



"Together, Avalara and Shopify are building on the value we've been bringing to Shopify Plus customers for nearly a decade to all Shopify customers, enabling them to transact, comply, and scale globally with confidence."

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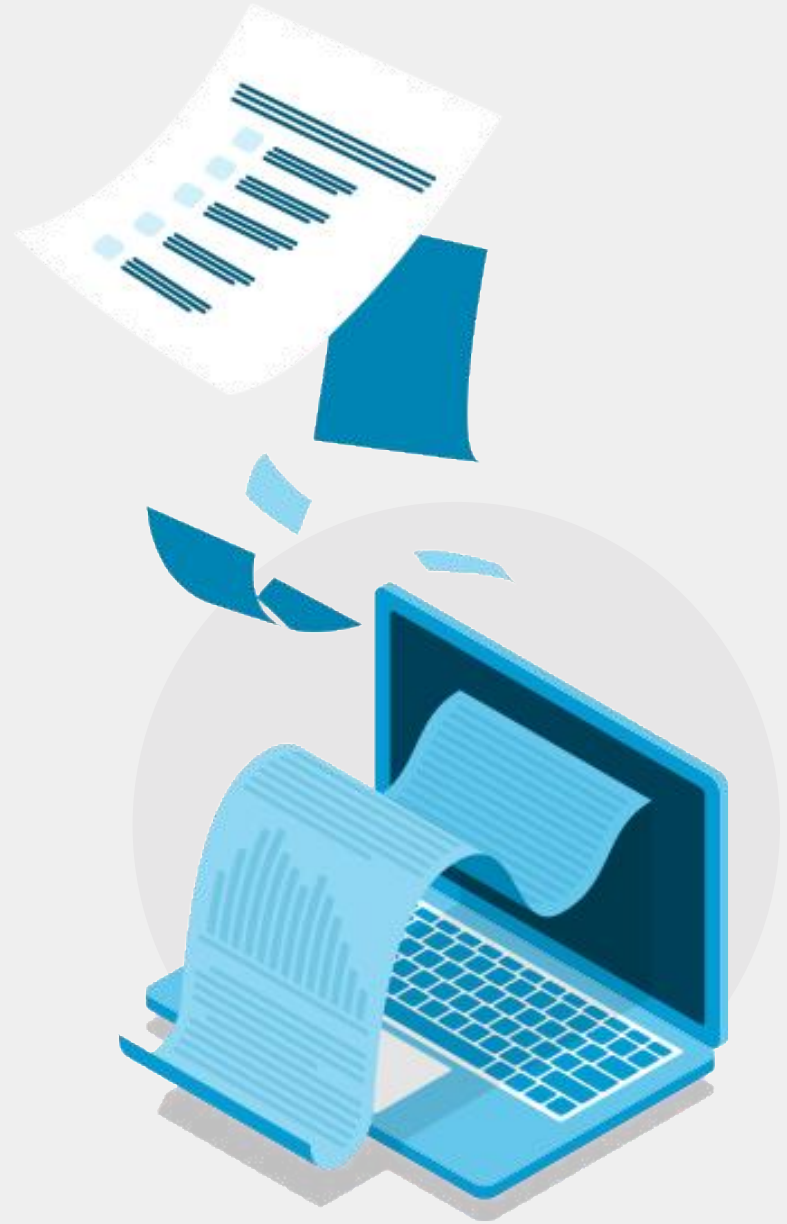
BOBBY MORRISON, CHIEF REVENUE OFFICER, SHOPIFY

Switch to the new Avalara for Shopify integration



Disclaimer

While we hope you'll find this discussion helpful, this session is for informational purposes only and is not legal or tax advice.



Avalara

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Introductions



Patrick Neu

Director, Strategic Partnerships
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Director, Shopify Accounts

Agenda

- › Quick Refresher: Current State
- › What changed, and what does it mean for you
- › Benefits and features of making the switch
- › How to purchase and install Avalara for Shopify
- › Q&A



**> Quick Refresher:
Current State**

What makes tax compliance so challenging?

