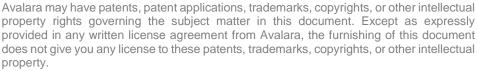# Avalara AvaTax for Salesforce Sales Cloud

System Integration Document for Avalara AvaTax

Revision Date: 06/07/2019
Product Release: v2.0

Tax compliance done right

Table of Contents

1.0. Acronyms and Abbreviations

VAT   Value Added Tax

UPC   Universal Product Code

IOR   Importer Of Record

2.0. Connector Overview

The following functionalities are covered in the AvaTax for Salesforce Sales Cloud:

1. Address Validation on Accounts, Quotes, and Order.
2. Tax Calculation on Opportunity, Quote, and Order.
3. Exemption functionality by using Exemption Number and Entity/Use code.
4. MultiCompany Settings to map multiple AvaTax companies.

The AvaTax Mapper package must be installed first, as the AvaTax for Salesforce Sales Cloud package is dependent on the AvaTax Mapper package.

3.0. Configuration

3.1. List of Integration Points on Master Pages

Sr. No.	Integration Page/File/Component	Address Validation	Test Connection
1.	Account	Yes	No
2.	AvaTax Object	Yes	Yes

3.2. List of Integrations Points on Transaction Pages

Sr. No	Page	Address Validation	Entity/Use code	Date Override	Tax Amount Override	Manual Tax Calculation	Automatic Tax Calculation	Commit Tax	Cancel Tax	Trigger	Process Builder
1.	Opportunity	No	Yes	Yes	Yes (at Opportunity line level)	Yes	Yes	No	No	No	Yes
2.	Quote	Yes	Yes	Yes	Yes (at Quote line level)	Yes	Yes	No	No	No	Yes
3.	Order	Yes	Yes	Yes	Yes (at Order line level)	Yes	Yes	Yes	Yes	Yes	Yes

4.0. Object Mapping

4.1. Opportunity

Sr. No.	Salesforce Object	Salesforce Field (API Name)	AvaTax Object	Details	Descriptions
1.	Account	• Account.AccountNumber • Account.Name	CustomerCode	• Required: Yes • Data Type: String Example: 0011Y00002GPqw	• If the Account Number is available, then it passes the Account Number value as CustomerCode or else account name is passes as a CustomerCode. • AvaTax GetTax service does not accept more than 50 characters.
2.	Opportunity	CreatedDate	DocDate	• Required: Yes • Data Type: DateTime Example: 02/27/2018	• AvaTax for Salesforce Sales Cloud passes Opportunity CreatedDate as DocDate.
3.	AvaTax	AVA_SFCLOUD__Company_Code__c	CompanyCode	• Required: No • Data Type: String Example: default	• AvaTax for Salesforce Sales Cloud has provided an AvaTax Configuration page where a user can select the Company Code from the drop-down option. • Custom Settings stores the Company Code value. • MultiCompany Settings tab has provided in the AvaTax Configuration page to map the multiple AvaTax companies.
4.	Opportunity	Id	DocCode	• Required: No • Data Type: String Example: AbC123	• AvaTax for Salesforce Sales Cloud passes maximum 18 characters of Opportunity ID as a DocCode.
5.	N/A	N/A	debugLevel	• Required: No • Data Type: String Example: Normal	• AvaTax for Salesforce Sales Cloud does not pass any value to the AvaTax Service. • It is considered as a default value and passes "Normal" to the AvaTax Service.
6.	AvaTax	AVA_SFCLOUD__Street__c	ShipFrom Line1	• Required: No • Data Type: String Example: 900 Winslow way e	• If the MultiCompany Settings is configured and the address of the mapped company is available, then the Line1 address of the mapped company will be passed as a ShipFrom Line1 address or else the ShipFrom Line1 of the Corporate Address from the AvaTax Configuration page is considered. • AvaTax for Salesforce Sales Cloud has provided an AvaTax Configuration page where a user can enter the Origin Street address. • The Street address is stored in the AvaTax Custom Settings of the Salesforce. • The maximum field length is of 50 characters.

Sr. No.	Salesforce Object	Salesforce Field (API Name)	AvaTax Object	Details	Descriptions
7.	AvaTax	AVA_SFCLOUD__City__c	ShipFrom City	• Required: No • Data Type: String Example: Bainbridge	• If the MultiCompany Settings is configured and the address of the mapped company is available, then the City address of the mapped company will be passed as a ShipFrom City address or else the ShipFrom City of the Corporate Address from the AvaTax Configuration page is considered. • AvaTax for Salesforce Sales Cloud has provided an AvaTax Configuration page where a user can enter the Origin City address. • The City address is stored in the Salesforce Custom Setting. • The maximum field length is of 50 characters.
8.	AvaTax	AVA_SFCLOUD__State__c	ShipFrom State	• Required: No • Data Type: String Example: WA	• If the MultiCompany Settings is configured and the address of the mapped company is available, then the State address of the mapped company will be passed as a ShipFrom State address or else the ShipFrom State of the Corporate Address from the AvaTax Configuration page is considered. • AvaTax for Salesforce Sales Cloud has provided an AvaTax Configuration page where a user can enter the Origin State address. • The State address is stored in the Salesforce Custom Settings. • The maximum field length is of 50 characters.
9.	AvaTax	AVA_SFCLOUD__Country__c	ShipFrom Country	• Required: No • Data Type: String Example: US	• If the MultiCompany Settings is configured and the address of the mapped company is available, then the Country address of the mapped company will be passed as a ShipFrom Country address or else the ShipFrom Country of the Corporate Address from the AvaTax Configuration page is considered. • AvaTax for Salesforce Sales Cloud has provided an AvaTax Configuration page where a user can enter the Origin Country address. • The Country address is stored in the Salesforce Custom Settings. • The maximum field length is of 50 characters.

Sr. No.	Salesforce Object	Salesforce Field (API Name)	AvaTax Object	Details	Descriptions
10.	AvaTax	AVA_SFCLOUD__Postal_Code__c	ShipFrom PostalCode	• Required: No • Data Type: String Example: 98110	• If the MultiCompany Settings is configured and the address of the mapped company is available, then the PostalCode of the mapped company will be passed as a ShipFrom PostalCode or else the ShipFrom PostalCode of the Corporate Address PostalCode from the AvaTax Configuration page is considered. • AvaTax for Salesforce Sales Cloud has provided an AvaTax Configuration page where a user can enter the Origin Postal Code address. • The Postal Code address is stored in the Salesforce Custom Settings. • The maximum field length is of 11 characters.
11.	Account	• Account.ShippingStreet • Account.BillingStreet	ShipTo Line1	• Required: No • Data Type: String Example: 900 Winslow way e	• If the Shipping Street information is available, then it passes as a ShipTo address Line1, or else Billing Street information is considered. • The maximum field length is of 50 characters.
12.	Account	• Account.ShippingCity • Account.BillingCity	ShipTo City	• Required: No • Data Type: String Example: BI	• If the Shipping City information is available, then it passes as a ShipTo City or else Billing City information is considered. • The maximum field length is of 50 characters.
13.	Account	• Account.ShippingState • Account.BillingState	ShipTo State	• Required: No • Data Type: String Example: WA	• If the Shipping State information is available, then it passes as a ShipTo State or else Billing State information is considered. • The maximum field length 50 is of characters.
14.	Account	• Account.ShippingCountry • Account.BillingCountry	ShipTo Country	Required: No Data Type: String Example: US	• If the Shipping Country information is available, then it passes as a ShipTo Country or else Billing Country information is considered. • The maximum field length is of 50 characters.
15.	Account	• Account.ShippingPostalCode • Account.BillingPostalCode	ShipTo PostalCode	Required: No Data Type: String Example: 98110	• If the Shipping PostalCode information is available, then it passes as a ShipTo PostalCode or else Billing PostalCode information is considered. The maximum field length is of 11 characters.

