

Retail

Retailers' guide to tax compliance automation

Evaluation criteria for choosing the right tax technology solutions for your retail business



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ABOUT AVALARA

Avalara is redefining how businesses manage tax and compliance by embedding AI agents directly into the tools, systems, and workflows where compliance occurs, including ERPs, ecommerce platforms, POS solutions, email applications, and web browsers. Backed by a legacy of 20+ years of providing innovative solutions for tax and compliance, these agents don't just assist – they complete tasks and do the work. Using expertise, speed, and precision, Avalara agents calculate taxes, file returns, validate data, and manage jurisdictional rules and global e-invoicing requirements for businesses worldwide. With one of the largest and regularly updated collections of tax content, Avalara Agentic Tax and Compliance™ is trusted by over 43,000 businesses in 75+ countries.

Learn why at avalara.com.

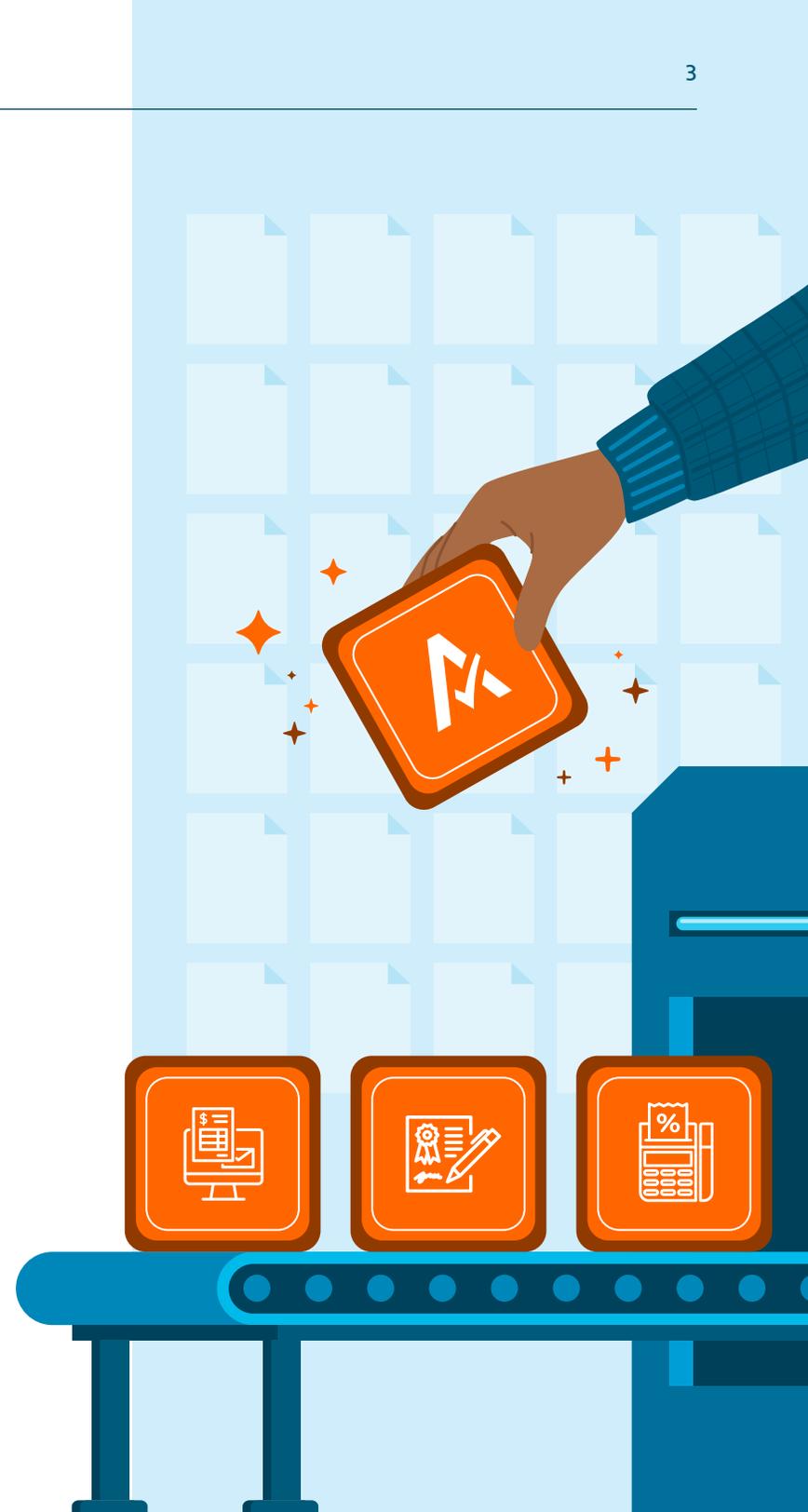
Tax compliance is a significant undertaking for retailers, and its complexity increases as retail businesses grow and evolve.

