



# Avalara AvaTax for Salesforce Billing

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## System Integration Guide

Release Date: 03/20/2020  
Product Release: v4.0

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## 1.0. 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.
4. Tax Break-up on Order, Invoice, Credit Note, and Debit Note.

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

## 2.0. Configuration

### 2.1. Integration point for Address Validation

The following table displays the list of integration point for Address Validation:

Sr. No.	Integration Pages/ Files/ Components	Address Validation
1.	Account	Yes
2.	Legal Entity	Yes
3.	Contact	Yes

### 2.2. Integration point for Test Connection

The following table displays the list of integration point for Test Connection:

Sr. No.	Integration Page/ File/ Component	Test Connection	Trigger
1.	Tax Integration	Yes	AvalaraConfigurationUpdateTrigger

### 2.3. List of integrations on transaction pages

The following table displays the list of integrations on transaction pages:

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

### 3.0. Object Mapping

#### 3.1. Order Object

Sr. No.	Salesforce object	Salesforce fields (API Name)	AvaTax Field	Details	Descriptions
<b>Request Fields</b>					
1.	Account	<ul style="list-style-type: none"> <li>Name</li> <li>Id</li> </ul>	CustomerCode	<ul style="list-style-type: none"> <li>Required: Yes</li> <li>Data Type: String</li> </ul> Example: 0011Y00002GPqw1	<ul style="list-style-type: none"> <li>AvaTax CustomerCode passes either Name or Id.</li> </ul>
		AVA_MAPPER__Exemption_Number__c	Exemption No.	<ul style="list-style-type: none"> <li>Required: No</li> <li>Data Type: String</li> </ul> Example: 1234	<ul style="list-style-type: none"> <li>If you specify an exemption number for the document, the document will be considered exempt.</li> </ul>
		AVA_MAPPER__Entity_Use_Code__c	CustomerUsageType	<ul style="list-style-type: none"> <li>Required: No</li> <li>Data Type: String</li> </ul> Example: A	<ul style="list-style-type: none"> <li>Use Entity/Use Codes to apply exemptions in AvaTax.</li> <li>The States and countries are organized by business type and exemption reason.</li> <li>The exemption reasons are based on the country and state.</li> </ul>
		AVA_MAPPER__Business_Identification_Number__c	Businessidentificationnumber	<ul style="list-style-type: none"> <li>Required: No</li> <li>Data Type: String</li> </ul> Example: 123456789	<ul style="list-style-type: none"> <li>VAT business identification number for the customer for this transaction.</li> </ul>
		AVA_MAPPER__Is_Seller_Importer_Of_Record__c	IsSellerImporterOfRecord	<ul style="list-style-type: none"> <li>Required: No</li> <li>Data Type: Boolean</li> </ul> Example: True/False	<ul style="list-style-type: none"> <li>Specifies if the transaction should have value-added and cross-border taxes calculated with the seller as the importer of record.</li> </ul>
2.	System Date	System.Today()	docDate	<ul style="list-style-type: none"> <li>Required: Yes</li> <li>Data Type: DateTime</li> </ul> Example: 02/27/2018	<ul style="list-style-type: none"> <li>The date on the Order, Invoice, Credit Note etc.</li> </ul>

Sr. No.	Salesforce object	Salesforce fields (API Name)	AvaTax Field	Details	Descriptions
3.	Order Product	orderProduct.blng__LegalEntity__c	CompanyCode	<ul style="list-style-type: none"> <li>Required: Yes</li> <li>Data Type: String</li> </ul> Example: default	<ul style="list-style-type: none"> <li>Custom field on Order Product for company code.</li> <li>Company Code and Legal Entity name should match (case sensitive).</li> <li>Legal Entity name represents AvaTax company code in Billing connector.</li> </ul>
4.	Order	<ul style="list-style-type: none"> <li>Order.Name</li> <li>Order.Id</li> </ul>	DocCode	<ul style="list-style-type: none"> <li>Required: Yes</li> <li>Data Type: String</li> </ul> Example: 123	<ul style="list-style-type: none"> <li>It is a dropdown option under the Tax Integration object.</li> <li>It allows to choose whether to pass Order Name or Id as DocCode.</li> </ul>
5.	Legal Entity	<ul style="list-style-type: none"> <li>blng__LegalEntity__c.blng__Street1__c</li> <li>blng__LegalEntity__r.blng__Street2__c</li> </ul>	<ul style="list-style-type: none"> <li>ShipFrom Address</li> <li>Street1</li> <li>Street2</li> </ul>	<ul style="list-style-type: none"> <li>Required: Yes</li> <li>[Street2 is optional]</li> <li>Data Type: String</li> </ul> Example: 900 winslow way e	<ul style="list-style-type: none"> <li>Legal Entity address.</li> <li>Fallback Organization address.</li> </ul>
		blng__LegalEntity__c.blng__City__c	<ul style="list-style-type: none"> <li>ShipFrom Address</li> <li>City</li> </ul>	<ul style="list-style-type: none"> <li>Required: Yes</li> <li>Data Type: String</li> </ul> Example: BI	<ul style="list-style-type: none"> <li>Legal Entity address.</li> <li>Fallback Organization address.</li> </ul>
		blng__LegalEntity__c.blng__State__c	<ul style="list-style-type: none"> <li>ShipFrom Address</li> <li>State</li> </ul>	<ul style="list-style-type: none"> <li>Required: Yes</li> <li>Data Type: String</li> </ul> Example: WA	<ul style="list-style-type: none"> <li>Legal Entity address.</li> <li>Fallback Organization address.</li> </ul>
		blng__LegalEntity__c.blng__Country__c	<ul style="list-style-type: none"> <li>ShipFrom Address</li> <li>Country</li> </ul>	<ul style="list-style-type: none"> <li>Required: Yes</li> <li>Data Type: String</li> </ul> Example: US	<ul style="list-style-type: none"> <li>Legal Entity address.</li> <li>Fallback Organization address.</li> </ul>
		blng__LegalEntity__c.blng__ZipPostalCode__c	<ul style="list-style-type: none"> <li>ShipFrom Address</li> <li>PostalCode</li> </ul>	<ul style="list-style-type: none"> <li>Required: Yes</li> <li>Data Type: String</li> </ul> Example: 98110	<ul style="list-style-type: none"> <li>Legal Entity address.</li> <li>Fallback Organization address.</li> </ul>