Sr. No.	Salesforce Object	Salesforce Field (API Name)	AvaTax Object	Details	Descriptions
16.	Opportunity	AVA_SFCLOUD__Tax_Date__c	TaxOverride.TaxDate	• Required: No • Data Type: Date Example: 02/27/2018	• It is used for Tax Date Override functionality. • Provided with a custom field for the Tax Date. • If a new Opportunity record is created, then the AvaTax for Salesforce Sales Cloud copies the Opportunity CreatedDate in the Tax Date field. • If the user modifies the tax date, then the AvaTax for Salesforce Sales Cloud passes the revised date, as a Tax Date Override. • Tax Override Reason - Tax Date Override. • Tax Override Type – TaxDate.
17.	Account	AVA_MAPPER__Business_Identification_Number__c	businessIdentificationNo	• Required: No • Data Type: String Example: ABC123	• This field is the AvaTax Mapper custom field. • If AVA_MAPPER__Business_Identification_Number__c is not blank, then the AvaTax for Salesforce Sales Cloud passes the value to the businessIdentificationNo field. • The maximum field length is of 25 characters.
18.	Account	AVA_MAPPER__Exemption_Number__c	exemptionNo	• Required: No • Data Type: String Example: ABC123	• This field is the AvaTax Mapper custom field. • If AVA_MAPPER__Exemption_Number__c is not blank, then the AvaTax for Salesforce Sales Cloud passes the value to the exemptionNo field. • The maximum field length is of 25 characters.
19.	Opportunity	AVA_SFCLOUD__Entity_Use_Code__c	customerUsageType	• Required: No • Data Type: String Example: ABC123	• This field is available on the Accounts (Mapper field) and Opportunity (AvaTax for Salesforce Sales Cloud field). • If a new Opportunity record is created, or Account record is changed on the Opportunity, then the AvaTax updates the value on the Opportunity from the Accounts Entity/Use code. • If AVA_SFCLOUD__Entity_Use_Code__c is not blank, then the AvaTax for Salesforce Sales Cloud passes the value to the customerUsageType field. • The maximum field length is of 25 characters.

Sr. No.	Salesforce Object	Salesforce Field (API Name)	AvaTax Object	Details	Descriptions
20.	Opportunity	AVA_SFCLOUD__Is_Seller_Importer_Of_Record__c	isSellerImporterOfRecord	• Required: No • Data Type: Boolean Example: True/False	• This field is available on the Accounts (AvaTax Mapper field) and on the Opportunity (AvaTax for Salesforce Sales Cloud field). • If a new Opportunity record is created, or the Account record is changed on the Opportunity, then the AvaTax for Salesforce Sales Cloud updates the value on the Opportunity from the Accounts isSellerImporterOfRecord flag.
			Line Item		
21.	Opportunity Product	• AVA_SFCLOUD__SalesTax_Line__c • AVA_SFCLOUD__Allow_Tax_Override__c • AVA_SFCLOUD__Tax_Override__c	TaxOverride.TaxAmount	• Required: No • Data Type: Decimal Example: 123	• Available at line level of the Opportunity. • The AVA_SFCLOUD__SalesTax_Line__c field displays the tax amount which is returned by the AvaTax GetTax service. • If the user changes the Sales Tax field value and the Tax Override check box is selected in the AvaTax Configuration and at the Opportunity line level, then the revised value passes as the Tax Override Amount. • Tax Override Reason - Tax Override Amount. • Tax Override Type – TaxAmount.
22.	Opportunity Product	Quantity	Quantity	• Required: No • Data Type: Decimal Example: 1	• Product quantity is available at Opportunity line level.
23.	Product	AVA_SFCLOUD__Tax_Code__c	TaxCode	• Required: No • Data Type: String Example: P0000000	• If a value is available in the Tax Code field, then it passes as a Tax Code or else a blank value is passed, and the AvaTax GetTax service considers a default Tax Code - P0000000. • The maximum field length is of 50 characters.

Sr. No.	Salesforce Object	Salesforce Field (API Name)	AvaTax Object	Details	Descriptions
24.	Product	• AVA_SFCLOUD__UPC__c • Product.ProductCode • Product.Name	ItemCode	• Required: No • Data Type: String Example: ABC	• AvaTax for Salesforce Sales Cloud configuration determines to enable UPC or not. • If UPC is enabled, then the AvaTax for Salesforce Sales Cloud gives the first preference to the UPC. • Second preference is given to the ProductCode. • Third preference is given to the Product Name. • The maximum field length is of 50 characters.
25.	Opportunity Product	TotalPrice	Amount	• Required: No • Data Type: Decimal Example: 100.00	• Avalara AvaTax calculates the tax based on the amount available in the Total Price field.
26.	Product	Product.Description	Description	• Required: No • Data Type: String Example: Product Description	• Product description available on the Product object. • AvaTax GetTax service does not accept more than 2048 characters.

4.2. Quote

Sr. No.	Salesforce Object	Salesforce Field (API Name)	AvaTax Object	Details	Descriptions
1.	Account	• Account.AccountNumber • Account.Name	CustomerCode	• Required: Yes • Data Type: String Example: 0011Y00002GPqw1	• If Account Number is available, then it passes the Account Number value as a CustomerCode or else it passes the account name is passes as a CustomerCode. • AvaTax GetTax service does not accept more than 50 characters.
2.	Quote	CreatedDate	DocDate	• Required: Yes • Data Type: DateTime Example: 02/27/2018	• AvaTax for Salesforce Sales Cloud passes the Quote CreatedDate as DocDate.
3.	AvaTax	AVA_SFCLOUD__Company_Code__c	CompanyCode	• Required: No • Data Type: String Example: default	• AvaTax for Salesforce Sales Cloud has provided an AvaTax Configuration page where a user can select the Company Code from the drop-down option. • This Company Code value is stored in the Salesforce Custom Settings. • MultiCompany Settings tab has provided in the AvaTax Configuration page to map the multiple AvaTax companies.
4.	Quote	Id	DocCode	• Required: No • Data Type: String Example: AbC123	• AvaTax for Salesforce Sales Cloud passes the maximum of 18 characters of Opportunity ID as a DocCode.

Sr. No.	Salesforce Object	Salesforce Field (API Name)	AvaTax Object	Details	Descriptions
5.	N/A	N/A	debugLevel	Required: No Data Type: String Example: Normal	• AvaTax for Salesforce Sales Cloud does not pass any value to the AvaTax Service. • It is considered as a default value and passes "Normal" to the AvaTax Service.
6.	AvaTax	AVA_SFCLOUD__Street__c	ShipFrom Line1	• Required: No • Data Type: String Example: 900 Winslow way e	• If the MultiCompany Settings is configured and the address of the mapped company is available, then the Line1 address of the mapped company will be passed as a ShipFrom Line1 address or else the ShipFrom Line1 of the Corporate Address from the AvaTax Configuration page is considered. • AvaTax for Salesforce Sales Cloud has provided an AvaTax Configuration page where a user can enter the Origin Street address. • The Street address is stored in the AvaTax Custom Settings of the Salesforce. • The maximum field length is of 50 characters.
7.	AvaTax	AVA_SFCLOUD__City__c	ShipFrom City	• Required: No • Data Type: String Example: Bainbridge	• If the MultiCompany Settings is configured and the address of the mapped company is available, then the City address of the mapped company will be passed as a ShipFrom City address or else the ShipFrom City of the Corporate Address from the AvaTax Configuration page is considered. • AvaTax for Salesforce Sales Cloud has provided an AvaTax Configuration page where a user can enter the Origin City address. • The City address is stored in the Salesforce Custom Setting. • The maximum field length is of 50 characters.

