



AvaTax Mapper Studio

User Guide for Mapper Studio

Revision date: 03/29/2019

Product Release: CPQ+ v2.0

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Introduction

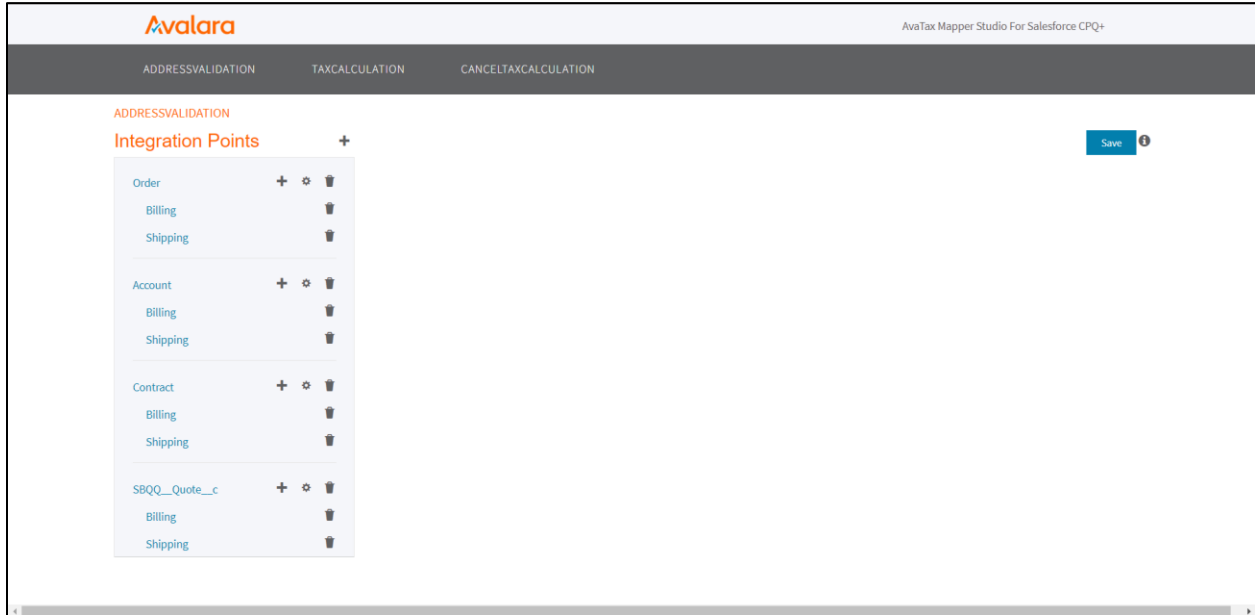
Avalara AvaTax Mapper Studio is a user interface to generate a modified config XML. You can manage or edit your integration points for AvaTax Mapper to work.

The Mapper Studio has the following capabilities:

- User can add new integration points (object) and new fields for address validation, tax calculation, and cancel tax calculation.
- Remove the existing integration point.
- Define hooks for functionality modification.
- Validate query and fetch parameters from a query for defining its source value.
- User interface works on a point and click method.
- User can define the classes for hooks.

Steps to Open AvaTax Mapper Studio

1. Go to **Setup -> Installed Packages -> Configure (AvaTax For Salesforce CPQ+)** -> **Advanced Settings** -> Under **Additional Settings, Click Launch Mapper Studio**.
2. You can view the below screen on a new tab.



Mapper Studio

After you open the Mapper Studio, you can view the AvaTax functionalities on the user interface.

On the Mapper Studio Avalara AvaTax provides integrations on the following functionalities:

- Address Validation
- Tax Calculation
- Cancel Tax Calculation





Note: Address Validation tab is the default tab.

Integration Points

To add the integration points:

1. Avalara has enlisted the supported integration points in the Mapper Studio.

Default integrations are:

- Order
 - Account
 - Contract
 - SBQQ__Quote__c
2. Click the plus icon  to add a new integration point(object).
 3. SELECT NEW OBJECT NAME dialog box opens.
 4. Select the object from the dropdown list, and click **Add** to add the object.
 5. Under object, click the plus icon  to add a new field.
 6. ADD NEW FIELD DETAILS dialog box opens.
 7. Type the address in the test box and click **Add**.
 8. Click the delete icon  , and click **Delete** on the Delete dialog box to delete an object.
 9. Click the delete icon  , and click **Delete** on the Delete dialog box to delete the field.

How to Create Additional Integration Point (objects) and Fields?