Sr. No.	Salesforce object	Salesforce fields (API Name)	AvaTax Field	Details	Descriptions
6.	Account, Order	<ul style="list-style-type: none"> <li>Order: Account Billing Address</li> <li>Order: Account Shipping Address</li> <li>Order: Bill To Contact</li> <li>Order: Ship To Contact</li> <li>Billing Account: Billing Address</li> <li>Billing Account: Shipping Address</li> <li>Billing Account: Bill to Contact</li> </ul>	ShipTo Address	<ul style="list-style-type: none"> <li>Required: Yes</li> <li>Data Type: String</li> </ul> Example: 900 winslow way e	<ul style="list-style-type: none"> <li>Billing package configuration.</li> </ul>
<b>Line Item</b>					
7.	Order Product	Quantity	Qty	<ul style="list-style-type: none"> <li>Required: Yes</li> <li>Data Type: Decimal</li> </ul> Example: 1	<ul style="list-style-type: none"> <li>Order product quantity.</li> </ul>
8.	Product	<ul style="list-style-type: none"> <li>Product.ProductCode</li> <li>Product.Name</li> </ul>	ItemCode	<ul style="list-style-type: none"> <li>Required: No</li> <li>Data Type: String</li> </ul> Example: ABC	<ul style="list-style-type: none"> <li>If product code is missing, then the Product Name is used as ItemCode.</li> </ul>
9.	Order Product	Unit Price and Quantity	Amount	<ul style="list-style-type: none"> <li>Required: Yes</li> <li>Data Type: Decimal</li> </ul> Example: 100.00	<ul style="list-style-type: none"> <li>After multiplying Unit Price and Quantity, the value is passed as amount.</li> </ul>
10.	Product	Product.Description	Description	<ul style="list-style-type: none"> <li>Required: No</li> <li>Data Type: String</li> </ul> Example: Product Description	<ul style="list-style-type: none"> <li>It passes the description of the product.</li> </ul>
11.	Order Product	<ul style="list-style-type: none"> <li>Tax Street [Override]</li> <li>City [Override]</li> <li>State [Override]</li> <li>Zip [Override]</li> <li>Country [Override]</li> </ul>	Origin Address	<ul style="list-style-type: none"> <li>Required: No</li> <li>Data Type: String</li> </ul>	<ul style="list-style-type: none"> <li>Order Line Level Address Fields for ShipFrom Address Override.</li> </ul>

Sr. No.	Salesforce object	Salesforce fields (API Name)	AvaTax Field	Details	Descriptions
<b>Tax Code</b>					
12.	Tax Treatment	blng__Tax_Code__c	TaxCode	<ul style="list-style-type: none"> <li>• Required: No</li> <li>• Data Type: String</li> </ul> Example: FR	<ul style="list-style-type: none"> <li>• Applied to Order Line Level.</li> </ul>
<b>Exemption</b>					
13.	Account	AVA_MAPPER__Exemption_Number__c	exemptionNo	<ul style="list-style-type: none"> <li>• Required: No</li> <li>• Data Type: String</li> </ul> Example: 1234	<ul style="list-style-type: none"> <li>• If you specify an exemption number for the document, the document will be considered exempt.</li> </ul>
<b>Response fields</b>					
14.	Order Product	Order_Item__c	Order Line Tax Breakup of AvaTax Field	<ul style="list-style-type: none"> <li>• Jurisdiction</li> <li>• Jurisdiction Type</li> <li>• Non-Taxable</li> <li>• Rate %</li> <li>• Tax</li> <li>• Taxable</li> <li>• Tax Name</li> <li>• Exempt</li> </ul>	<ul style="list-style-type: none"> <li>• Using custom object to display data. Please refer object definition for <a href="#">Order_Line_Tax_Breakup__c</a> as shown in below table.</li> </ul>