As operations expand, retailers must manage a higher volume of transactions across an expanding footprint while maintaining accuracy and consistency.

At the same time, regulatory requirements continue to change, placing pressure on systems and processes that are often not designed to adjust continuously. Over time, this makes it harder for retailers to keep pace using manual workflows.

Tax compliance automation, supported by AI-enabled capabilities, can help retailers manage growing compliance demands more effectively.

This guide provides a structured framework for evaluating, comparing, and selecting tax compliance automation solutions aligned to the needs of retail businesses.



Trends driving urgency to automate tax compliance

Increasing complexity of tax regulations

U.S. online retail sales are projected to reach \$1.6 trillion by 2028. As digital commerce continues to scale, retailers are selling into more states, more jurisdictions, and more regulatory environments than ever before.

This growth is occurring alongside tightening tax regulations. Economic nexus rules continue to expand, and transaction-based thresholds are losing ground, with **15 states already eliminating** them entirely.

Retailers are also increasingly managing multiple tax types, particularly as cross-border selling grows. Beyond sales tax, this includes VAT, GST, customs duties, and import

taxes. These obligations introduce additional requirements around product taxability and customer-facing duties.

At the same time, ongoing requirements such as retail delivery fees, shifting marketplace facilitator laws, and updated Form 1099-K reporting thresholds add further pressure. These changes often overlap, vary by jurisdiction, and can be modified with limited notice, making it harder for retailers to maintain consistent tax treatment at scale.

Automation and AI efficiency

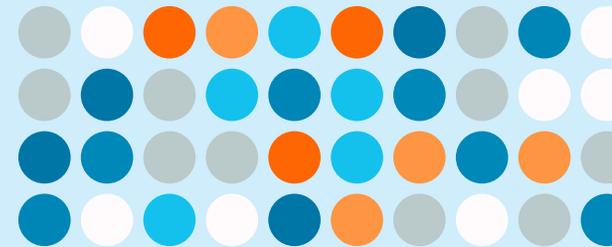
Keeping pace with evolving tax regulations can become increasingly difficult for retailers as requirements affect multiple parts of the business at once. Manual processes and

“The landscape of global business and tax compliance is becoming increasingly complex, driven by the growth in tax regulations and the digital economy. Organizations must embrace technology and ensure effective data management to navigate this challenging environment successfully.”

Kevin Permenter

**SENIOR RESEARCH DIRECTOR
ENTERPRISE APPLICATIONS
IDC**

Source: [IDC MarketScape](#)



legacy systems often struggle to keep tax logic aligned across transactions and systems.

With Avalara Agentic Tax and Compliance™, a new way to automate compliance across the business ecosystem, retailers can handle repetitive tasks, analyze large volumes of transaction data for compliance risks, and access near-real-time insights, helping improve efficiency and support accuracy in tax reporting.

Built as an agentic interface, Avi, Avalara's AI-powered assistant, enhances this intelligence further by observing tax data, recommending next steps, and – within clearly defined guardrails – helping support routine actions under the supervision of internal teams.