A day in the life



Tax research



Calculating the correct tax amount



Consumer use tax



Managing exempt sales



Property tax



Registration and licenses



Remitting returns

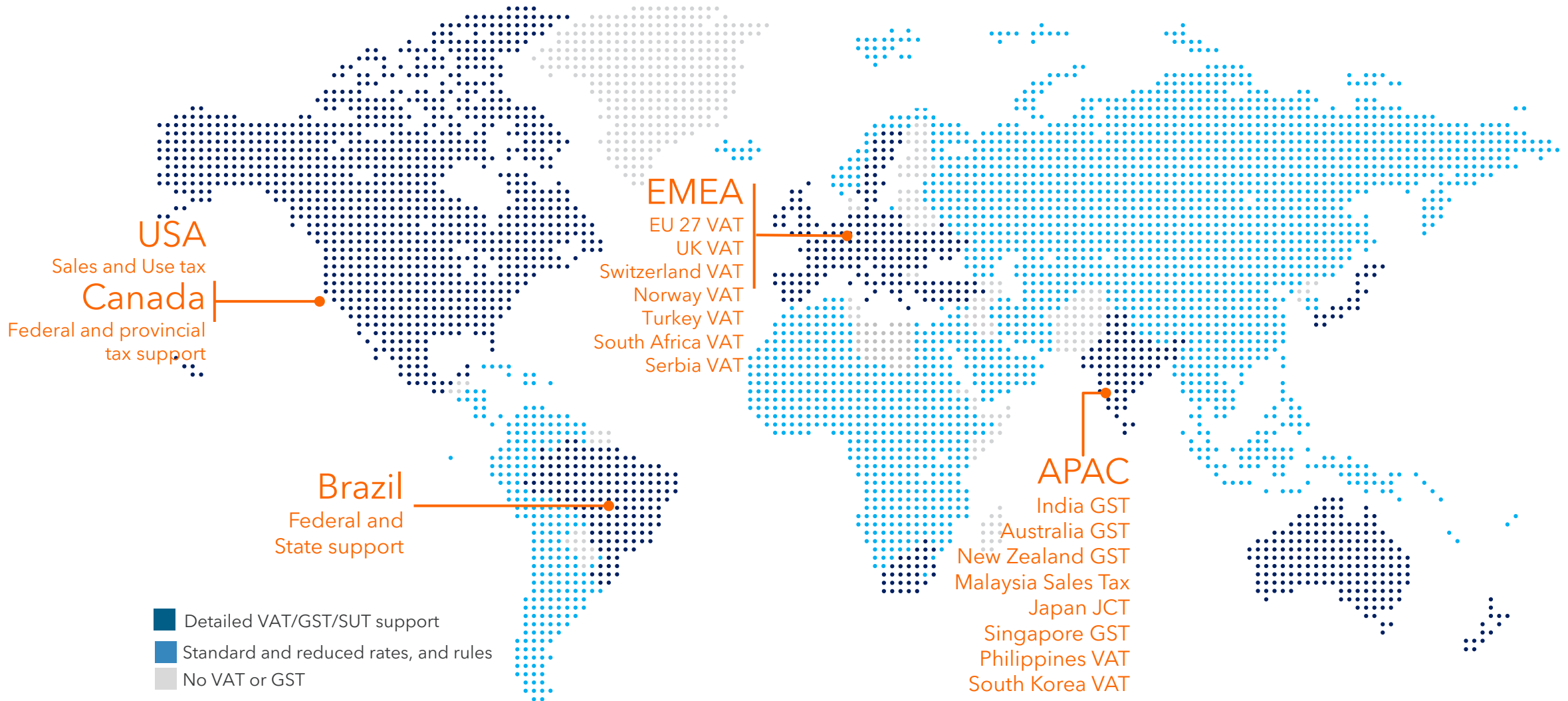


Navigating nexus



International compliance

Avalara: Indirect Tax Content and Calculation



Global Tax Compliance for Shopify

Calculate rates, prepare returns, manage exemption certificates on your Shopify transactions



Integrate seamlessly

Sync sales data across your platforms and tools with 1,200+ signed partner integrations



Drive efficiencies

Integrate Avalara solutions into your existing workflows to automate compliance across your organization



Stay compliant

Assign item classification, calculate sales and use tax, sync data for returns, and manage exemptions within your system



Reduce risk

Reduce your audit risk with more accurate sales and use tax information that is updated regularly across every state



Scalable

Facilitate interaction with the full suite of Avalara solutions to support compliance needs as your organization expands into new markets