Sr. No.	Salesforce Object	Salesforce Field (API Name)	AvaTax Object	Details	Descriptions
8.	AvaTax	AVA_SFCLOUD__State__c	ShipFrom State	• Required: No • Data Type: String Example: WA	• If the MultiCompany Settings is configured and the address of the mapped company is available, then the State address of the mapped company will be passed as a ShipFrom State address or else the ShipFrom State of the Corporate Address from the AvaTax Configuration page is considered. • AvaTax for Salesforce Sales Cloud has provided an AvaTax Configuration page where a user can enter the Origin State address. • The State address is stored in the Salesforce Custom Settings. • The maximum field length is of 50 characters.
9.	AvaTax	AVA_SFCLOUD__Country__c	ShipFrom Country	• Required: No • Data Type: String Example: US	• If the MultiCompany Settings is configured and the address of the mapped company is available, then the Country address of the mapped company will be passed as a ShipFrom Country address or else the ShipFrom Country of the Corporate Address from the AvaTax Configuration page is considered. • AvaTax for Salesforce Sales Cloud has provided an AvaTax Configuration page where a user can enter the Origin Country address. • The Country address is stored in the Salesforce Custom Settings. • The maximum field length is of 50 characters.
10.	AvaTax	AVA_SFCLOUD__Postal_Code__c	ShipFrom PostalCode	• Required: No • Data Type: String Example: 98110	• If the MultiCompany Settings is configured and the address of the mapped company is available, then the PostalCode of the mapped company will be passed as a ShipFrom PostalCode or else the ShipFrom PostalCode of the Corporate Address PostalCode from the AvaTax Configuration page is considered. • AvaTax for Salesforce Sales Cloud has provided an AvaTax Configuration page where a user can enter the Origin Postal Code address. • The Postal Code address is stored in the Salesforce Custom Settings. • The maximum field length is of 11 characters.
11.	Quote	• ShippingStreet • BillingStreet	ShipTo Line1	• Required: No • Data Type: String Example: 900 Winslow way e	• If the Shipping Street address detail is available, then it is passed in a ShipTo address Line1, or else Billing Street address detail is considered. • The maximum field length is of 50 characters.

Sr. No.	Salesforce Object	Salesforce Field (API Name)	AvaTax Object	Details	Descriptions
12.	Quote	• ShippingCity • BillingCity	ShipTo City	• Required: No • Data Type: String Example: BI	• If the Shipping City address detail is available, then it is passed in a ShipTo City address or else Billing City address detail is considered. • The maximum field length is of 50 characters.
13.	Quote	• ShippingState • BillingState	ShipTo State	• Required: No • Data Type: String Example: WA	• If the Shipping address is available, then the AvaTax for Salesforce Sales Cloud passes Shipping State value as State or else Billing State value is passed.
14.	Quote	• ShippingCountry • BillingCountry	ShipTo Country	• Required: No • Data Type: String Example: US	• If the Shipping State address detail is available, then it is passed in a ShipTo State address or else Billing State address detail is considered. • The maximum field length is of 50 characters.
15.	Quote	• ShippingPostalCode • BillingPostalCode	ShipTo PostalCode	• Required: No • Data Type: String Example: 98110	• If the Shipping PostalCode address detail is available, then it is passed in a ShipTo PostalCode or else Billing PostalCode is considered. • The maximum field length is of 11 characters.
16.	Quote	AVA_SFCLOUD__Tax_Date__c	TaxOverride.TaxDate	• Required: No • Data Type: Date Example: 02/27/2018	• It is used for Tax Date Override functionality. • Provided with a custom field for the tax date. • If a new Quote record is created, then the AvaTax for Salesforce Sales Cloud copies the Quote CreatedDate in the Tax Date field. • If the user modifies the tax date, then the AvaTax for Salesforce Sales Cloud passes the revised date, as a Tax Date Override. • Tax Override Reason - Tax Date Override. • Tax Override Type – TaxDate.
17.	Account	AVA_MAPPER__Business_Identification_Number__c	businessIdentificationNo	• Required: No • Data Type: String Example: ABC123	• This field is the AvaTax Mapper custom field. • If AVA_MAPPER__Business_Identification_Number__c is not blank, then the AvaTax for Salesforce Sales Cloud passes the value to the businessIdentificationNo field. • The maximum field length is of 25 characters.

Sr. No.	Salesforce Object	Salesforce Field (API Name)	AvaTax Object	Details	Descriptions
18.	Account	AVA_MAPPER__Exemption_Number__c	exemptionNo	• Required: No • Data Type: String Example: ABC123	• This field is the AvaTax Mapper custom field. • If AVA_MAPPER__Exemption_Number__c is not blank, then the AvaTax for Salesforce Sales Cloud passes the value to the exemptionNo field. • The maximum field length is of 25 characters.
19.	Quote	AVA_SFCLOUD__Entity_Use_Code__c	customerUsageType	• Required: No • Data Type: String Example: ABC123	• This field is available on the Accounts (Mapper field) and Quote (AvaTax for Salesforce Sales Cloud field). • If a new Quote record is created, or Account record is changed on the Quote, then the AvaTax for Salesforce Sales Cloud updates the value on the Quote from the Accounts Entity/Use code. • If AVA_SFCLOUD__Entity_Use_Code__c is not blank, then the AvaTax for Salesforce Sales Cloud passes the value to the customerUsageType field. • The maximum field length is of 25 characters.
20.	Quote	AVA_SFCLOUD__Is_Seller_Importer_Of_Record__c	isSellerImporterOfRecord	• Required: No • Data Type: Boolean Example: True/False	• This field is available on the Accounts (AvaTax Mapper field) and Quote (AvaTax for Salesforce Sales Cloud field). • If a new Quote record is created, or Account record is changed on the Quote, then the AvaTax for Salesforce Sales Cloud updates the value on the Quote from the Accounts isSellerImporterOfRecord flag.
Line Item					
21.	Quote Product	• AVA_SFCLOUD__SalesTax_Line__c • AVA_SFCLOUD__Allow_Tax_Override__c • AVA_SFCLOUD__Tax_Override__c	TaxOverride.TaxAmount	• Required: No • Data Type: Decimal Example: 123	• Available at line level of the Quote. • The AVA_SFCLOUD__SalesTax_Line__c field displays the tax amount which is returned by the AvaTax GetTax service. • If the user changes the Sales Tax field value and the Tax Override check box is selected in the AvaTax Configuration and at the Opportunity line level, then the revised value passes as the Tax Override Amount. • Tax Override Reason - Tax Amount Override. • Tax Override Type – TaxAmount.
22.	Quote Product	Quantity	Quantity	• Required: No • Data Type: Decimal Example: 1	• Product quantity available at Quote line level.

Sr. No.	Salesforce Object	Salesforce Field (API Name)	AvaTax Object	Details	Descriptions
23.	Product	AVA_SFCLOUD__Tax_Code__c	TaxCode	• Required: No • Data Type: String Example: P0000000	• If a value is available in the Tax Code field, then it passes as a Tax Code or else a blank value is passed, and the AvaTax GetTax service considers a default Tax Code - P0000000. • The maximum field length is of 50 characters
24.	Product	• AVA_SFCLOUD__UPC__c • Product.ProductCode • Product.Name	ItemCode	• Required: No • Data Type: String Example: ABC	• AvaTax for Salesforce Sales Cloud configuration determines to enable UPC or not. • If UPC is enabled, then the first preference is given to the UPC code. • Second preference is given to the ProductCode. • Third preference is given to the Product Name. • The maximum field length is of 50 characters.
25.	Quote Product	TotalPrice	Amount	• Required: No • Data Type: Decimal Example: 100.00	• Avalara AvaTax calculates the tax based on the amount available in the Total Price field.
26.	Product	Product.Description	Description	• Required: No • Data Type: String Example: Product Description	• Product description available on the Product object. • AvaTax GetTax service does not accept more than 2048 characters.
			Shipping		
27.	Quote	ShippingHandling	Amount	• Required: Yes • Data Type: Decimal Example: 100.00	• If shipping amount is not blank or 0, then the AvaTax for Salesforce Sales Cloud passes a separate line item as a shipping.
28.	AvaTax	AVA_SFCLOUD__Shipping_Code__c (Lookup of Shipping Code AvaTax custom object)	TaxCode	• Required: No • Data Type: String Example: FR	• If shipping amount is not blank or 0, then the AvaTax for Salesforce Sales Cloud passes a separate line item as a shipping. • If the user selects a Shipping Code in AvaTax Configuration page, then the shipping name of Shipping_Code__c custom object passes as TaxCode or else passes a default value as FR.
29.	N/A	N/A	ItemCode	• Required: No • Data Type: String Example: FREIGHT	• AvaTax for Salesforce Sales Cloud passes Item Code as FREIGHT.