Looking ahead, AI and automation are reshaping how organizations manage compliance. **Danny Fields, Chief Technology and Customer Operations Officer at Avalara**, predicts that continuous, real-time compliance will replace periodic filings as governments demand instant visibility into transactions. According to Fields, "Compliance will evolve to be a continuous state beyond quarterly reporting. Continuity during disruption is now part of regulatory trust."

Government-mandated e-invoicing

Many governments are implementing electronic invoicing systems to combat tax evasion and improve revenue collection. More than 60 countries have announced or already require e-invoicing, and that number is expected to continue growing.

For retailers operating across regions or selling into regulated markets, these mandates introduce additional complexity. Compliance

often requires aligning tax determination, invoice generation, and data transmission with jurisdiction-specific rules, formats, and timelines. As requirements evolve, retailers must rely on automated solutions that can support ongoing compliance without disrupting transaction flows.

While the United States currently lags behind other regions in adopting formal e-invoicing mandates, federal- and state-level initiatives reflect **steps being taken** in digital reporting and standardization. Retailers

“E-invoicing is more than a matter of compliance – it’s about driving greater efficiency and innovation for future growth. As the market continues to evolve, organizations will have to be proactive in understanding regulatory changes, their impact on operations, and the merits of different vendors in this space to ensure they have the **right solutions** in the right markets at the right time.”

Charles Aladesuru

RESEARCH MANAGER, IDC EUROPEAN ENTERPRISE APPLICATIONS

with global operations or long-term growth plans may benefit from monitoring these developments and evaluating their potential impact over time.

Greater need for data-driven decision-making

As tax compliance becomes more interconnected, retailers need better ways to identify where issues are emerging across the business. Automation helps enable more proactive decision-making, allowing teams to address issues earlier.

This attention is especially important in scenarios where compliance challenges often emerge after the original transaction, including:

RETURNS AND RECOMMERCE

High return rates and resale flows can require amended filings and careful handling of tax credits, particularly when returns are processed after filing deadlines.

RETAIL DELIVERY FEES, BAG FEES, AND ENVIRONMENTAL CHARGES

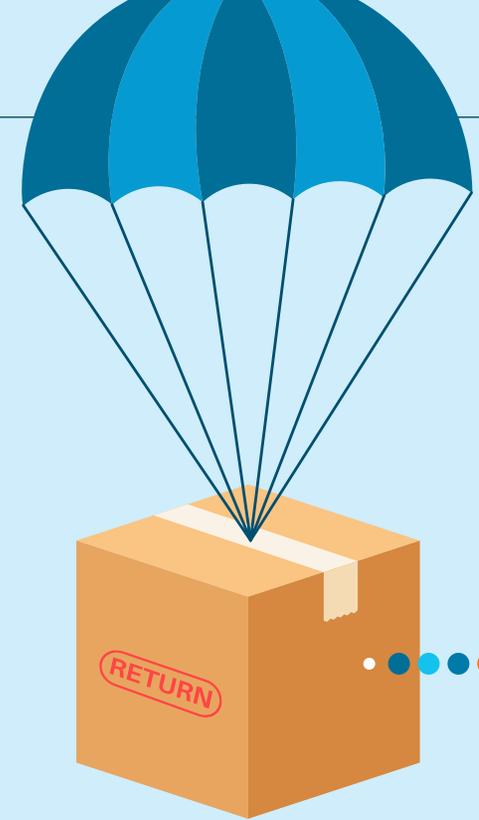
These fees are often calculated, reported, and remitted separately, with rules that vary by jurisdiction, increasing the risk of misreporting without transaction-level insight.

DROP SHIPPING AND MULTI-PARTY TRANSACTIONS

Transactions involving suppliers, retailers, and customers can make tax responsibility harder to determine and reconcile without centralized data.

POST-FILING ADJUSTMENTS AND AUDIT PREPARATION

Disconnected systems make it difficult to trace, validate, and defend tax positions when questions arise after returns are filed.