9 years

of partnership with Shopify

7,000+

Shopify customers

What changed, and
> what does it means for
you

The Shopify Tax Platform



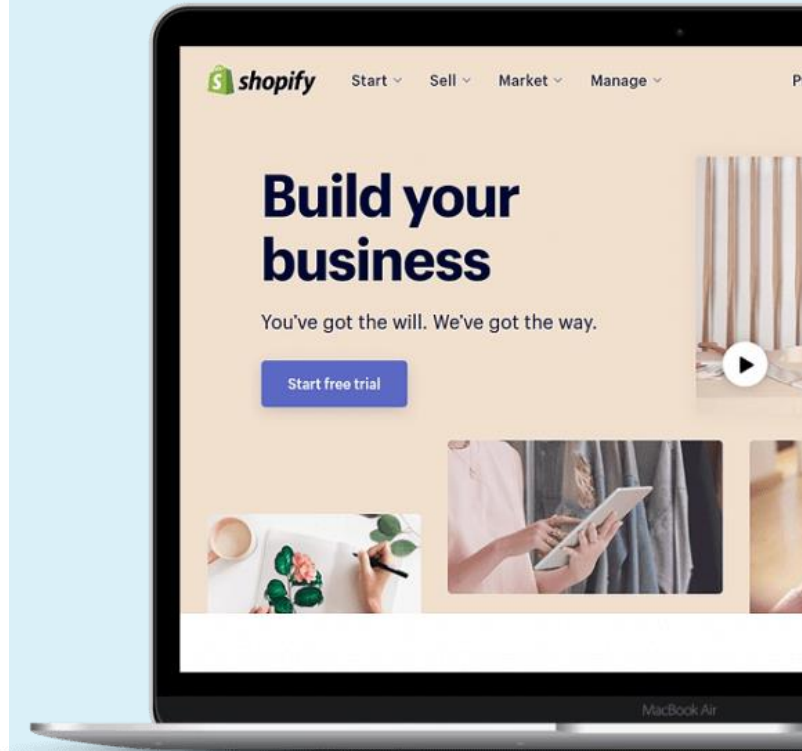
A tax platform that provides merchants with a 3P tax service that meets them where their **tax needs** are and is flexible enough to **grow with** their business.



A tax platform that addresses the complexities that come with selling in **niche verticals**, and **across multiple global tax jurisdictions**.



A tax platform that gives merchants the **choice** to choose **who**, **when**, and **how** taxes are calculated.



Avalara has a new connector available on the Shopify Tax Platform

- ✓ Built, sold, and supported **directly** by Avalara
- ✓ Available for Shopify users on **any** plan
- ✓ Enhanced **features & functionality**
- ✓ Replaces the legacy AvaTax for Shopify Plus connector that Shopify is **deprecating in April 2025**



The benefits and
> features of making the
switch

What's new?

PREVIOUS CONNECTOR:

AvaTax for Shopify Plus

- Available to Shopify Plus users only
- Built and maintained by Shopify
- Separate contract with Shopify needed

NEW CONNECTOR:

AvaTax with Avalara for Shopify

- Available to Shopify users on any plan
- Built and maintained by Avalara
- Sold by Avalara like your other products
- Direct support available and continued improvements from Avalara

And, new features! See next slide.

What will stay the same?

A merchant's AvaTax settings will remain the same upon switching to the new integration.

Features in Avalara for Shopify



Partial refunds

Supports partial refunds and exchange functionality for individual items with an order



Global tax calculation

Supports Value Added Tax (VAT) calculation, including B2B VAT



Exempt customers

Submit exemption certificates at checkout (requires ECM subscription)



Item/Product sync

Enables one-way sync of essential product catalog information from Shopify to Avalara