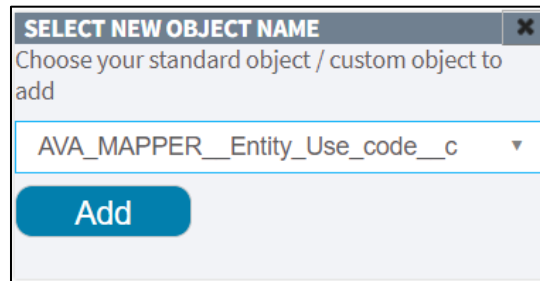
Steps to create additional integration point(objects) and fields:

ADDRESSVALIDATION

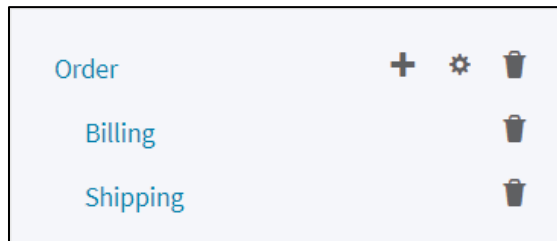
- i. Click the plus icon **+** to add an additional integration point(object).



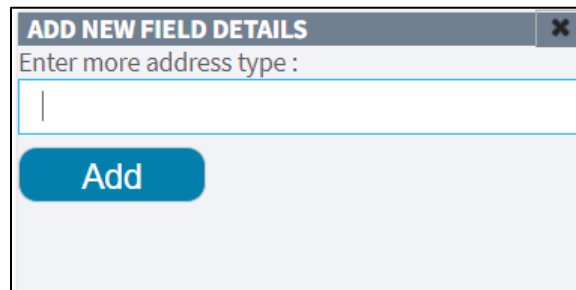
- ii. SELECT NEW OBJECT NAME dialog box opens.
- iii. Select the object from the dropdown list, and click **Add** to add the object.



- iv. Under object, click the plus icon **+** to add a new field.

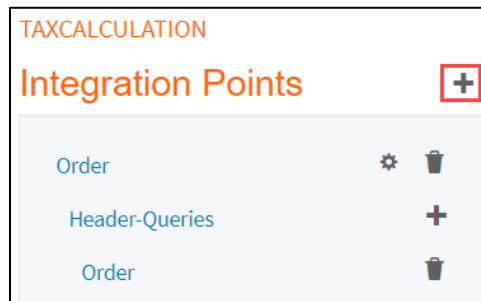


- v. ADD NEW FIELD DETAILS dialog box opens.
- vi. Type the address in the test box and click Add.

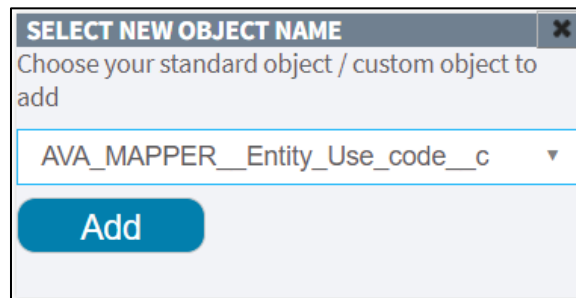


TAXCALCULATION

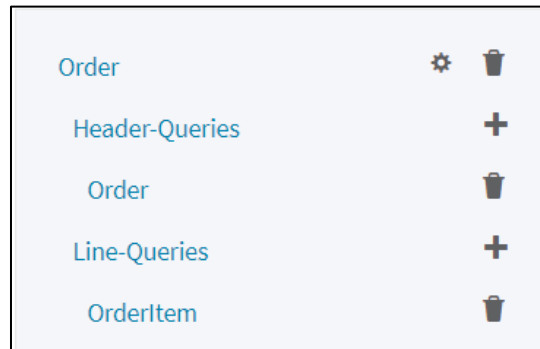
- i. Click the plus icon **+** to add an additional integration point(object).



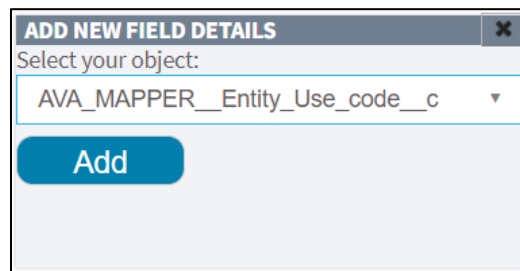
- ii. SELECT NEW OBJECT NAME dialog box opens.
 iii. Select the object from the dropdown list, and click **Add** to add the object.



- iv. Click the plus icon **+** on Header and Line Queries of integration point(object) to add a new object at header and line level.