The business value of tax compliance automation for retailers

As compliance regulations continue to evolve, retailers realize value from tax compliance automation across key areas:

1. Improved efficiency and accuracy

- Support timely updates for tax law changes at local, state, and international levels
- Help apply the appropriate tax rates, exemptions, and rules across transactions and jurisdictions
- Improve consistency in tax application across high transaction volumes and peak periods where demand and transaction patterns fluctuate
- Support product and service classification based on applicable tax rates and rules including temporary exemptions and promotional scenarios

2. Reduced risk and enhanced compliance

- Provide access to comprehensive audit trails and supporting documentation across sales, returns, and adjustments
- Improve visibility into tax liabilities and compliance status with advanced reporting and analytics
- Help identify compliance risks, exceptions, and optimization opportunities
- Support high standards for data security and privacy



3. Streamlined process

- Automate calculations, filings, and audit preparation
- Reduce time spent on manual tasks, such as managing certificates or researching tax updates
- Consolidate tax-related data across systems to support strategic decisioning across sales, returns, and purchasing workflows
- Decrease cart abandonment by providing transparent and inclusive pricing at checkout for international shoppers, with consistent tax across all channels
- Enable a more unified approach to compliance across sales channels, purchasing workflows, and returns processes
- Integrate tax compliance capabilities with existing business systems

4. Ease of integration

- Integrate with existing ERP, accounting, CRM, ecommerce, and point-of-sale systems
- Offer APIs for custom integrations or legacy system support
- Support seamless API discovery and connectivity through model context protocol (MCP) servers for extended integrations.
- Accommodate changes, upgrades, or customizations as business requirements evolve

5. Scalability for growth and complexity

- Scale to handle increased transaction volumes, seasonal spikes, and entry into new jurisdictions
- Provide international capabilities for VAT, GST, and customs duties
- Adapt as business models, sales channels, transaction volumes, and regulatory requirements change without requiring extensive reconfiguration

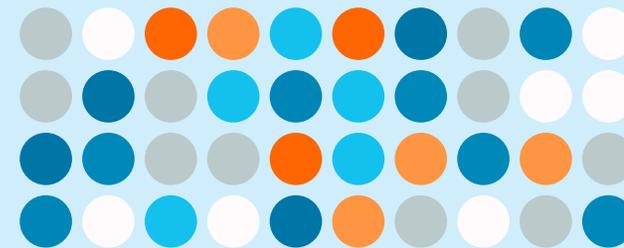
“In a time of rapidly accelerating innovation, the potential to transform compliance is immense. But companies need a more comprehensive end-to-end data strategy in order to fully leverage new tech such as AI.”

Nolan Ogden

U.S. TAX CHIEF TECHNOLOGY OFFICER

PwC

Source: [PwC](#)



Tax compliance solution evaluation criteria checklist

When evaluating tax compliance solutions, retailers should look for capabilities that help meet and maintain compliance obligations in a changing regulatory landscape. This includes solutions that combine automation with advanced AI features, supported by appropriate human oversight, to enable key compliance workflows within the systems businesses already use.

Avalara Agentic Tax and Compliance™ combines intelligent automation, trusted tax content, and configurable controls to help your business manage compliance activities more effectively.

Agentic AI and automation capabilities

- AI assistants that monitor tax data, suggest actions, and help execute routine tasks
- Explainable recommendations that clarify why each action is proposed
- Configurable controls aligned with your business policies and workflows
- Ability to learn from your data patterns while relying on trusted Avalara tax content

Tax calculation and management

- Tax rate determination for sales and use tax, VAT, GST, and customs duties
- Exemption validation and application for product classification and tax rules

- Retail tax rule support across jurisdictions, including promotions, bundles, resale, and temporary exemptions
- Tax calculation consistency across omnichannel sales, including stores, ecommerce, and marketplace transactions
- Determination of tax responsibility in drop shipping and multi-party transactions