### 3.1.1. Order Line Tax Breakup

Sr. No.	Field API Name	Field Labels	AvaTax Field	Descriptions
1.	Exempt_Amount__c	Exempt	exemptAmount	<ul style="list-style-type: none"> <li>To store exempt amount received from AvaTax service.</li> </ul>
2.	Juris_Name__c	Jurisdiction	jurisName	<ul style="list-style-type: none"> <li>To store jurisdiction name received from AvaTax service.</li> </ul>
3.	Juris_Type__c	Jurisdiction Type	jurisType	<ul style="list-style-type: none"> <li>To store jurisdiction type received from AvaTax service.</li> </ul>
4.	Non_Taxable__c	Non-Taxable	nonTaxableAmount	<ul style="list-style-type: none"> <li>To store nontaxable amount received from AvaTax service.</li> </ul>
5.	Order_Item__c	Order Item	itemCode	<ul style="list-style-type: none"> <li>To store the Item Code value.</li> </ul>
6.	Rate__c	Rate %	rate	<ul style="list-style-type: none"> <li>To store rate received from AvaTax service.</li> </ul>
7.	Tax__c	Tax	tax	<ul style="list-style-type: none"> <li>To store tax received from AvaTax service.</li> </ul>
8.	Taxable_Amount__c	Taxable	taxableAmount	<ul style="list-style-type: none"> <li>To store taxable amount received from AvaTax service.</li> </ul>
9.	Tax_Name__c	Tax Name	taxName	<ul style="list-style-type: none"> <li>To store tax name received from AvaTax service.</li> </ul>



### 3.2. Invoice Object

Sr. No.	Salesforce object	Salesforce field (API Name)	AvaTax Field	Details	Descriptions
<b>Request Fields</b>					
1.	Account	<ul style="list-style-type: none"> <li>Name</li> <li>Id</li> </ul>	CustomerCode	<ul style="list-style-type: none"> <li>Required: Yes</li> <li>Data Type: String</li> </ul> Example: 0011Y00002GPqw1	<ul style="list-style-type: none"> <li>AvaTax CustomerCode passes either Name or Id.</li> </ul>
		AVA_MAPPER__Exemption_Number__c	Exemption No.	<ul style="list-style-type: none"> <li>Required: No</li> <li>Data Type: String</li> </ul> Example: 1234	<ul style="list-style-type: none"> <li>If you specify an exemption number for the document, the document will be considered exempt.</li> </ul>
		AVA_MAPPER__Entity_Use_Code__c	CustomerUsageType	<ul style="list-style-type: none"> <li>Required: No</li> <li>Data Type: String</li> </ul> Example: A	<ul style="list-style-type: none"> <li>Use entity use codes to apply exemptions in AvaTax. States and countries are organized by business type and exemption reason. Exemption reasons differ based on the country and state.</li> </ul>
		AVA_MAPPER__Business_Identifier_Number__c	Businessidentificationnumber	<ul style="list-style-type: none"> <li>Required: No</li> <li>Data Type: String</li> </ul> Example: 123456789	<ul style="list-style-type: none"> <li>VAT business identification number for the customer for this transaction.</li> </ul>
		AVA_MAPPER__Is_Seller_Importer_Of_Record__c	IsSellerImporterOfRecord	<ul style="list-style-type: none"> <li>Required: No</li> <li>Data Type: Boolean</li> </ul> Example: True/False	<ul style="list-style-type: none"> <li>Specifies if the transaction should have value-added and cross-border taxes calculated with the seller as the importer of record.</li> </ul>
2.	System Date	System.Today()	docDate	<ul style="list-style-type: none"> <li>Required: Yes</li> <li>Data Type: DateTime</li> </ul> Example: 02/27/2018	<ul style="list-style-type: none"> <li>The date on the Order, Invoice, Credit Note, and Debit Note etc.</li> </ul>
3.	Invoice Product	invoiceProduct.blng__LegalEntity__c	CompanyCode	<ul style="list-style-type: none"> <li>Required: Yes</li> <li>Data Type: String</li> </ul> Example: default	<ul style="list-style-type: none"> <li>Copied from Order at the time of Invoice Generation.</li> </ul>