4.3. Order

Sr. No.	Salesforce Object	Salesforce Field (API Name)	AvaTax Object	Details	Descriptions
1.	Account	• Account.AccountNumber • Account.Name	CustomerCode	• Required: Yes • Data Type: String Example: 0011Y00002GPqw1	• If the Account Number is available, then it passes the Account Number value as CustomerCode or else account name is passed as a CustomerCode. • AvaTax GetTax service does not accept more than 50 characters.
2.	Order	CreatedDate	DocDate	• Required: Yes • Data Type: DateTime Example: 02/27/2018	• AvaTax for Salesforce Sales Cloud passes Order created date as DocDate.
3.	AvaTax	AVA_SFCLOUD__Company_Code__c	CompanyCode	• Required: No • Data Type: String Example: default	• AvaTax for Salesforce Sales Cloud has provided an AvaTax Configuration page where a user can select the Company Code from the drop-down option. • This Company Code value is stored in the Salesforce Custom Settings. • MultiCompany Settings tab has provided in the AvaTax Configuration page to map the multiple AvaTax companies.
4.	Order	Id	DocCode	• Required: No • Data Type: String Example: 123	• AvaTax for Salesforce Sales Cloud passes the maximum of 18 characters of Opportunity ID as a DocCode.
5.	N/A	N/A	debugLevel	• Required: No • Data Type: String Example: Normal	• AvaTax for Salesforce Sales Cloud does not pass any value to the AvaTax Service. • It is considered as a default value and passes "Normal" to the AvaTax Service.
6.	AvaTax	AVA_SFCLOUD__Street__c	ShipFrom Line1	• Required: No • Data Type: String Example: 900 Winslow way e	• If the MultiCompany Settings is configured and the address of the mapped company is available, then the Line1 address of the mapped company will be passed as a ShipFrom Line1 address or else the ShipFrom Line1 of the Corporate Address from the AvaTax Configuration page is considered. • AvaTax for Salesforce Sales Cloud has provided an AvaTax Configuration page where a user can enter the Origin Street address. • The Street address is stored in the AvaTax Custom Settings of the Salesforce. • The maximum field Length is of 50 characters.

Sr. No.	Salesforce Object	Salesforce Field (API Name)	AvaTax Object	Details	Descriptions
7.	AvaTax	AVA_SFCLOUD__City__c	ShipFrom City	• Required: No • Data Type: String Example: Bainbridge	• If the MultiCompany Settings is configured and the address of the mapped company is available, then the City address of the mapped company will be passed as a ShipFrom City address or else the ShipFrom City of the Corporate Address from the AvaTax Configuration page is considered. • AvaTax for Salesforce Sales Cloud has provided an AvaTax Configuration page where a user can enter the Origin City address. • The City address is stored in the Salesforce Custom Settings. • The maximum field length is of 50 characters.
8.	AvaTax	AVA_SFCLOUD__State__c	ShipFrom State	• Required: No • Data Type: String Example: WA	• If the MultiCompany Settings is configured and the address of the mapped company is available, then the State address of the mapped company will be passed as a ShipFrom State address or else the ShipFrom State of the Corporate Address from the AvaTax Configuration page is considered. • AvaTax for Salesforce Sales Cloud has provided an AvaTax Configuration page where a user can enter the Origin State address. • The State address is stored in the Salesforce Custom Settings. • The maximum field length is of 50 characters.
9.	AvaTax	AVA_SFCLOUD__Country__c	ShipFrom Country	• Required: No • Data Type: String Example: US	• If the MultiCompany Settings is configured and the address of the mapped company is available, then the Country address of the mapped company will be passed as a ShipFrom Country address or else the ShipFrom Country of the Corporate Address from the AvaTax Configuration page is considered. • AvaTax for Salesforce Sales Cloud has provided an AvaTax Configuration page where a user can enter the Origin Country address. • The Country address is stored in the Salesforce Custom Settings. • The maximum field length is of 50 characters.

Sr. No.	Salesforce Object	Salesforce Field (API Name)	AvaTax Object	Details	Descriptions
10.	AvaTax	AVA_SFCLOUD__Postal_Code__c	ShipFrom PostalCode	• Required: No • Data Type: String Example: 98110	• If the MultiCompany Settings is configured and the address of the mapped company is available, then the PostalCode of the mapped company will be passed as a ShipFrom PostalCode or else the ShipFrom PostalCode of the Corporate Address PostalCode from the AvaTax Configuration page is considered. • AvaTax for Salesforce Sales Cloud has provided an AvaTax Configuration page where a user can enter the Origin Postal Code address. • The Postal Code detail is stored in the Salesforce Custom Settings. • The maximum field length is of 11 characters.
11.	Order	• ShippingStreet • BillingStreet	ShipTo Line1	• Required: No • Data Type: String Example: 900 Winslow way e	• If the Shipping Street information is available, then it passes as a ShipTo address Line1, or else Billing Street information is considered. • The maximum field length is of 50 characters.
12.	Order	• ShippingCity • BillingCity	ShipTo City	• Required: No • Data Type: String Example: BI	• If the Shipping City information is available, then it passes as a ShipTo City or else Billing City information is considered. • The maximum field length is of 50 characters.
13.	Order	• ShippingState • BillingState	ShipTo State	• Required: No • Data Type: String Example: WA	• If the Shipping State information is available, then it passes as a ShipTo State or else Billing State information is considered. • The maximum field length is of 50 characters.
14.	Order	• ShippingCountry • BillingCountry	ShipTo Country	• Required: No • Data Type: String Example: US	• If the Shipping Country information is available, then it passes as a ShipTo Country or else Billing Country information is considered. • The maximum field length is of 50 characters.
15.	Order	• ShippingPostalCode • BillingPostalCode	ShipTo PostalCode	• Required: No • Data Type: String Example: 98110	• If the Shipping PostalCode information is available, then it passes as a ShipTo PostalCode or else Billing PostalCode is considered. • The maximum field length is of 11 characters.

Sr. No.	Salesforce Object	Salesforce Field (API Name)	AvaTax Object	Details	Descriptions
16.	Order	AVA_SFCLOUD__Tax_Date __c	TaxOverride.TaxDate	• Required: No • Data Type: Date Example: 02/27/2018	• It is used for Tax Override functionality. • Provided with a custom field for the Tax Date. • If a new Order record is created, then the AvaTax for Salesforce Sales Cloud copies the Order CreatedDate in the Tax Date field. • If the user modifies the tax date, then the AvaTax for Salesforce Sales Cloud passes the revised date, as a Tax Date Override. • Tax Override Reason - Tax Date Override. • Tax Override Type – TaxDate.
17.	Account	AVA_MAPPER__Business_I dentification_Number__c	businessIdentificationNo	• Required: No • Data Type: String Example: ABC123	• This is the AvaTax Mapper custom field. • If AVA_MAPPER__Business_Identification_Number__c is not blank, then the AvaTax for Salesforce Sales Cloud passes the value in the businessIdentificationNo field. • The maximum field length is of 25 characters.
18.	Account	AVA_MAPPER__Exemption _Number__c	exemptionNo	• Required: No • Data Type: String Example: ABC123	• This field is the AvaTax Mapper custom field. • If AVA_MAPPER__Exemption_Number__c is not blank, then the AvaTax for Salesforce Sales Cloud passes the value to the exemptionNo field. • The maximum field length is of 25 characters.
19.	Order	AVA_SFCLOUD__Entity_Use_Code__c	customerUsageType	• Required: No • Data Type: String Example: ABC123	• This field is available on the Accounts (Mapper field) and Order (AvaTax for Salesforce Sales Cloud field). • If a new Order record is created or Account record is changed on the Order, then the AvaTax for Salesforce Sales Cloud passes the value on the Order from the Accounts Entity/Use code. • If AVA_SFCLOUD__Entity_Use_Code__c is not blank, then the AvaTax for Salesforce Sales Cloud passes the value to the customerUsageType fields. • The maximum field length is of 25 characters.