Compliance automation

- Regular updates to tax rates, rules, and regulations
- Automated filing and remittance of tax returns
- Simplified nexus tracking and threshold monitoring

- Support for ongoing compliance adjustments as transactions, returns, and corrections occur
- Automated handling of retail delivery fees, bag fees, and environmental charges, including jurisdiction-specific reporting
- Support for zero-return requirements to prevent penalties when no tax is due
- AI-powered answers and tax insights with Avi for Tax Research

Audit and risk management

- Comprehensive record-keeping for all transactions and sales channels
- Tools to manage and validate exemption certificates
- Documentation to simplify external audits

- ❑ Anomaly and pattern detection that may indicate audit risk
- ❑ Maintenance of clear audit trails for marketplace and drop-ship transactions where responsibility may be shared

International tax management

- ❑ Automated VAT, GST, and customs duty compliance in 190+ countries
- ❑ Supported cross-border sales with accurate landed cost calculation, including duties and import taxes
- ❑ Accurate classification and reporting for cross-border shipments
- ❑ Regulatory compliance with e-invoicing and live reporting mandates

Reporting and analytics

- ❑ Advanced dashboards for tax liability, credit tracking, adjustments, and filing status
- ❑ Data insights for compliance and optimization
- ❑ Reporting that supports post-filing review, audit preparation, and reconciliation
- ❑ Risk identification features to help prioritize issues across channels and jurisdictions

Scalability and flexibility

- ❑ Ability to quickly handle large volumes of transactions and seasonal spikes
- ❑ Capability to grow with the business and accommodate new regions or markets
- ❑ Support for business models, including direct selling and MLM structures
- ❑ Flexibility to adapt to changing business requirements
- ❑ Compliance workflow customization for retail-specific operational needs

Integration and ease of use

- ❑ Integration with existing ERP, accounting, CRM, ecommerce, and point-of-sale systems, as well as marketplaces
- ❑ Consistent tax logic across all integrated systems
- ❑ APIs and other tools for custom integrations
- ❑ Simplification of existing processes and reduced maintenance
- ❑ Integrations for order management and point-of-sale systems, where transaction data and customer information are created

Security and data protection

- ❑ Robust security features to protect sensitive tax and financial data

- ❑ Compliance with data protection regulations (e.g., GDPR)
- ❑ Secure handling of W-9, 1099, vendor, and contractor information
- ❑ Controls over how automation tools access and store tax and transaction data

Cost and ROI

- ❑ Total cost of ownership, including licensing, implementation, ongoing support, and maintenance
- ❑ Potential return on investment through efficiency gains and reduced compliance risk
- ❑ Long-term cost implications, including how well the solution scales, adapts to regulatory change, and avoids technical debt as technology evolves

Vendor reputation and reliability

- ❑ Track record and reputation of the software provider
- ❑ Testimonials from other enterprise customers
- ❑ Financial stability and longevity of the vendor
- ❑ After-sale support and ongoing services to support long-term success
- ❑ Evidence of ongoing investment in tax content, technology, and advanced automation systems

The Avalara advantage: Different by design

Avalara's tech-forward solutions and industry expertise offer comprehensive tax compliance support for retailers operating at scale. Avalara combines automation, regularly updated tax content, and Agentic Tax and Compliance™ to help businesses manage compliance requirements more efficiently.

Extensive integration partnerships

Avalara serves and supports more than 43,000 customers in more than 75 countries through our vast global partner network of technology platforms, systems integrators, tax experts, and accountants. Avalara has more than 1,400 signed partner integrations with leading ERP, accounting, CRM, and ecommerce systems. Robust APIs further support custom integrations, enabling retailers to manage omnichannel operations while maintaining consistent tax treatment and automated compliance across channels.

Feature-rich products and services

Our solutions are designed to support the fast-changing tax challenges retailers face, including high transaction volumes, frequent regulatory updates, and the need to apply tax consistently across stores, ecommerce sites, marketplaces, and fulfillment models. Our software combines decades of tax expertise with enterprise-grade capabilities built to perform reliably in dynamic retail environments.