Sr. No.	Salesforce object	Salesforce field (API Name)	AvaTax Field	Details	Descriptions
4.	Invoice	<ul style="list-style-type: none"> <li>Invoice.Name</li> <li>Invoice.Id</li> </ul>	DocCode	<ul style="list-style-type: none"> <li>Required: Yes</li> <li>Data Type: String</li> </ul> Example: 123	<ul style="list-style-type: none"> <li>It is a dropdown option under the Tax Integration object.</li> <li>It allows to choose whether to pass Order Name or Id as DocCode.</li> </ul>
5.	Legal Entity	<ul style="list-style-type: none"> <li>blng__LegalEntity__c.blng__Street1__c</li> <li>blng__LegalEntity__r.blng__Street2__c</li> </ul>	<ul style="list-style-type: none"> <li>ShipFrom Address</li> <li>Street1</li> <li>Street2</li> </ul>	<ul style="list-style-type: none"> <li>Required: Yes</li> <li>[Street2 is optional]</li> <li>Data Type: String</li> </ul> Example: 900 winslow way e	<ul style="list-style-type: none"> <li>Legal Entity address.</li> <li>Fallback Organization address.</li> </ul>
		blng__LegalEntity__c.blng__City__c	<ul style="list-style-type: none"> <li>ShipFrom Address</li> <li>City</li> </ul>	<ul style="list-style-type: none"> <li>Required: Yes</li> <li>Data Type: String</li> </ul> Example: BI	<ul style="list-style-type: none"> <li>Legal Entity address.</li> <li>Fallback Organization address.</li> </ul>
		blng__LegalEntity__c.blng__State__c	<ul style="list-style-type: none"> <li>ShipFrom Address</li> <li>State</li> </ul>	<ul style="list-style-type: none"> <li>Required: Yes</li> <li>Data Type: String</li> </ul> Example: WA	<ul style="list-style-type: none"> <li>Legal Entity address.</li> <li>Fallback Organization address.</li> </ul>
		blng__LegalEntity__c.blng__Country__c	<ul style="list-style-type: none"> <li>ShipFrom Address</li> <li>Country</li> </ul>	<ul style="list-style-type: none"> <li>Required: Yes</li> <li>Data Type: String</li> </ul> Example: US	<ul style="list-style-type: none"> <li>Legal Entity address.</li> <li>Fallback Organization address.</li> </ul>
		blng__LegalEntity__c.blng__ZipPostalCode__c	<ul style="list-style-type: none"> <li>ShipFrom Address</li> <li>PostalCode</li> </ul>	<ul style="list-style-type: none"> <li>Required: Yes</li> <li>Data Type: String</li> </ul> Example: 98110	<ul style="list-style-type: none"> <li>Legal Entity address.</li> <li>Fallback Organization address.</li> </ul>
6.	Account, Order	<ul style="list-style-type: none"> <li>Order: Account Billing Address</li> <li>Order: Account Shipping Address</li> <li>Order: Bill To Contact</li> <li>Order: Ship To Contact</li> <li>Billing Account: Billing Address</li> <li>Billing Account: Shipping Address</li> <li>Billing Account: Bill to Contact</li> </ul>	ShipTo Address	<ul style="list-style-type: none"> <li>Required: Yes</li> <li>Data Type: String</li> </ul> Example: 900 winslow way e	<ul style="list-style-type: none"> <li>Billing package configuration.</li> </ul>

Sr. No.	Salesforce object	Salesforce field (API Name)	AvaTax Field	Details	Descriptions
<b>Line Item</b>					
7.	Invoice Product	Quantity	Qty	<ul style="list-style-type: none"> <li>Required: Yes</li> <li>Data Type: Decimal</li> </ul> Example: 1	<ul style="list-style-type: none"> <li>Invoice product quantity.</li> </ul>
8.	Product	<ul style="list-style-type: none"> <li>Product.ProductCode</li> <li>Product.Name</li> </ul>	ItemCode	<ul style="list-style-type: none"> <li>Required: No</li> <li>Data Type: String</li> </ul> Example: ABC	<ul style="list-style-type: none"> <li>Product code missing, Product Name is used as ItemCode.</li> </ul>
9.	Invoice Product	Quantity	Amount	<ul style="list-style-type: none"> <li>Required: Yes</li> <li>Data Type: Decimal</li> </ul> Example: 100.00	<ul style="list-style-type: none"> <li>SubTotal Invoice Product line level.</li> </ul>
10.	Product	Qty	Description	<ul style="list-style-type: none"> <li>Required: No</li> <li>Data Type: String</li> </ul> Example: Product Description	<ul style="list-style-type: none"> <li>Product description Invoice Product line level.</li> </ul>
<b>Tax Code</b>					
11.	Tax Treatment	blng__Tax_Code__c	TaxCode	<ul style="list-style-type: none"> <li>Required: No</li> <li>Data Type: String</li> </ul> Example: FR	<ul style="list-style-type: none"> <li>Applied to Invoice Line Level.</li> </ul>
<b>Exemption</b>					
12.	Account	AVA_MAPPER__Exemption_Number__c	exemptionNo	<ul style="list-style-type: none"> <li>Required: No</li> <li>Data Type: String</li> </ul> Example: 1234	<ul style="list-style-type: none"> <li>If you specify an exemption number for the document, the document will be considered exempt.</li> </ul>
<b>Response fields</b>					
13.	Invoice Line	Invoice_line__c	Invoice Line Tax Breakup of AvaTax Field	<ul style="list-style-type: none"> <li>Jurisdiction</li> <li>Jurisdiction Type</li> <li>Non-Taxable</li> <li>Rate %</li> <li>Tax</li> <li>Taxable</li> <li>Tax Name</li> <li>Exempt</li> </ul>	<ul style="list-style-type: none"> <li>Using custom object to display data. Please refer object definition for <a href="#">Invoice Line Tax Breakup__c</a> as shown below.</li> </ul>