Sr. No.	Salesforce Object	Salesforce Field (API Name)	AvaTax Object	Details	Descriptions
20.	Order	AVA_SFCLOUD__Is_Seller_Importer_Of_Record__c	isSellerImporterOfRecord	• Required: No • Data Type: Boolean Example: True/False	• This field is available on the Accounts (AvaTax Mapper field) and Order (AvaTax for Salesforce Sales Cloud field). • If a new Order record is created or Account record is changed on the Order, then the AvaTax for Salesforce Sales Cloud updates the value on the Order from the Accounts isSellerImporterOfRecord flag.
			Line Item		
21.	Order Product	• AVA_SFCLOUD__Sales_Tax_Amount_Line__c • AVA_SFCLOUD__Allow_Tax_Override__c • AVA_SFCLOUD__Tax_Override__c	TaxOverride.TaxAmount	• Required: No • Data Type: Decimal Example: 123	• Available at line level of the Order. • The AVA_SFCLOUD__Sales_Tax_Amount_Line__c field displays the tax amount which is returned by the AvaTax GetTax service. • If the user changes the Sales Tax field value and the Tax Override check box is selected in the AvaTax Configuration and at the Opportunity line level, then the revised value passes as the Tax Override Amount. • Tax Override Reason - Tax Amount Override. • Tax Override Type – TaxAmount.
22.	Order Product	Quantity	Quantity	• Required: No • Data Type: Decimal Example: 1	• Product quantity available at Order line level.
23.	Product	AVA_SFCLOUD__Tax_Code__c	TaxCode	• Required: No • Data Type: String Example: P0000000	• If a value is available in this field, then it passes as a Tax Code or else a blank value is passed and the AvaTax GetTax service considers a default Tax Code - P0000000. • The maximum field length is of 50 characters.
24.	Product	• AVA_SFCLOUD__UPC__c • Product.ProductCode • Product.Name	ItemCode	• Required: No • Data Type: String Example: ABC	• AvaTax for Salesforce Sales Cloud configuration determines to enable UPC or not. • If UPC is enabled, then the first preference is given to the UPC code. • Second preference is given to the ProductCode. • Third preference is given to the Product Name. • The maximum field length is of 50 characters.
25.	Order Product	TotalPrice	Amount	• Required: No • Data Type: Decimal Example: 100.00	• Avalara AvaTax calculates the tax based on the amount available in the Total Price field.

Sr. No.	Salesforce Object	Salesforce Field (API Name)	AvaTax Object	Details	Descriptions
26.	Product	Product.Description	Description	• Required: No • Data Type: String Example: Product Description	• Product description available on the Product object. • AvaTax GetTax service does not accept more than 2048 characters.

5.0. AvaTax Custom Fields

5.1. AvaTax Custom Settings

• When a user installs the AvaTax for Salesforce Sales Cloud, then the user gets a "Configure" Link on the installed package section.

• A Lightning component is used to display AvaTax Configuration options.

• AvaTax for Salesforce Sales Cloud is storing all the values in the Salesforce Custom Settings.

Sr. No.	Label	API Name	Data Type	Description
1.	Account ID	AVA_SFCLOUD__Account_ID__c	Text (10)	• Provided with a text box to enter the Account ID.
2.	Allow Tax Override	AVA_SFCLOUD__Allow_Tax_Override__c	Checkbox	• Provided with a checkbox to select whether they want to use Tax Amount Override functionality. • This is the master settings and the additional option given on the line level to override the tax amount. • If both the settings are checked, then the Tax Amount Override can be used. • By default, it would be unchecked.
3.	City	AVA_SFCLOUD__City__c	Text (50)	• Provided a text box to enter Origin City address.
4.	Company Code	AVA_SFCLOUD__Company_Code__c	Text (100)	• Provided with a drop down from which a user can select the Company Code. • This Company Code is used in the Opportunity, Quote, and Order for the tax calculation.
5.	Enable AvaTax Tax Calculation	AVA_SFCLOUD__Enable_AvaTax_Tax_Calculation__c	Checkbox	• Provided with a checkbox to enable the AvaTax Tax Calculation functionality. • If checked, then the AvaTax for Salesforce Sales Cloud calculates the tax on the Opportunity, Quote, and Order. • By default, it would be checked.

Sr. No.	Label	API Name	Data Type	Description
6.	Enable UPC Code as Item Code	AVA_SFCLOUD__Enable_UPC_Code_as_ItemCode__c	Checkbox	• Provided with a checkbox to enable UPC code as Item Code option. • If checked, then the AvaTax for Salesforce Sales Cloud provides the preference to the UPC code to be passed as item code. • If UPC code is not available, then the AvaTax for Salesforce Sales Cloud passes the Product Code as Item Code. • By default, it is unchecked.
7.	License Key	AVA_SFCLOUD__License_Key__c	Text (50)	• Provided with a text box to enter the AvaTax License Key.
8.	Street	AVA_SFCLOUD__Street__c	Text (100)	• Provided with a text box to enter the Origin Street address.
9.	Line 2	AVA_SFCLOUD__Line2__c	Text (255)	• Provided with a text box to enter the Origin Line 2 address.
10.	Line 3	AVA_SFCLOUD__Line3__c	Text (255)	• Provided with a text box to enter the Origin Line 3 address.
11.	State	AVA_SFCLOUD__State__c	Text (50)	• Provided with a text box to enter the Origin State address.
12.	Postal Code	AVA_SFCLOUD__Postal_Code__c	Text (11)	• Provided with a text box to enter the Origin Postal Code address.
13.	Country	AVA_SFCLOUD__Country__c	Text (50)	• Provided with a text box to enter the Origin Country address.
14.	Sandbox	AVA_SFCLOUD__Sandbox__c	Checkbox	• Provided with a checkbox to select AvaTax credentials mode (Production/Sandbox). • If checked, then the AvaTax for Salesforce Sales Cloud uses the Sandbox service URL for AvaTax Tax Calculation and for AvaTax Address Validation . • By default, it is unchecked.
15.	Save transactions to AvaTax	AVA_SFCLOUD__Save_transactions_to_AvaTax__c	Checkbox	• Provided with a checkbox to select an option to save transactions to AvaTax Update. • If checked, then the AvaTax for Salesforce Sales Cloud uses the Sandbox service URL for AvaTax Tax service and AvaTax Address Validation services. • By default, it is checked.
16.	Shipping Code	AVA_SFCLOUD__Shipping_Code__c	Text (50)	• Provided with a drop down to select the Shipping Code to be used for Freight line item. • If selected, then the AvaTax for Salesforce Sales Cloud uses the selected Shipping Code as a Tax Code in the Quote line item.
17.	Validate Addresses	AVA_SFCLOUD__Validate_Addresses__c	Checkbox	• Provided with a checkbox to enable the AvaTax Address Validation service.