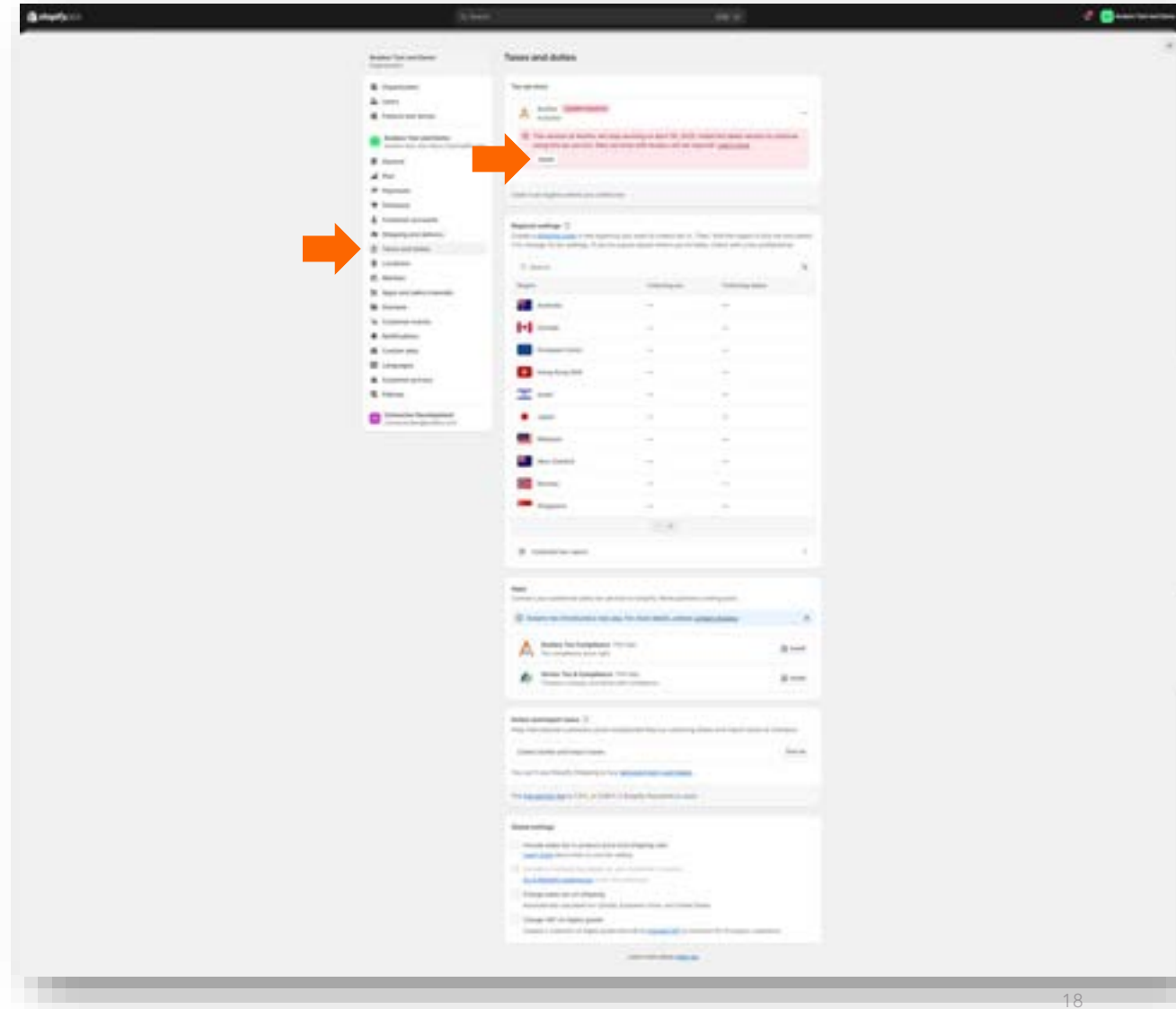
How to > purchase Avalara for Shopify

Where to find the new Avalara integration

Contact Avalara for pricing and assistance for the new integration.

Then, install and activate the Avalara Tax Compliance app within your Shopify admin.

1. *Go to Settings*
2. *Select Taxes and duties*
3. *Select Avalara Tax Compliance*





**> How to install Avalara
for Shopify**

Next steps...

Want to learn more, ready to make the switch?



Ready to talk with the Avalara for Shopify account specialist team?

- Call 800-297-8855 between 5 a.m.-5 p.m. PT Monday-Friday
- [Submit a contact form](#)



Want to learn a little more about the new integration?

- [Visit our Knowledge Center](#)
- [Visit the Shopify Help page](#)

Top 5 takeaways

Switching to the new Avalara for Shopify integration

1

Shopify is deprecating the legacy AvaTax for Shopify Plus plan on April 30, 2025

2

The new Shopify integration is built and sold directly by Avalara and is available to you today

3

The new integration has enhanced features and functionality like support for VAT calculation, Exemption Certificate Management, and more

4

Switch to the new integration for the same price you pay Shopify today by purchasing from our dedicated team

5

After purchasing, follow our step-by-step guide to easily get set up

Q&A

Thank you