### 3.2.1. Invoice Line Tax Breakup

Sr. No.	Field API Name	Field Labels	AvaTax Field	Descriptions
1.	Exempt_Amount__c	Exempt	exemptAmount	<ul style="list-style-type: none"> <li>To store exempt amount received from AvaTax service.</li> </ul>
2.	Juris_Name__c	Jurisdiction	jurisName	<ul style="list-style-type: none"> <li>To store jurisdiction name received from AvaTax service.</li> </ul>
3.	Juris_Type__c	Jurisdiction Type	jurisType	<ul style="list-style-type: none"> <li>To store jurisdiction type received from AvaTax service.</li> </ul>
4.	Non_Taxable__c	Non-Taxable	nonTaxableAmount	<ul style="list-style-type: none"> <li>To store nontaxable amount received from AvaTax service.</li> </ul>
5.	Invoice_line__c	Invoice Line	itemCode	<ul style="list-style-type: none"> <li>To store the Item Code value.</li> </ul>
6.	Rate__c	Rate %	rate	<ul style="list-style-type: none"> <li>To store rate received from AvaTax service.</li> </ul>
7.	Tax__c	Tax	tax	<ul style="list-style-type: none"> <li>To store tax received from AvaTax service.</li> </ul>
8.	Taxable_Amount__c	Taxable	taxableAmount	<ul style="list-style-type: none"> <li>To store taxable amount received from AvaTax service.</li> </ul>
9.	Tax_Name__c	Tax Name	taxName	<ul style="list-style-type: none"> <li>To store tax name received from AvaTax service.</li> </ul>

### 3.3. Credit Note Object

Sr. No.	Salesforce object	Salesforce field (API Name)	AvaTax Field	Details	Descriptions
<b>Request Fields</b>					
1.	• Account	<ul style="list-style-type: none"> <li>Name</li> <li>Id</li> </ul>	CustomerCode	<ul style="list-style-type: none"> <li>Required: Yes</li> <li>Data Type: String</li> </ul> Example: 0011Y00002GPqw1	<ul style="list-style-type: none"> <li>AvaTax CustomerCode passes either Name or Id.</li> </ul>
		AVA_MAPPER_Exemption_Number__c	Exemption No.	<ul style="list-style-type: none"> <li>Required: No</li> <li>Data Type: String</li> </ul> Example: 1234	<ul style="list-style-type: none"> <li>If you specify an exemption number for the document, the document will be considered exempt.</li> </ul>
		AVA_MAPPER_Entity_Use_Code__c	CustomerUsageType	<ul style="list-style-type: none"> <li>Required: No</li> <li>Data Type: String</li> </ul> Example: A	<ul style="list-style-type: none"> <li>Use entity use codes to apply exemptions in AvaTax. States and countries are organized by business type and exemption reason. Exemption reasons differ based on the country and state.</li> </ul>
		AVA_MAPPER_Business_Identifier_Number__c	Businessidentificationnumber	<ul style="list-style-type: none"> <li>Required: No</li> <li>Data Type: String</li> </ul> Example: 123456789	<ul style="list-style-type: none"> <li>VAT business identification number for the customer for this transaction.</li> </ul>
		AVA_MAPPER_Is_Seller_Importer_Of_Record__c	IsSellerImporterOfRecord	<ul style="list-style-type: none"> <li>Required: No</li> <li>Data Type: Boolean</li> </ul> Example: True/False	<ul style="list-style-type: none"> <li>Specifies if the transaction should have value-added and cross-border taxes calculated with the seller as the importer of record.</li> </ul>
2.	System Date	System.Today()	docDate	<ul style="list-style-type: none"> <li>Required: Yes</li> <li>Data Type: DateTime</li> </ul> Example: 02/27/2018	<ul style="list-style-type: none"> <li>The date on the Order, Invoice, Credit Note etc.</li> </ul>