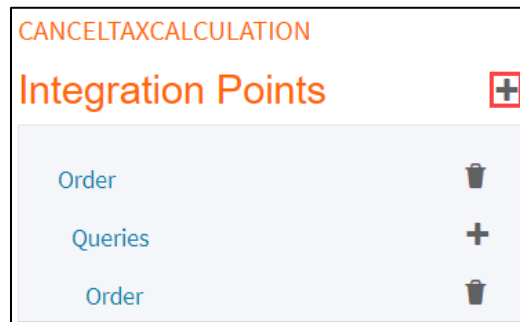


- v. ADD NEW FIELD DETAILS dialog box opens.
 vi. Select the object from the dropdown list, and click Add to add the object.

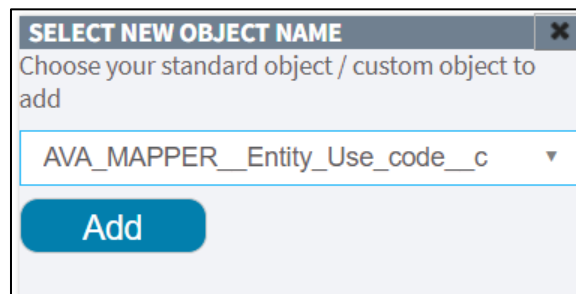


CANCEL TAX CALCULATION

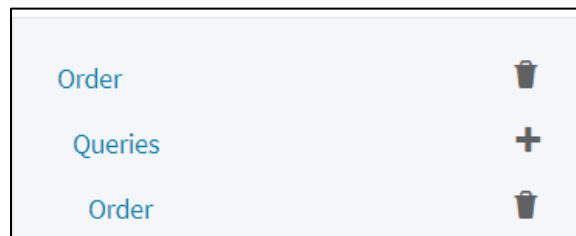
- i. Click the plus icon **+** to add an additional integration point(object).



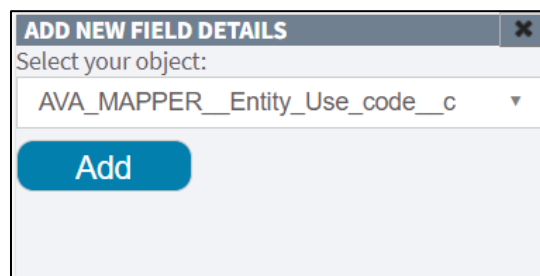
- ii. SELECT NEW OBJECT NAME dialog box opens.
 iii. Select the object from the dropdown list, and click **Add** to add the object.



- iv. Click the plus icon **+** on Queries of integration point(object) to add a new object at query level.



- v. ADD NEW FIELD DETAILS dialog box opens.
 vi. Select the object from the dropdown list, and click **Add** to add the object.



Hooks

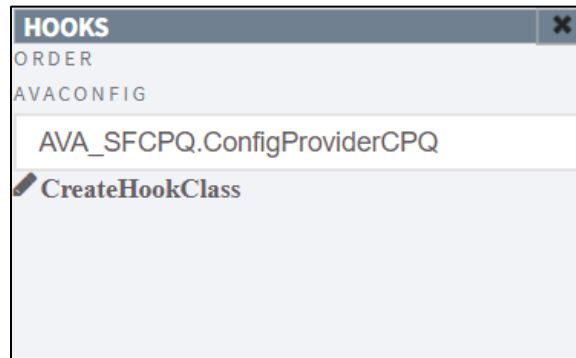
Hooks are the facility to customize the logic before or after tax calculation. Hooks varies from functional tabs.


The following types of hooks for tabs:

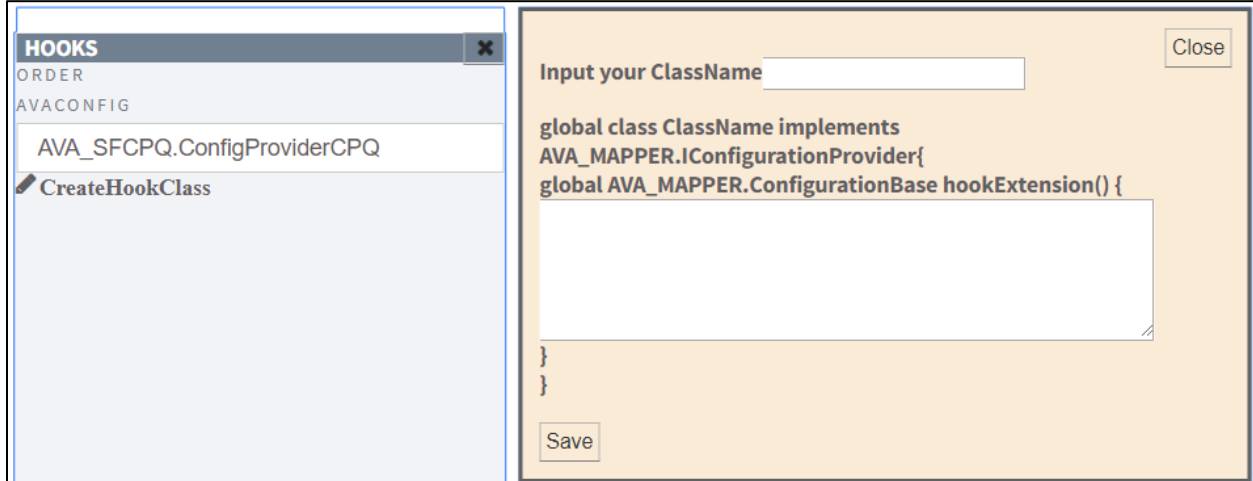
Hooks for Address Validation

- i. Click the setting icon  to add new hook class in the integration point.

Note: Avalara has defined the default sets of hook class.



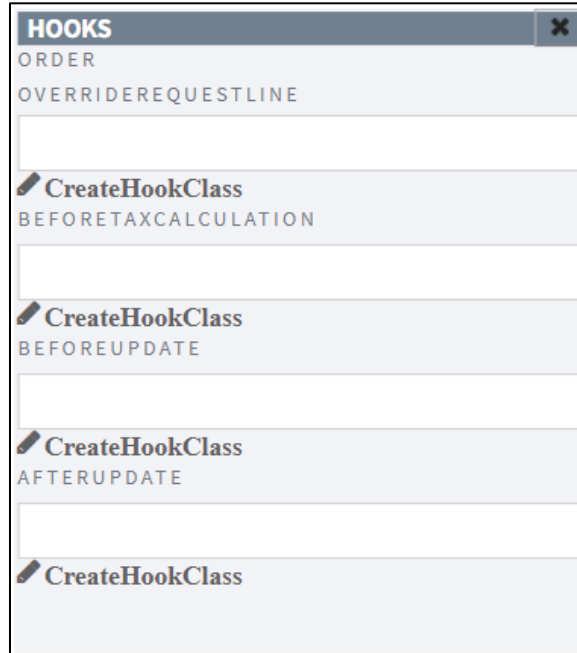
- ii. Click the edit icon  to type the definition of the hook.
- iii. Click **Save**.




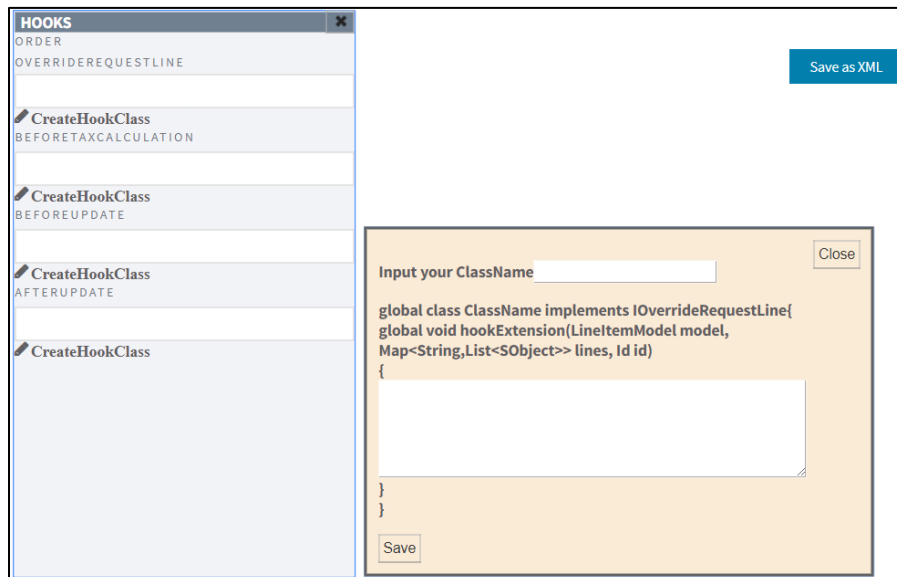
Hooks for Tax Calculation

- i. Click the setting icon  to add new hook class in the integration point.

Note: Avalara has defined the default sets of hook class.



- ii. Click the edit icon  to type the definition of the hook.
- iii. Click **Save**.



