdated	<ul style="list-style-type: none"> It displays the tax calculation Message.
2.	Tax Calculation Status	AVA_SFCPQ__Tax_Calculation_Status__c	Formula (Text)	<ul style="list-style-type: none"> It displays the icon sync with AvaTax Message. <ol style="list-style-type: none"> Warning Success Loader Error
3.	Sales Tax Amount	AVA_SFCPQ__Sales_Tax_Amount__c	Currency (12, 2)	<ul style="list-style-type: none"> It displays the total tax amount that is returned by the service.
4.	Entity Use Code	AVA_SFCPQ__Entity_Use_Code__c	Lookup	<ul style="list-style-type: none"> It is used for Entity/Use code functionality. This field is available on the Accounts object as an AvaTax Mapper field and on the Contracts object as an AvaTax for Salesforce CPQ+ connector field. If a new contract record is created or account record is changed on the transaction, then the AvaTax for Salesforce CPQ+ updates the value on the transaction from the Entity/Use code of the Accounts object. If a value is available, then the AvaTax Salesforce CPQ+ passes the value to the customerUsageType. The maximum field length is of 25 characters.
5.	Is Seller Importer of Record	AVA_SFCPQ__Is_Seller_Importer_Of_Record__c	Checkbox	<ul style="list-style-type: none"> It is used to pass Is Seller Importer Of Record value. This field is available on the Accounts object as an AvaTax Mapper field and on the transaction as an AvaTax for Salesforce CPQ+ field. If a new contract record is created or account record is changed on the transaction, then the AvaTax for Salesforce CPQ+ updates the value on the transaction from the Is Seller Importer Of Record Accounts object.
6.	Invoice Message	AVA_SFCPQ__Invoice_Message__c	Long Text Area(32768)	<ul style="list-style-type: none"> It displays the invoice message received from the AvaTax service.

AvaTax Custom Fields on SBQQ__Subscription__c

Sr. No.	Label	API Name	Data Type	Description
1.	Sales Tax Amount	AVA_SFCPQ__TaxAmount__c	Currency(12, 2)	<ul style="list-style-type: none"> It displays the tax amount returned by the service.
2.	Sales Tax Details	AVA_SFCPQ__SalesTaxDetails__c	Long Text Area(32768)	<ul style="list-style-type: none"> It displays the tax details returned by the service.
3.	Location Code	AVA_SFCPQ__Location_Code__c	Text(50)	<ul style="list-style-type: none"> Location Code at line level is sent to AvaTax service.

AvaTax Customer Fields on Asset

Sr. No.	Label	API Name	Data Type	Description
1.	Sales Tax Amount	AVA_SFCPQ__TaxAmount__c	Currency(12, 2)	<ul style="list-style-type: none"> It displays the tax amount returned by the service.

Process Builder

Contract

Contract: Automatic Tax Calculation

The process builder is used for the automatic tax calculation functionality. The AvaTax for Salesforce CPQ+ is setting messages in the AvaTax fields and calls out the AvaTax Apex method.

- a. **Event:** Created or Edited
- b. **Criteria for this Action Group:** When a Calculate Tax (AVA_SFCPQ__Calculate_Tax__c) checkbox is checked
- c. **Immediate Actions:**
 - I. Update values in the AvaTax Custom fields:
AvaTax Message = Auto Sales Tax Calc Triggered - Refresh Your Browser For Result
Calculate Tax = Uncheck the checkbox
 - II. Call the Apex Method:
Class: AVA_SFCPQ__CalculateContractController
Apex Variables: docId - Field Reference - [Contract].Id

Contract: AvaTax Message Upgrade - Clear Header AvaTax Custom Fields

The process builder is used specifically to clear the Contract AvaTax header custom fields while cloning the transaction. The AvaTax does not copy the AvaTax data to the cloned transaction without calculating the tax.

- a. **Event:** Created
- b. **Criteria for this Action Group:** No criteria—just execute the actions
- c. **Immediate Actions:** Update AvaTax custom field values.

- I. AvaTax Message = NULL
- II. Invoice Message = NULL
- III. Sales Tax = NULL

Subscription: AvaTax Message Upgrade - Clear AvaTax Custom Field Value

The process builder is used to clear the Subscription AvaTax line level custom fields while cloning the transaction. The AvaTax does not copy the AvaTax data to the cloned transaction without calculating the tax.