Sr. No.	Salesforce object	Salesforce field (API Name)	AvaTax Field	Details	Descriptions
3.	<ul style="list-style-type: none"> <li>Credit Note Line</li> </ul>	CreditNote.blng__LegalEntity__c	CompanyCode	<ul style="list-style-type: none"> <li>Required: Yes</li> <li>Data Type: String</li> <li>Example: default</li> </ul>	<ul style="list-style-type: none"> <li>It passes company code from Credit Note Product legal entity field.</li> <li>Company Code and Legal Entity name should match (case sensitive).</li> <li>Legal Entity name represents AvaTax company code in Billing connector.</li> </ul>
4.	Credit Note	<ul style="list-style-type: none"> <li>CreditNote.Name</li> <li>CreditNote.Id</li> </ul>	DocCode	<ul style="list-style-type: none"> <li>Required: Yes</li> <li>Data Type: String</li> <li>Example: 123</li> </ul>	<ul style="list-style-type: none"> <li>It is a dropdown option under the Tax Integration object.</li> <li>It allows to choose whether to pass Order Name or Id as DocCode.</li> </ul>
5.	Legal Entity	<ul style="list-style-type: none"> <li>blng__LegalEntity__c.blng__Street1__c</li> <li>blng__LegalEntity__c.blng__Street2__c</li> </ul>	<ul style="list-style-type: none"> <li>ShipFrom Address</li> <li>Street1</li> <li>Street2</li> </ul>	<ul style="list-style-type: none"> <li>Required: Yes</li> <li>[Street2 is optional]</li> <li>Data Type: String</li> <li>Example: 900 winslow way e</li> </ul>	<ul style="list-style-type: none"> <li>Legal Entity address.</li> <li>Fallback Organization address.</li> </ul>
		blng__LegalEntity__c.blng__City__c	<ul style="list-style-type: none"> <li>ShipFrom Address</li> <li>City</li> </ul>	<ul style="list-style-type: none"> <li>Required: Yes</li> <li>Data Type: String</li> <li>Example: BI</li> </ul>	<ul style="list-style-type: none"> <li>Legal Entity address.</li> <li>Fallback Organization address.</li> </ul>
		blng__LegalEntity__c.blng__State__c	<ul style="list-style-type: none"> <li>ShipFrom Address</li> <li>State</li> </ul>	<ul style="list-style-type: none"> <li>Required: Yes</li> <li>Data Type: String</li> <li>Example: WA</li> </ul>	<ul style="list-style-type: none"> <li>Legal Entity address.</li> <li>Fallback Organization address.</li> </ul>
		blng__LegalEntity__c.blng__Country__c	<ul style="list-style-type: none"> <li>ShipFrom Address</li> <li>Country</li> </ul>	<ul style="list-style-type: none"> <li>Required: Yes</li> <li>Data Type: String</li> <li>Example: US</li> </ul>	<ul style="list-style-type: none"> <li>Legal Entity address.</li> <li>Fallback Organization address.</li> </ul>
		blng__LegalEntity__c.blng__ZipPostalCode__c	<ul style="list-style-type: none"> <li>ShipFrom Address</li> <li>PostalCode</li> </ul>	<ul style="list-style-type: none"> <li>Required: Yes</li> <li>Data Type: String</li> <li>Example: 98110</li> </ul>	<ul style="list-style-type: none"> <li>Legal Entity address.</li> <li>Fallback Organization address.</li> </ul>

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

Sr. No.	Salesforce object	Salesforce field (API Name)	AvaTax Field	Details	Descriptions
<b>Exemption</b>					
12.	Account	AVA_MAPPER_Exemption_Number__c	exemptionNo	<ul style="list-style-type: none"> <li>Required: No</li> <li>Data Type: String</li> <li>Example: 1234</li> </ul>	<ul style="list-style-type: none"> <li>If you specify an exemption number for the document, the document will be considered exempt.</li> </ul>
<b>Response fields</b>					
13.	Credit Note Line	Credit_Note_line__c	Credit Note line Tax Breakup of AvaTax Field	<ul style="list-style-type: none"> <li>Jurisdiction</li> <li>Jurisdiction Type</li> <li>Non-Taxable</li> <li>Rate %</li> <li>Tax</li> <li>Taxable</li> <li>Tax Name</li> <li>Exempt</li> </ul>	<ul style="list-style-type: none"> <li>Using custom object to display data. Please refer object definition for <a href="#">Credit Note Line Tax Breakup__c</a> as shown below.</li> </ul>

### 3.3.1. Credit Note Line Tax Breakup

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



### 3.4. Debit Note Object

Sr. No.	Salesforce object	Salesforce field (API Name)	AvaTax Field	Details	Descriptions
<b>Request Fields</b>					
1.	Account	<ul style="list-style-type: none"> <li>Name</li> <li>Id</li> </ul>	CustomerCode	<ul style="list-style-type: none"> <li>Required: Yes</li> <li>Data Type: String</li> </ul> Example: 0011Y00002GPqw1	<ul style="list-style-type: none"> <li>AvaTax CustomerCode passes either Name or Id.</li> </ul>
		AVA_MAPPER__Exemption_Number__c	Exemption No.	<ul style="list-style-type: none"> <li>Required: No</li> <li>Data Type: String</li> </ul> Example: 1234	<ul style="list-style-type: none"> <li>If you specify an exemption number for the document, the document will be considered exempt.</li> </ul>
		AVA_MAPPER__Entity_Use_Code__c	CustomerUsageType	<ul style="list-style-type: none"> <li>Required: No</li> <li>Data Type: String</li> </ul> Example: A	<ul style="list-style-type: none"> <li>Use entity use codes to apply exemptions in AvaTax. States and countries are organized by business type and exemption reason. Exemption reasons differ based on the country and state.</li> </ul>
		AVA_MAPPER__Business_Identification_Number__c	Businessidentification number	<ul style="list-style-type: none"> <li>Required: No</li> <li>Data Type: String</li> </ul> Example: 123456789	<ul style="list-style-type: none"> <li>VAT business identification number for the customer for this transaction.</li> </ul>
		AVA_MAPPER__Is_Seller_Importer_Of_Record__c	IsSellerImporterOfRecord	<ul style="list-style-type: none"> <li>Required: No</li> <li>Data Type: Boolean</li> </ul> Example: True/False	<ul style="list-style-type: none"> <li>Specifies if the transaction should have value-added and cross-border taxes calculated with the seller as the importer of record.</li> </ul>
2.	System Date	System.Today()	docDate	<ul style="list-style-type: none"> <li>Required: Yes</li> <li>Data Type: DateTime</li> </ul> Example: 02/27/2018	<ul style="list-style-type: none"> <li>The date on the Order, Invoice, Credit Note etc.</li> </ul>