5.2. Opportunity Custom Fields

Sr. No.	Label	API Name	Data Type	Description
			GetTax Request Fields	
1.	Calculate Tax	AVA_SFCLOUD__Calculate_Tax__c	Checkbox	• Select the Calculate Tax check-box to enable the automatic Tax Calculation functionality. • The user can create their workflow rule/process builder to enable this checkbox, and the AvaTax for Salesforce Sales Cloud calls the AvaTax GetTax service if this checkbox is selected. • When the user selects the checkbox, the AvaTax for Salesforce Sales Cloud calls the Apex Method by using Process builder.
2.	Tax Date	AVA_SFCLOUD__Tax_Date__c	Date	• Used for Tax Date Override functionality. • If AVA_SFCLOUD__Tax_Date__c is not empty, then the Opportunity date is saved as a Tax Date. • If a user modifies the Tax Date and it does not match with the transaction date, then the AvaTax for Salesforce Sales Cloud overrides the Tax Date. • Tax Override reason - Tax Date Override. • Tax Override Type - Tax Date.
3.	Entity/Use Code	AVA_SFCLOUD__Entity_Use_Code__c	Lookup (Entity/Use Code)	• It is used for exemption functionality using Entity/Use code. • Provided with a Lookup to the Entity/Use code custom object. • Using the "customerUsageType" field in the GetTax request
4.	Is Seller Importer Of Record	AVA_SFCLOUD__Is_Seller_Importer_Of_Record__c	Checkbox	• If checked, then it passes the IsSellerImporterOfRecord true value in the AvaTax GetTax service.
5.	AvaTax Doc Status	AVA_SFCLOUD__AvaTax_Doc_Status__c	Text (50)	• It displays the Opportunities transaction status as Temporary. • AvaTax for Salesforce Sales Cloud passes Opportunities transactions as a Sales Order. • The Sales Order transactions are not posted on the AvaTax Update Dashboard.

6.	AvaTax Message	AVA_SFCLOUD__AvaTax_Message__c	Long Text Area (32768)	• AvaTax for Salesforce Sales Cloud displays the tax calculation message.
				• Possible values are as below.
				  ○ Sales Tax Not Current: A tax has not been calculated, or a transaction has been modified, and tax needs to be calculated again.
				  ○ Sales Tax Current: Sales Tax is calculated, and the transaction is up-to-date with the tax amount.
				Note: A user should not edit this field value.

7.	Sales Tax	AVA_SFCLOUD__Sales_Tax__c	Currency (16, 2)	• Provided with a text box to display the Sales Tax amount returned from the AvaTax GetTax service. • AvaTax for Salesforce Sales Cloud uses the totalTax field of the GetTax result to display the tax amount.
8.	Invoice Message	AVA_SFCLOUD__Invoice_Message__c	Long Text Area (32768)	• It displays the invoice message received from the AvaTax Service.

5.3. Opportunity Product Fields

Sr. No.	Label	API Name	Data Type	Description
			GetTax Request Fields	
1.	Tax Override	AVA_SFCLOUD__Tax_Override__c	Checkbox	• Provided with a checkbox to override the tax line amount. • If "Tax Override" option is selected in the AvaTax Configuration and at line level, then the AvaTax for Salesforce Sales Cloud overrides the tax amount. • Tax Override Reason - Tax Amount Override. • Tax Override Type - Tax Amount.
2.	Sales Tax Amount	AVA_SFCLOUD__SalesTax_Line__c	Currency (16, 2)	• Provided with a text box to display the Sales Tax amount of a line item. • Using the "tax" field of the GetTax result to display the line tax amount.
3.	Sales Tax Details	AVA_SFCLOUD__Sales_Tax_Details__c	Long Text Area (32768)	• Provided with a text area to display the Sales Tax Details of the line item. • Combining Tax Rate, Tax Name, and Jurisdiction Name and display the value in this field. • Format as below: 'Rate: '+ rate*100+'% '+ ' '+ 'Tax Name : '+ taxName + ' '+'Juris Name ' + jurisName+' \n';
4.	Sales Tax Rate	AVA_SFCLOUD__Sales_Tax_Rate__c	Text (18)	• Provided with a text box to display the Sales Tax Rate of the line item. • Adding all the tax rate returned from the GetTax result and display in this field. • Using the "rate" field of the GetTax result to display the tax rate value.

5.4. Quote Custom Fields

Sr. No.	Label	API Name	Data Type	Description
			GetTax Request Fields	
1.	Calculate Tax	AVA_SFCLOUD__Calculate_Tax__c	Checkbox	• AvaTax for Salesforce Sales Cloud has given this check box to enable automatic tax calculation functionality. • A user can create their workflow rule/process builder to enable this checkbox and our AvaTax for Salesforce Sales Cloud that calls the AvaTax GetTax service if this checkbox is checked. • When a user selects the checkbox, AvaTax for Salesforce Sales Cloud calls the Apex Method using process builder.
2.	Tax Date	AVA_SFCLOUD__Tax_Date__c	Date	• It is used for Tax Date Override functionality. • If AVA_SFCLOUD__Tax_Date__c is not empty, then the quote date is saved as tax date. • If the user modifies the tax date and it does not match with the transaction date, then the AvaTax for Salesforce Sales Cloud overrides the Tax Date. • Tax Override Reason - Tax Date Override. • Tax Override Type - Tax Date.
3.	Entity/Use Code	AVA_SFCLOUD__Entity_Use_Code__c	Lookup (Entity/Use Code)	• It is used for exemption functionality using Entity/Use code. • Provided with a Look up to the Entity/Use code custom object. • Using the "customerUsageType" field in the GetTax request.

4.	Is Seller Importer Of Record	AVA_SFCLOUD__Is_Seller_Importer_Of_Record__c	Checkbox	• If checked, then it passes the isSellerImporterOfRecord true value in the AvaTax GetTax service.
5.	Shipping and Handling	ShippingHandling (Salesforce standard field)	Currency (16, 2)	• If any value is available in this field, then the AvaTax for Salesforce Sales Cloud is creating a new line item as a "Freight." • AvaTax for Salesforce Sales Cloud uses the Shipping Tax Code value in the AvaTax Configuration to pass as a Tax Code. • If a user does not set any value in the AvaTax Configuration field, then it passes "FREIGHT" as a Tax Code. • Line Quantity – 1. • Item Code – FREIGHT. • Description – S and H.
6.	AvaTax Doc Status	AVA_SFCLOUD__AvaTax_Doc_Status__c	Text (50)	• AvaTax for Salesforce Sales Cloud displays the status of Quote transaction with respect to AvaTax update status. • AvaTax for Salesforce Sales Cloud passes all the Opportunities record as a "Sales Order," so a user will see the status as "Temporary."

7.	AvaTax Message	AVA_SFCLOUD__AvaTax_Message__c	Long Text Area (32768)	• AvaTax for Salesforce Sales Cloud displays the Quote transaction status in this field.
				• Possible values are as below.
				  o Sales Tax Not Current: If a tax has not been calculated or a user modifies the transaction, then a user needs to calculate the tax again.
				  o Sales Tax Current: Sales Tax has been calculated, and the transaction is up-to-date with the tax amount.
				Note: A user should not edit this field value.

8.	Sales Tax	Tax (Salesforce standard field)	Currency (16, 2)	• Provided with a text box to display the sales tax amount returned from the AvaTax GetTax service. • AvaTax for Salesforce Sales Cloud uses the "totalTax" field of the GetTax result to display the tax amount.
9.	Invoice Message	AVA_SFCLOUD__Invoice_Message__c	Long Text Area (32768)	• It displays the invoice message received from the AvaTax Service.
10.	Shipping and Handling Tax	AVA_SFCLOUD__ShippingHandling_Tax__c	Currency (16, 2)	• If the user has added Shipping and Handling amount, then it passes a separate line item for the Freight. • In the GetTax result, AvaTax for Salesforce Sales Cloud is comparing the shipping item code to check the shipping line • Using the "Tax" field of the GetTax result of the shipping line to display the shipping tax in this field.