- a. **Event:** Created
- b. **Criteria for this Action Group:** No criteria—just execute the actions
- c. **Immediate Actions:** Update AvaTax custom field values.
 - I. Sales Tax Amount = NULL
 - II. Sales Tax Details = NULL

Contract: AvaTax Message Upgrade - Clear AvaTax Custom Field Value

The process builder is used to clear the Contract AvaTax line level custom fields while cloning the transaction. The AvaTax does not copy the AvaTax data to the cloned transaction without calculating the tax.

- a. **Event:** Created
- b. **Criteria for this Action Group:** No criteria—just execute the actions
- c. **Immediate Actions:** Update AvaTax custom field values.
 - I. Sales Tax Amount = NULL
 - II. AvaTax Message = NULL
 - III. Invoice Message = NULL

Contract : Copy IOR/Entity Use Code on Existing Contract

If a user changes the Account on the existing Contract, then the process builder updates the Entity/Use code, IOR field from the Account fields.

- a. **Event:** Created or Edited
- b. **Criteria for this Action Group:** Account ID is not null and changed on the existing Contract
- c. **Immediate Actions:** Update AvaTax custom field values.
 - I. Entity/Use code = [Contract].Account.AVA_MAPPER__Entity_Use_code__c
 - II. Is Seller Importer Of Record
= [Contract].Account.AVA_MAPPER_Is_Seller_Importer_Of_Record__c

Contract: Copy IOR/Entity Use Code on New Contract

If a user creates a new Contract, then the process builder updates the Entity/Use code, IOR field from the Account fields.

- a. **Event:** Created
- b. **Criteria for this Action Group:** Account ID is not null
- c. **Immediate Actions:** Update AvaTax custom field values.
 - I. Entity/Use code = [Contract].Account.AVA_MAPPER__Entity_Use_code__c

- II. Is Seller Importer Of Record = [Contract
].Account.AVA_MAPPER_Is_Seller_Importer_Of_Record__c

Contract: AvaTax Message Upgrade

If a transaction is modified, the user needs to recalculate the tax. The process builder displays the message Tax Amount Is Outdated in the AvaTax message field.

- a. **Event:** Created or Edited
- b. **Criteria for this Action Group:** Any one of the below field value has been changed on the Contract object.
Account ID, Is Seller Importer Of Record, Entity/Use code, ShippingStreet, ShippingCity, ShippingPostalCode, ShippingState, ShippingCountry, BillingStreet, BillingCity, BillingPostalCode, BillingState, BillingCountry
- c. **Immediate Actions:** Update AvaTax custom field value.
AvaTax Message = Tax Amount Is Outdated

Contract Status_Location Code

The process builder is used to clear the upgrade the AvaTax message on contract when the location code is change on subscription.

- a. **Event:** Created or Edited
- b. **Criteria for this Action Group:** Any one of the below field value has been changed on the subscription object.
Location Code, Net Price, Product ID
- c. **Immediate Actions:** Update AvaTax custom field value.
AvaTax Message = Tax Amount Is Outdated

Order

Order: Copy IOR/Entity Use Code on Existing Order

If a user changes the Account on the existing Contract, then the process builder updates the Entity/Use code, IOR field from the Account fields.

- a. **Event:** Created or Edited
- b. **Criteria for this Action Group:** Account ID is not null and changed on the existing Contract
- c. **Immediate Actions:** Update AvaTax custom field values.
 - I. Entity/Use code = [Order].Account.AVA_MAPPER__Entity_Use_code__c
 - II. Is Seller Importer Of Record
= [Order].Account.AVA_MAPPER_Is_Seller_Importer_Of_Record__c

Order: Copy IOR/Entity Use Code on Existing Order

If a user creates a new Order, then the process builder updates the Entity/Use code, IOR field from the Account fields.

- a. **Event:** Created
- b. **Criteria for this Action Group:** Account ID is not null
- c. **Immediate Actions:** Update AvaTax custom field values.