Sr. No.	Salesforce object	Salesforce field (API Name)	AvaTax Field	Details	Descriptions
3.	Debit Note Line	DebitNote.blng__LegalEntity__c	CompanyCode	<ul style="list-style-type: none"> <li>Required: Yes</li> <li>Data Type: String</li> </ul> Example: default	<ul style="list-style-type: none"> <li>Custom field on Debit Note Product for company code.</li> <li>Company Code and Legal Entity name should match (case sensitive).</li> <li>Legal Entity name represents AvaTax company code in Billing connector.</li> </ul>
4.	Debit Note	<ul style="list-style-type: none"> <li>DebitNote.Name</li> <li>DebitNote.Id</li> </ul>	DocCode	<ul style="list-style-type: none"> <li>Required: Yes</li> <li>Data Type: String</li> </ul> Example: 123	<ul style="list-style-type: none"> <li>It is a dropdown option under the Tax Integration object.</li> <li>It allows to choose whether to pass Order Name or Id as DocCode.</li> </ul>
5.	Legal Entity	<ul style="list-style-type: none"> <li>blng__LegalEntity__c.blng__Street1__c</li> <li>blng__LegalEntity__c.blng__Street2__c</li> </ul>	<ul style="list-style-type: none"> <li>ShipFrom Address</li> <li>Street1</li> <li>Street2</li> </ul>	<ul style="list-style-type: none"> <li>Required: Yes</li> <li>[Street2 is optional]</li> <li>Data Type: String</li> </ul> Example: 900 winslow way e	<ul style="list-style-type: none"> <li>Legal Entity address</li> <li>Fallback Organization address.</li> </ul>
		blng__LegalEntity__c.blng__City__c	<ul style="list-style-type: none"> <li>ShipFrom Address</li> <li>City</li> </ul>	<ul style="list-style-type: none"> <li>Required: Yes</li> <li>Data Type: String</li> </ul> Example: BI	<ul style="list-style-type: none"> <li>Legal Entity address</li> <li>Fallback Organization address.</li> </ul>
		blng__LegalEntity__c.blng__State__c	<ul style="list-style-type: none"> <li>ShipFrom Address</li> <li>State</li> </ul>	<ul style="list-style-type: none"> <li>Required: Yes</li> <li>Data Type: String</li> </ul> Example: WA	<ul style="list-style-type: none"> <li>Legal Entity address</li> <li>Fallback Organization address.</li> </ul>
		blng__LegalEntity__c.blng__Country__c	<ul style="list-style-type: none"> <li>ShipFrom Address</li> <li>Country</li> </ul>	<ul style="list-style-type: none"> <li>Required: Yes</li> <li>Data Type: String</li> </ul> Example: US	<ul style="list-style-type: none"> <li>Legal Entity address</li> <li>Fallback Organization address.</li> </ul>
		blng__LegalEntity__c.blng__ZipPostalCode__c	<ul style="list-style-type: none"> <li>ShipFrom Address</li> <li>PostalCode</li> </ul>	<ul style="list-style-type: none"> <li>Required: Yes</li> <li>Data Type: String</li> </ul> Example: 98110	<ul style="list-style-type: none"> <li>Legal Entity address</li> <li>Fallback Organization address.</li> </ul>

Sr. No.	Salesforce object	Salesforce field (API Name)	AvaTax Field	Details	Descriptions
6.	Debit Note Line	<b>Debit Note Line :</b> <ul style="list-style-type: none"> <li>• Tax Address</li> <li>• Tax Street</li> <li>• Tax City</li> <li>• Tax State</li> <li>• Tax Country</li> </ul> <b>Debit Note :</b> <ul style="list-style-type: none"> <li>• Tax Address</li> <li>• Tax Street</li> <li>• Tax City</li> <li>• Tax State</li> <li>• Tax Country</li> </ul> <b>Account :</b> <ul style="list-style-type: none"> <li>• Shipping Address</li> </ul>	ShipTo Address	<ul style="list-style-type: none"> <li>• Required: Yes</li> <li>• Data Type: String</li> </ul> Example: 900 winsow way e	<ul style="list-style-type: none"> <li>• If address is unavailable in the Debit Note Line, then it considers the Debit Note address or else Account Shipping Address is considered.</li> </ul>
<b>Line Item</b>					
7.	Debit Note Product	DebitNoteLine.quantity__c	Qty	<ul style="list-style-type: none"> <li>• Required: Yes</li> <li>• Data Type: Decimal</li> </ul> Example: 1	<ul style="list-style-type: none"> <li>• Debit Note Product quantity.</li> </ul>
8.	Product	<ul style="list-style-type: none"> <li>• Product.ProductCode</li> <li>• Product.Name</li> </ul>	ItemCode	<ul style="list-style-type: none"> <li>• Required: No</li> <li>• Data Type: String</li> </ul> Example: ABC	<ul style="list-style-type: none"> <li>• Product code missing ,Product Name is use as ItemCode.</li> </ul>
9.	Debit Note Product	DebitNoteLine.blng__Subtotal__c	Amount	<ul style="list-style-type: none"> <li>• Required: Yes</li> <li>• Data Type: Decimal</li> </ul> Example: 100.00	<ul style="list-style-type: none"> <li>• SubTotal Debit Note Product line level.</li> </ul>
10.	Product	Product.Description	Description	<ul style="list-style-type: none"> <li>• Required: No</li> <li>• Data Type: String</li> </ul> Example: Product Description	<ul style="list-style-type: none"> <li>• Product description Debit Note Product line level.</li> </ul>