5.5. Quote Product Fields

Sr. No.	Label	API Name	Data Type	Description
			GetTax Request Fields	
1.	Tax Override	AVA_SFCLOUD__Tax_Override__c	Checkbox	• Provided with a checkbox to override the tax line amount. • If "Tax Override" option is selected in the AvaTax Configuration and at line level, then the AvaTax for Salesforce Sales Cloud override the tax amount. • Tax Override Reason - Tax Amount Override. • Tax Override Type - Tax Amount.
2.	Sales Tax Amount	AVA_SFCLOUD__SalesTax_Line__c	Currency (16, 2)	• Provided with a text box to display the Sales Tax amount of a line item. • Using the "tax" field of the GetTax result to display the line tax amount.
3.	Sales Tax Details	AVA_SFCLOUD__Sales_Tax_Details__c	Long Text Area (32768)	• Provided with a text area to display the Sales Tax Details of the line item. • Combining Tax Rate, Tax Name and Jurisdiction Name, and then display the value in this field. • Format as below: 'Rate: '+ rate*100+'% '+ ' '+ 'Tax Name: '+ taxName + ' '+'Juris Name ' + jurisName+' \n';
4.	Sales Tax Rate	AVA_SFCLOUD__Sales_Tax_Rate__c	Text (18)	• Provided with a text box to display Sales Tax Rate of the line item. • Adding all the tax rate returned from the GetTax result and displayed it in this field. • Using the "rate" field of the GetTax result to display the tax rate value.

5.6. Order Custom Fields

Sr. No.	Label	API Name	Data Type	Description
			GetTax Request Fields	
1.	Calculate Tax	AVA_SFCLOUD__Calculate_Tax__c	Checkbox	• Select the calculate tax check-box to enable the automatic tax calculation functionality. • User can create their workflow rule/process builder to enable this checkbox, and our AvaTax for Salesforce Sales Cloud calls the AvaTax GetTax service if this checkbox is checked. • When a user checks this checkbox, AvaTax for Salesforce Sales Cloud calls our Apex Method using the Process builder. • If the "Committed" status is available in the AvaTax Doc Status field, then the AvaTax for Salesforce Sales Cloud uses the CreateOrAdjust tax service to modify the document.

Sr. No.	Label	API Name	Data Type	Description
2.	Commit Tax	AVA_SFCLOUD__Commit_Tax__c	Checkbox	• AvaTax for Salesforce Sales Cloud has given this check box to commit the transaction using automatic tax calculation functionality. • User can create their workflow rule/process builder to enable this checkbox, and our AvaTax for Salesforce Sales Cloud calls the AvaTax GetTax service if this checkbox is checked. • When the user checks this checkbox, AvaTax for Salesforce Sales Cloud calls our Apex Method using the Process builder. • If the "Committed" status is available in the AvaTax Doc Status field, then the AvaTax for Salesforce Sales Cloud uses the CreateOrAdjust tax service to modify the document.
3.	Tax Date	AVA_SFCLOUD__Tax_Date__c	Date	• It is used for Tax Date Override functionality. • If it is not empty, then the opportunity date is saved as Tax Date. • If the user modifies the Tax Date and it does not match with the transaction date, then the AvaTax for Salesforce Sales Cloud overrides the tax date. • Tax Override Reason - Tax Date Override. • Tax Override Type - Tax Date.
4.	Entity/Use Code	AVA_SFCLOUD__Entity_Use_Code__c	Lookup (Entity/Use Code)	• It is used for exemption functionality using the Entity/Use code. • Provided with a Lookup to the Entity/Use code custom object. • Using the "customerUsageType" field in the GetTax request.
5.	Is Seller Importer Of Record	AVA_SFCLOUD__Is_Seller_Importer_Of_Record__c	Checkbox	• If checked, then it passes the isSellerImporterOfRecord true value in the AvaTax GetTax service.
6.	AvaTax Doc Status	AVA_SFCLOUD__AvaTax_Doc_Status__c	Text (50)	• AvaTax for Salesforce Sales Cloud displays the status of Order transaction with respect to AvaTax update status. • Possible values are as below: ○ Temporary: Not Saved to AvaTax for Salesforce Sales Cloud AvaTax. ○ Saved: Saved but not Posted/Committed to AvaTax for Salesforce Sales Cloud AvaTax. It is saved on the AvaTax for Salesforce Sales Cloud AvaTax having status as "Uncommitted." ○ Committed: Saved and Committed to AvaTax for Salesforce Sales Cloud.
7.	AvaTax Message	AVA_SFCLOUD__AvaTax_Message__c	Long Text Area (32768)	• AvaTax for Salesforce Sales Cloud displays the Order transaction status in this field. • Possible values are as below: ○ Sales Tax Not Current: A tax has not been calculated, or a transaction has been modified, and tax needs to be calculated again. ○ Sales Tax Current: Sales Tax has been calculated, and the transaction is up-to-date with the tax amount. **Note:** A user should not edit this field value.
8.	Sales Tax	AVA_SFCLOUD__Sales_Tax__c	Currency (16, 2)	• Provided with a text box to display the Sales Tax amount returned from the AvaTax GetTax service. • AvaTax for Salesforce Sales Cloud uses the "totalTax" field of the GetTax result to display the tax amount.
9.	Invoice Message	AVA_SFCLOUD__Invoice_Message__c	Long Text Area (32768)	• It displays the invoice message received from the AvaTax Service.

5.7. Order Product Fields

Sr. No.	Label	API Name	Data Type	Description
GetTax Request Fields				
1.	Tax Override	AVA_SFCLOUD__ Tax_Override__c	Checkbox	• Provided with a checkbox to override the tax line amount. • If "Tax Override" option is selected in the AvaTax Configuration and at line level, then the AvaTax for Salesforce Sales Cloud override the tax amount. • Tax Override Reason - Tax Amount Override. • Tax Override Type - Tax Amount.
2.	Sales Tax Amount	AVA_SFCLOUD__ Sales_Tax_Amoun t_Line__c	Currency (16, 2)	• Provided with a text box to display the Sales Tax amount of a line item. • Using the "tax" field of the GetTax result to display the line tax amount.
3.	Sales Tax Details	AVA_SFCLOUD__ Sales_Tax_Details __c	Long Text Area (32768)	• Provided with a text area to display the Sales Tax Details of the line item. • Combining Tax Rate, Tax Name, and Jurisdiction Name, and displays the value in this field. • Format as below: 'Rate: '+ rate*100+'% '+ ' '+ 'Tax Name: '+ taxName + ' '+'Juris Name ' + jurisName+' \n';
4.	Sales Tax Rate	AVA_SFCLOUD__ Sales_Tax_Rate__ c	Text (18)	• Provided with a text box to display Sales Tax Rate of the line item. • Adding all the tax rate returned from the GetTax result, and displays them in this field. • Using the "rate" field of the GetTax result to display the tax rate value.

6.0. Process Builder

6.1. Opportunity

6.1.1. AvaTax Opportunity - Automatic Tax Calculation

This process builder is used for the automatic tax calculation functionality. AvaTax for Salesforce Sales Cloud is setting messages in the AvaTax fields and calls the AvaTax Apex method.

a. Event: Created or Edited.

b. Criteria for this Action Group: Select the Calculate Tax (AVA_SFCLOUD__Calculate_Tax__c) checkbox.

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_SFCLOUD__OpportunityTaxCalculator
        Apex Variables: docId - Field Reference - [Opportunity].Id

6.1.2. AvaTax Opportunity - Clear Header AvaTax Custom Fields

This process builder is used specifically to clear the Opportunity AvaTax header custom fields while cloning the transaction. AvaTax for Salesforce Sales Cloud 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—Execute the actions

c. Immediate Actions:

    Update AvaTax custom field values:

    i.   AvaTax Doc Status = NULL

    ii.   AvaTax Message = NULL

    iii.   Invoice Message = NULL

    iv.   Sales Tax = NULL

    v.   Tax Date = [Opportunity].CreatedDate: If AvaTax for Salesforce Sales Cloud is creating a new Opportunity, then the AvaTax for Salesforce Sales Cloud is copying the transaction date in the Tax Date field. After a user modifies the Tax Date, AvaTax for Salesforce Sales Cloud uses the Tax Date Override method to override the date on the AvaTax Update.