- I. Entity/Use code = [Order].Account.AVA_MAPPER__Entity_Use_code__c
- II. Is Seller Importer Of Record
= [Order].Account.AVA_MAPPER_Is_Seller_Importer_Of_Record__c

Order Status_Location Code

The process builder is used to clear the upgrade the AvaTax message on order when the location code is change on order item.

- a. **Event:** Created or Edited
- b. **Criteria for this Action Group:** Any one of the below field value has been changed on the order item object.
Location Code
- c. **Immediate Actions:** Update AvaTax custom field value.
AvaTax Message = Tax Amount Is Outdated

Quote

Quote: Automatic Tax Calculation

The process builder is used for the automatic tax calculation functionality. The AvaTax Salesforce CPQ+ is setting messages in the AvaTax fields and calls out the AvaTax Apex method.

- a. **Event:** Created or Edited
- b. **Criteria for this Action Group:** When a Calculate Tax (AVA_SFCPQ__Quote_AutomateTaxCalculation__c) checkbox is checked
- c. **Immediate Actions:**
 - I. Update values in the AvaTax Custom fields
AvaTax Message = Auto Sales Tax Calc Triggered - Refresh your browser for result
Calculate Tax = Uncheck the checkbox
 - II. Call the Apex Method -
Class: AVA_SFCPQ__CalculateQuoteTaxController
Apex Variables: docId - Field Reference - [Quote].Id

Quote: Upgrade IOR/Entity Use Code on Existing Quote

If a user changes the Account on the existing Quote, then the process builder updates the Entity/Use code, IOR field from the Account fields.

- a. **Event:** Created or Edited
- b. **Criteria for this Action Group:** Account ID is not null and changed on the existing Quote
- c. **Immediate Actions:** Update AvaTax custom field values.
 - I. Entity/Use code = [Quote].Account.AVA_MAPPER__Entity_Use_code__c
 - II. Is Seller Importer Of Record
= [Quote].Account.AVA_MAPPER_Is_Seller_Importer_Of_Record__c

Quote: Upgrade IOR/Entity Use Code on New Quote

If a user creates a new Quote, then the process builder updates the Entity/Use code, IOR field from the Account fields.

- a. **Event:** Created
- b. **Criteria for this Action Group:** Account ID is not null
- c. **Immediate Actions:** Update AvaTax custom field values.
 - I. Entity/Use code = [Quote].Account.AVA_MAPPER__Entity_Use_code__c
 - II. Is Seller Importer Of Record
= [Quote].Account.AVA_MAPPER_Is_Seller_Importer_Of_Record__c

Update AvaTaxMessage on Quotes

If a transaction is modified, the user needs to recalculate the tax. The process builder displays the message Tax Amount Is Outdated in the AvaTax message field.

- a. **Event:** Created or Edited
- b. **Criteria for this Action Group:** Any one of the below field value has been changed on the Quote object
Account ID, Is Seller Importer Of Record, Entity/Use code, ShippingStreet, ShippingCity, ShippingPostalCode, ShippingState, ShippingCountry, BillingStreet, BillingCity, BillingPostalCode, BillingState, BillingCountry, Net Amount
- c. **Immediate Actions:** Update AvaTax custom field value.
AvaTax Message = Tax Amount Is Outdated

Quote Status_Location Code

The process builder is used to clear the upgrade the AvaTax message on Quote when the location code is change on quote item.

- a. **Event:** Created or Edited
- b. **Criteria for this Action Group:** Any one of the below field value has been changed on the quote item object.
Location Code
- d. **Immediate Actions:** Update AvaTax custom field value.
AvaTax Message = Tax Amount Is Outdated

Workflow

Order

The process builder is used to upgrade the AvaTax message.

- a. Evaluate the rule when a record is created, and every time it's edited.
- b. **Rule Criteria:**
ISCHANGED(TotalAmount) || ISCHANGED(BillingAddress) || ISCHANGED(ShippingAddress)||
ISCHANGED(AccountId)|| ISCHANGED(AVA_SFCPQ__Entity_Use_Code__c)|| ISCHANGED(
AVA_SFCPQ__Is_Seller_Importer_Of_Record__c)
- c. **Immediate Actions:** Update AvaTax custom field value.
AvaTax Message = Tax Amount Is Outdated