Avi, Avalara's AI-powered assistant for tax and compliance, supports these capabilities



AVALARA BY THE NUMBERS

Serves

43,000

customers
in 75+ countries

Manages compliance across

12,000+

U.S. sales and
use tax jurisdictions

Tax content for

190+

countries



by helping businesses navigate complex tax data, surface relevant insights, recommend next steps, and assist with routine compliance tasks under appropriate human oversight. For retailers, this support can help improve consistency in tax treatment, reduce manual effort during peak periods or promotional events, and enable faster identification and resolution of potential issues as business conditions and regulations change.

Expert help when you need it

Engage managed services for support and guidance on setting up and operating tax automation for your business. Many of our enterprise and premium solutions include or offer this option. [Avalara Certified Implementation Providers](#) are experienced at integrating Avalara solutions with ERP, ecommerce, point-of-sale, and billing systems commonly used by retailers. Avalara [tax experts](#) can help with audits, risk assessments, voluntary disclosure agreements, back taxes, and other complex requirements as retail operations grow or change.

Comprehensive compliance solutions

Avalara offers a variety of additional applications and integrations that extend the core functionality of our tax compliance solutions. Retailers can tailor compliance to their specific business needs, whether supporting ecommerce, brick-and-mortar, marketplace, or cross-border activity. Industry-specific solutions help align tax automation with the regulations and workflows most relevant to retail and other regulated industries.

Highest reliability and security standards

Avalara's 24/7 security operations center, application security protocols, and Security Incident Response Team (SIRT) provide around-the-clock support to protect the integrity of your data. Our platform and cloud services are continuously monitored and maintained by dedicated engineers. Avalara has documented SOC 2 compliance across key solutions, including Avalara AvaTax, Avalara Managed Returns, Avalara Managed Returns for Accountants, and Avalara Exemption Certificate Management in order to help reduce risk and support customer data protection.

AVALARA BY THE NUMBERS

Supported by
1,400+
signed partner
integrations



During Cyber Week 2025

Thanksgiving Day (11/27) to Cyber Monday (12/1)

AvaTax processed

1.14 B

API calls

AND

9,124

API calls per second
at its peak



6M+

returns

processed and filed in 2024

Avalara tax compliance solution matrix

Avalara solutions help retailers manage core tax compliance functions with speed, consistency, and control. Select products use Avi, Avalara's AI-powered assistant, to support key workflows and reduce manual effort.

Tax calculation

COMPLIANCE FUNCTION	PRODUCT	FEATURES
Sales tax	<u>Avalara AvaTax</u>	<ul style="list-style-type: none"> • Determine rates and rules for sales tax across jurisdictions • Calculate and apply near-real-time tax rates based on geolocation, item taxability, and jurisdictional rules • Apply marketplace facilitator rules to determine correct tax responsibility • Support consistent tax calculation across omnichannel transactions • Ensure accurate jurisdictional mapping and rate application at the point of transaction
Use tax	<u>Avalara AvaTax for Accounts Payable</u>	<ul style="list-style-type: none"> • Automate consumer use tax compliance within AP systems • Identify overcharged or undercharged tax using hybrid real-time and batch processing • Configure vendor rules and thresholds to identify high- and low-risk purchases • Auto-accrue use tax with annotations for credit tracking and refunds • Validate tax on purchases using internal rules and jurisdictional logic
VAT	<u>Avalara AvaTax</u>	<ul style="list-style-type: none"> • Calculate VAT for cross-border and domestic transactions • Apply regularly updated VAT rates and rules across countries and jurisdictions • Determine VAT based on transaction type, product taxability, and place of supply • Support complex VAT scenarios, including reverse charge, triangulation, and distance selling



