

Tax Exemption

If a customer wants to be set up as tax exempt, there's a few specific steps you'll need to take to make sure they can order exempt, whether they want to do that online or with a rep.

The first step is getting a copy of their exemption certificate. They may send this when they request the exemption, or you may have to request it from them. Every department and company has one of these, and if they try to say they don't clarify that you require a document that has either their FEIN or TID number on it. You cannot exempt their account without one.

Once you've got that, find their exemption number on the document. It can take multiple forms, but the most common one is XX-XXXXXXX.

On the customer's account, open the Exemptions window. Put the customer's exemption number on the top line, then click the green check mark button to fill it in all the other lines as well.

At this point, you'll have to create the customer's account in Avalara. If you're adding an exemption to an existing account always try searching the customer's number in Avalara first to see if they've been set up in the past. If not, click "Add a customer" in the upper right corner.

On this page, fill in all the boxes that have an asterisk next to them with the details you already put into Sage. For the Taxpayer ID, you can list the exemption number. ****During this step, it's very important to list the customer code correctly. The customer code is their account number in Sage with two zeros at the beginning. Without these zeros, their exemption will not sync.****

Once you've filled that in, click "Save and add certificate". This will take you to a new page where you'll list the state that the exemption is active in, the reason for the exemption, and the exemption number again.

Once this is set up, it should automatically sync with Sage. If it doesn't, you may need to wait a few minutes or double check that the details are correct in Avalara.

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