Sr. No.	Salesforce object	Salesforce field (API Name)	AvaTax Field	Details	Descriptions
<b>Tax Code</b>					
11.	Tax Treatment	blng__Tax_Code__c	TaxCode	<ul style="list-style-type: none"> <li>• Required: No</li> <li>• Data Type: String</li> <li>Example: FR</li> </ul>	<ul style="list-style-type: none"> <li>• Applied to Debit Note line level.</li> </ul>
<b>Exemption</b>					
12.	Account	AVA_MAPPER__Exemption_Number__c	exemptionNo	<ul style="list-style-type: none"> <li>• Required: No</li> <li>• Data Type: String</li> <li>Example: 1234</li> </ul>	<ul style="list-style-type: none"> <li>• If you specify an exemption number for the document, the document will be considered exempt.</li> </ul>
<b>Response fields</b>					
13.	Debit Note Line	Debit_Note_line__c	Debit Note Line Tax Breakup of AvaTax Field	<ul style="list-style-type: none"> <li>• Jurisdiction</li> <li>• Jurisdiction Type</li> <li>• Non-Taxable</li> <li>• Rate %</li> <li>• Tax</li> <li>• Taxable</li> <li>• Tax Name</li> <li>• Exempt</li> </ul>	<ul style="list-style-type: none"> <li>• Using custom object to display data. Please refer object definition for <a href="#">Debit Note Line Tax Breakup__c</a> as shown below.</li> </ul>

### 3.4.1. Debit Note Line Tax Breakup

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

### 3.5. AvaTax Logs Object

This object stores transaction errors occurred while calculating tax breakup for Order, Invoice, Credit Note and Debit Note objects.

Sr. No.	Label	API Name	Data Type	Descriptions
1.	Object Id	Object_Id__c	Text(255)	<ul style="list-style-type: none"> <li>To store related salesforce Id or any identifier</li> </ul>
2.	Transaction Error	Transaction_Error__c	Long Text Area(32768)	<ul style="list-style-type: none"> <li>To store any kind of error message occurred while performing tax breakup</li> </ul>

## 4.0. AvaTax Custom Fields

The following table displays the list of AvaTax custom fields:

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

## 5.0. 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 the BillingConfig.xml file.
3. Open the BillingConfig.xml file and modify the file as per the below example.
4. Look for the following node and provide the name for an extender class:

```
<taxcalculation>
  <Order>
    .
    .
    .
    .
  <hooks>
    <overriderequestline>OverrideLineRequestExtender</overriderequestline>
  </hooks>
```

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

```
global class OverrideLineRequestExtender implements IOverrideRequestLine {
  global void hookExtension(LinItemModel 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;
  }
}
```

6. Navigate to Notes and Attachment (related list) and delete the existing BillingConfig.xml file and upload the modified BillingConfig.xml file.
7. Navigate to the Order and create a transaction to see the result.

**Note:** If the customer can able to calculate the tax, then it is considered that the AvaTax request is successfully modified.

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

The following steps allows the customer to pass the customerCode other than Id and Name:

1. Go to Tax Integration and select active Tax Integration.
2. Navigate to Notes and Attachment (related list) and download the BillingConfig.xml file.
3. Open the BillingConfig.xml file and modify the file as per the below example.
4. Look for the following node and provide the name for an extender class:

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

5. 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;
  }
}
```

6. Navigate to Notes and Attachment (related list) and delete the existing BillingConfig.xml file and upload the modified BillingConfig.xml file.
7. Navigate to the Order and create a transaction to see the result.

**Note:** If the customer can able to calculate the tax, then it is considered that the AvaTax request is successfully modified.



## 6.0. How to setup batch for Tax Breakup

The Tax breakup batch is used for scheduling the tax breakups for Order, Invoice, Credit Note and Debit Note.

The following apex classes needs to be used to setup batch for tax breakup:

1. User needs to schedule batch Apex class via Schedule Apex from Apex classes.
2. For Scheduling batches please find below list of respective apex classes
  - a. Order Line TaxBreakUps : 'OrderItemTaxBreakupSchedulable'
  - b. Invoice Line TaxBreakUps : 'InvoiceItemTaxBreakupSchedulable'
  - c. Credit Note TaxBreakUps : 'CreditNoteTaxBreakupSchedulable'
  - d. Debit Note TaxBreakUps : 'DebitNoteTaxBreakupSchedulable'

**Note:** User needs to provide an appropriate time span for execution of other jobs while scheduling taxbreakups on different objects.