<p>Cross-border duties and customs</p>	<p><u>Avalara Cross-Border</u></p>	<ul style="list-style-type: none"> • Calculate or estimate customs duties and import taxes in real time across 190+ countries • Apply duties and taxes to transaction invoices or checkout flows • Improve accuracy using regularly updated information • Support accurate classification and tariff code application for products
<p>Property tax</p>	<p><u>Avalara Property Tax</u></p>	<ul style="list-style-type: none"> • Centralize real and personal property tax data across all jurisdictions • Automate tax bill management, due date tracking, and return preparation • Apply current rates and jurisdiction-specific rules to calculate property tax obligations • Support audit readiness with built-in document management and reporting tools • Prepare and file returns for real property and tangible personal property
<p>Communications tax</p>	<p><u>Avalara AvaTax for Communications</u></p>	<ul style="list-style-type: none"> • Apply telecom-specific tax rules including USF, E911, TRS, and gross receipts taxes • Support complex billing scenarios with tiered, bundled, and tax-on-tax logic • Enable jurisdictionally accurate tax determination across federal, state, and local levels • Integrate with telecom billing and subscription platforms to ensure consistent tax calculation
<p>Occupancy and lodging tax</p>	<p><u>Avalara for Hospitality</u></p>	<ul style="list-style-type: none"> • Determine occupancy and lodging tax rates in real time by property location • Apply regularly updated jurisdictional rules and taxability criteria for short-term rentals and lodging services • Automate tax calculation across booking channels and property management systems • Prepare and manage lodging tax obligations for multiple locations in one platform • Support consistent compliance across municipalities, counties, and states



<p>Excise tax</p>	<p><u>Avalara AvaTax</u></p>	<ul style="list-style-type: none"> • Apply jurisdiction-specific excise rates and exemptions based on product, unit type, and transaction details • Support calculation for regulated goods such as fuel, tobacco, and alcohol • Automate accrual and reporting as part of the end-to-end compliance workflow
<p>Streamlined Sales Tax (SST)</p>	<p><u>Avalara Streamlined Sales Tax</u></p>	<ul style="list-style-type: none"> • Perform SST-compliant sales tax calculations across all participating states • Apply certified tax content and product taxability rules maintained by the SST Governing Board • Ensure accurate jurisdictional mapping and rate application at the point of transaction • Work in tandem with Avalara Managed Returns for simplified SST return filing and remittance

Tax returns and reporting

<p>Managed returns</p>	<p><u>Avalara Managed Returns</u></p>	<ul style="list-style-type: none"> • File returns, remit payments, and manage notices using a single solution • Access filing schedules and rules in one dashboard • File multi-location returns and remit once across jurisdictions • Automatically extract and sync sales data from multiple platforms • Support amended filings, reconciliations, and post-filing adjustments
<p>VAT reporting</p>	<p><u>Avalara VAT Reporting</u></p>	<ul style="list-style-type: none"> • Automate VAT returns preparation, filing, and remittance • File returns in local languages and formats • Track deadlines and threshold breaches • Support ongoing VAT compliance as cross-border operations expand



<p>Real-time invoice reporting</p>	<p><u>Avalara E-Invoicing and Live Reporting</u></p>	<ul style="list-style-type: none"> • Transmit transaction data to tax authorities in real time or near real time • Convert invoices into jurisdiction-specific digital formats as required by local mandates • Comply with global e-invoicing and live reporting regulations using a single API • Centralize invoice transmission across countries from one platform
<p>Streamlined Sales Tax (SST) returns</p>	<p><u>Avalara Managed Returns</u></p>	<ul style="list-style-type: none"> • Get preferred provider support for SST return filing • Automate preparation and filing of SST returns across participating states • Apply certified SST content for jurisdictional accuracy and rule alignment • Remit tax payments and manage SST notices through a single solution
<p>Returns management for accountants</p>	<p><u>Avalara Managed Returns for Accountants</u></p>	<ul style="list-style-type: none"> • Use centralized returns hub for accounting professionals managing client filings • Automate preparation of returns using client-supplied data and prebuilt templates • Track deadlines with auto-generated filing calendars per client and jurisdiction • Manage fixed asset data, depreciation schedules, and assessor form requirements • Support multi-client workflows with role-based access and reporting tools