Note: After every execution you must click **Save as XML** to save your changes, otherwise, it will temporarily deletes the object/field, but resides in config XML.

How to Map Request and Response Mapping(s)?

Whenever you add a new integration point, or you want to make changes in the request and response mappings, and then click on the object/field under integration point.

- Go to **ADDRESSVALIDATION->Order->Billing**.

Addressvalidation is a functionality, order is integration point on addressvalidation, and billing is the type of address.

Click **Billing**, to view the different sections on the right side which is shown below:

Query for Billing

It is placeholder where a user can enter/modify a Salesforce Object Query Language (SOQL), which gets validated with the help of salesforce. If a query is not valid, then its display an alert, or else, it fetched the parameter's data from the query, and displays the request and response mapping.

```
QUERY FOR BILLING :
select BillingStreet, BillingCity,BillingState,BillingCountry,BillingPostalCode from Order where id = '{OrderId}'
```

Query Parameters

This section gets list of all the parameters which are entered in query '{}'. You can define its data, either it can be an Id, OptParams (optional param), or object.

```
QUERY PARAMETERS
```

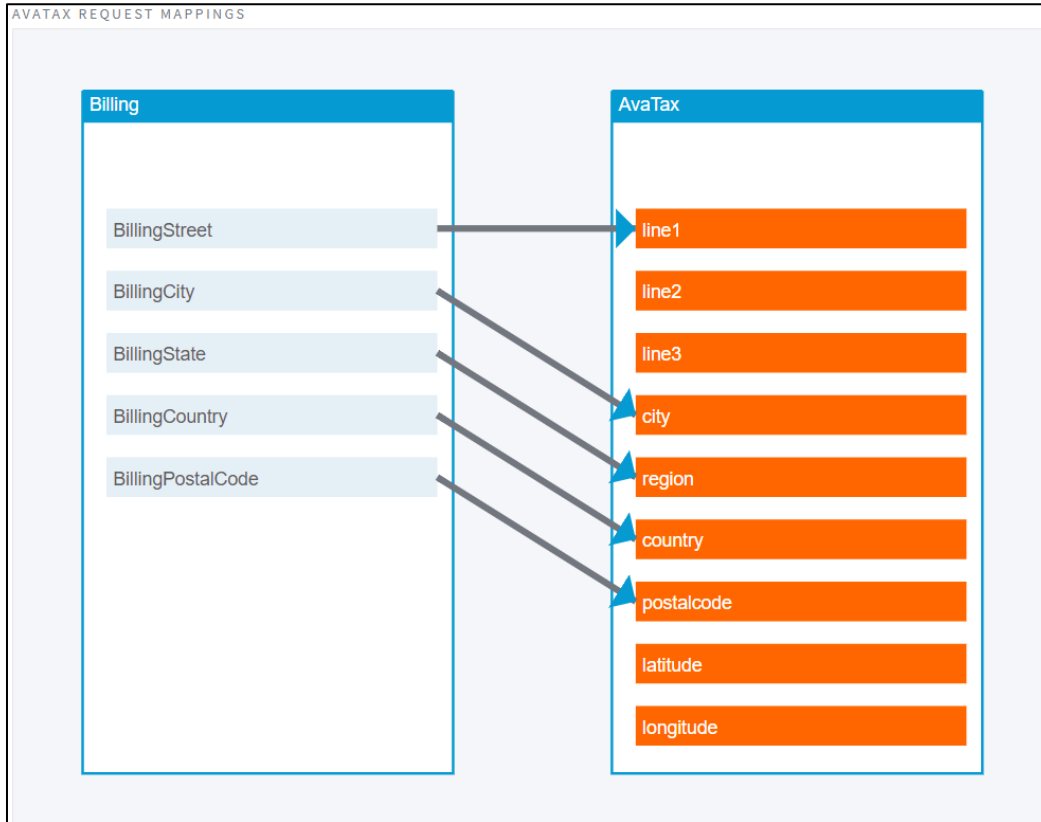
Please select appropriate option for parameters

ORDERID

Id ▼

AvaTax Request Mapping(s)

Below mapping diagram shows request mapping. In the below diagram billing fields are mapped with AvaTax, which means the data entered in the BillingStreet is mapped with line1 of AvaTax, and it is passed to the request. It is the same for the rest of the fields.



AvaTax Response Mapping(s)

Below update mapping diagram shows response mapping. In the below diagram AvaTax fields are mapped with billing fields. It means response received from AvaTax service call in line 1 is shown in BillingStreet. It is same for the remaining fields.