6.1.3. AvaTax Opportunity Product - Clear AvaTax Product Custom Fields

This process builder is used specifically to clear the Opportunity AvaTax line level custom fields while cloning the transaction. AvaTax for Salesforce Sales Cloud 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

   iii. Sales Tax Rate = NULL

   iv. Tax Override = Uncheck the checkbox

6.1.4. AvaTax Opportunity Existing - Update Entity/Use code, IOR

If a user changes the Account on the existing Opportunity, 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 Opportunity

c. Immediate Actions:

   Update AvaTax custom field values:

   i. Entity/Use code = [Opportunity].Account.AVA_MAPPER__Entity_Use_code__c

   ii. Is Seller Importer Of Record
       = [Opportunity].Account.AVA_MAPPER_Is_Seller_Importer_Of_Record__c

6.1.5. AvaTax Opportunity New - Update Entity/Use code, IOR

If a user creates a new Opportunity, then the process builder updates the Entity/Use code, IOR field from the Accounts 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 = [Opportunity].Account.AVA_MAPPER__Entity_Use_code__c

   ii. Is Seller Importer Of Record
       = [Opportunity].Account.AVA_MAPPER_Is_Seller_Importer_Of_Record__c

6.1.6. AvaTax Opportunity - Update AvaTax Message and Status

This process builder updates the message in the AvaTax Message field to "Sales Tax Not Current". A user needs to calculate the tax again because a transaction has been modified which may impact the Sales Tax.

a. Event: Created or Edited

b. Criteria for this Action Group: Any one of the below field values have changed on the Opportunity object Account ID, Amount, Is Seller Importer Of Record, Entity/Use code, and Tax Date.

c. Immediate Actions:

Update AvaTax custom field value:
AvaTax Message = Sales Tax Not Current

6.2. Order

6.2.1. AvaTax Order - Automatic Tax Calculation

This process builder is used for the automatic tax calculation and automatic commit tax functionalities. AvaTax for Salesforce Sales Cloud is setting messages in our AvaTax fields and calling AvaTax Apex methods.

a. Event: Created or Edited

b. Criteria for this Action Group:

 i. Select the Commit tax checkbox.

- Immediate Actions:

Update AvaTax custom field values:

o AvaTax Message = Auto Sales Tax Calc Triggered - Refresh Your Browser For Result

o Calculate Tax = Uncheck the checkbox

o Commit Tax = Uncheck the checkbox

Call the Apex Method:

Class - AVA_SFCLOUD__OrderTaxCalculator

Apex variables:

docId = [Order].Id
commitStatus = True
docStatus = [Order].AvaTax_Doc_Status__c

 ii. Calculate Tax checkbox is checked but Commit tax checkbox is unchecked

- Immediate Actions -

Update AvaTax custom field values:

o AvaTax Message = Auto Sales Tax Calc Triggered - Refresh Your Browser For Result

o Calculate Tax = Uncheck the checkbox

       o   Commit Tax = Uncheck the checkbox

Call the Apex Method:

Class - AVA_SFCLOUD__OrderTaxCalculator

Apex variables:

docId = [Order].Id
commitStatus = False
docStatus = [Order].AvaTax_Doc_Status__c

6.2.2. AvaTax Order - Clear Header AvaTax Custom Fields

This process builder is used specifically to clear the Order AvaTax header custom fields while cloning the transaction. AvaTax for Salesforce Sales Cloud 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—Execute the actions.

c. Immediate Actions:

     Update AvaTax custom field values:

    i.   AvaTax Doc Status = NULL

   ii.   AvaTax Message = NULL

  iii.   Invoice Message = NULL

  iv.   Sales Tax = NULL

   v.   Tax Date = [Order].CreatedDate   - Whenever AvaTax for Salesforce Sales Cloud is creating a new Order, AvaTax for Salesforce Sales Cloud is copying transaction date in the Tax Date field. Once a user modifies the Tax Date, AvaTax for Salesforce Sales Cloud uses the Tax Date Override method to override the date on the AvaTax Update.

6.2.3. AvaTax Order Product - Clear Product AvaTax Custom Fields

This process builder is used specifically to clear the Order AvaTax line level custom fields while cloning the transaction. AvaTax for Salesforce Sales Cloud 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

  iii.   Sales Tax Rate = NULL

  iv.   Tax Override = Uncheck the checkbox

6.2.4. AvaTax Order Existing - Update Entity/Use code, IOR

If a user changes the Account on the existing Order, 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 Account ID is changed on the existing Order.

- 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

6.2.5. AvaTax Order New - Update Entity/Use code, IOR

If a new Order is created, 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

6.2.6. AvaTax Order - Update AvaTax Message and Status

This process builder updates the message in the AvaTax Message field to "Sales Tax Not Current." A user needs to calculate the tax again because a transaction has been modified which may impact the Sales Tax.

- a. Event: Created or edited

- b. Criteria for this Action Group: Any one of the below field value has been changed on the Order object, Account ID, Order ID, Pricebook entry, Total Amount, Billing Street, Billing City, Billing State, Billing Country, Billing Postal Code, Shipping Street, Shipping City, Shipping State, Shipping Country, Shipping Postal Code, Is Seller Importer Of Record, Entity/Use code, and Tax Date.

- c. Immediate Actions:

  Update AvaTax custom field value:

  AvaTax Message = Sales Tax Not Current

6.3. Quote

6.3.1. AvaTax Quote - Automatic Tax Calculation

This process builder is used for the automatic tax calculation.

 a. Event: Created or Edited

 b. Criteria for this Action Group: Select the Calculate Tax checkbox.

 c. Immediate Actions:

    Update AvaTax custom field values:

     i. AvaTax Message = Auto Sales Tax Calc Triggered - Refresh Your Browser For Result

     ii. Calculate Tax = Uncheck the checkbox

    Call the Apex Method:

    Class - AVA_SFCLOUD__QuoteTaxCalculator

    Apex variables:

    docId = [Quote].Id

6.3.2. AvaTax Quote Existing - Update Entity/Use code, IOR

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 Account ID is 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

6.3.3. AvaTax Quote New - Update Entity/Use code, IOR

If a new Quote is created, 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].Opportunity.Account.AVA_MAPPER__Entity_Use_code__c

     ii. Is Seller Importer Of Record
         = [Quote].Opportunity.Account.AVA_MAPPER_Is_Seller_Importer_Of_Record__c

6.3.4. AvaTax Quote - Update AvaTax Message

This process builder updates the message in the AvaTax Message field to "Sales Tax Not Current". A user needs to calculate the tax again because a transaction has been modified which may impact the Sales Tax.

a. Event: Created or Edited

b. Criteria for this Action Group: Any one of the below field value has changed on the Order object Account ID, Opportunity ID, Pricebook entry, Total Price, Billing Street, Billing City, Billing State, Billing Country, Billing Postal Code, Shipping Street, Shipping City, Shipping State, Shipping Country, Shipping Postal Code, Is Seller Importer Of Record, Entity/Use code, and Tax Date.

c. Immediate Actions:

Update AvaTax custom field value:
AvaTax Message = Sales Tax Not Current

7.0. How to Extend AvaTax Integration using the AvaTax Mapper?

AvaTax for Salesforce Sales Cloud refers to the "SFConfig" static resource file to calculate the tax and validate the addresses.

After you install the AvaTax for Salesforce Sales Cloud package, it creates a static resource file "SFConfig" in the customer's Salesforce environment having the package namespace as "AVA_SFCLOUD."

For any customization, a separate Static Resource file must be created in the local Salesforce environment having name same as "SFConfig" and of MIME Type as "text/xml."

AvaTax for Salesforce Sales Cloud verifies if the Static Resource file is available in the local environment, and then it gives preference to the local Static Resource file or else AvaTax for Salesforce Sales Cloud Static Resource file is referred for the Tax Calculation and Address Validation.