Compliance documents

<p>E-invoicing</p>	<p><u>Avalara E-Invoicing and Live Reporting</u></p>	<ul style="list-style-type: none"> • Convert and transmit invoice data into country-specific e-invoice formats • Exchange invoice data via national and international networks • Use a single API to manage requirements across multiple countries
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<p>Exemption certificate management</p>	<p><u>Avalara Exemption Certificate Management</u></p>	<ul style="list-style-type: none"> • Digitize collection, validation, and storage of exemption certificates • Automate document validation, data capture, digitization, and renewals • Manage resale and exemption certificates across drop-shipping and multi-party transactions • Create and send exemption certificates to vendors
<p>1099 and W-9 filing</p>	<p><u>Avalara 1099 & W-9</u></p>	<ul style="list-style-type: none"> • Digitally collect W-9s and e-file 1099s • Support federal and state filings, corrections, and recipient delivery • Perform real-time TIN validation • Support compliance for vendor, influencer, and contractor payment reporting

Business operations and tax research

<p>Business registration and licensing</p>	<p><u>Avalara License Management</u></p>	<ul style="list-style-type: none"> • Centralize business licenses, permits, and tax registrations • Scale to manage thousands of licenses • Research licensing requirements at federal, state, and local levels
<p>Tax research</p>	<p><u>Avalara Tax Research</u></p>	<ul style="list-style-type: none"> • Access comprehensive, regularly updated tax research • Search tax information specific to company compliance needs • Validate tax decisions with access to expert tax researchers • Use AI-powered tools to quickly identify applicable rates, rules, and taxability decisions across jurisdictions



<p>Tax content</p>	<p><u>Avalara Tax Content</u></p>	<ul style="list-style-type: none"> • Perform tax calculations without an internet connection • Increase accuracy and consistency of tax calculations across locations • Use industry-specific sales and use tax templates • Keep up with ongoing tax rate and rule changes
<p>Nexus assessment and voluntary disclosure</p>	<p><u>Avalara AvaTax</u></p>	<ul style="list-style-type: none"> • Monitor economic nexus thresholds with real-time alerts • Visualize where you're approaching or exceeding nexus with dashboards • Automate sales tax registration across multiple jurisdictions • Resolve past liabilities with Avalara's Voluntary Disclosure Agreement (VDA) services • Receive support managing VDA submissions, penalty relief, and jurisdiction negotiations
<p>Item classification</p>	<p><u>Avalara Tariff Code Classification</u></p>	<ul style="list-style-type: none"> • Generate universal 6-digit or country-specific 10-digit tariff codes • Scale classification for product catalogs from dozens to millions of SKUs • Capture classification rationale to support audit review • Reduce customs delays caused by incorrect or incomplete classification
<p>Working capital lending services</p>	<p><u>Avalara Capital</u></p>	<ul style="list-style-type: none"> • Access flexible working capital directly from the Avalara platform • Apply, get approved, and manage funds without leaving your compliance workspace • Use capital to cover tax payments, government fees, and filing obligations • Avoid cash flow disruptions tied to compliance deadlines • Benefit from transparent, usage-based pricing with no idle charges or hidden fees



Take the next step with Avalara

If you have questions or would like additional information as you evaluate tax compliance solutions for your retail business, connect with an Avalara tax professional. You can also ask about curated solution bundles that can help simplify evaluation and map the right Avalara solutions to your requirements.

We can also provide the following to assist with RFPs and buying decisions:

- Product demonstrations
- Case studies and references
- Professional and managed services
- Support services details
- Security credentials
- Pricing and detailed cost breakdowns
- Implementation road map

Disclaimer:

Tax rates, rules and regulations change frequently. We hope you find this information helpful, however, this resource is for informational purposes only and does not provide legal or tax advice.

