

CREATING BUSINESS ENTITIES

In the Reporting tutorials, mention is made of Carriers, Sellers and Buyers. These are known as Business Entities.

In the system, certain widely known Business Entities are accessible to all reporters. These would include common carriers, other licensees or retail locations. At the licensee level it would include your specific customers that you may want to keep confidential. These may be retail customers, cardlock customers or bulk purchasers.

Select the Maintenance tab at the top of the screen and then select Business Entities.

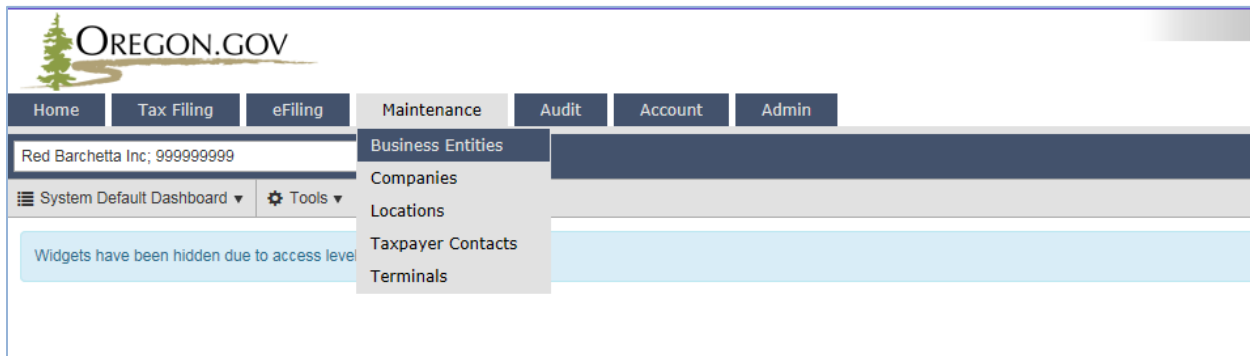
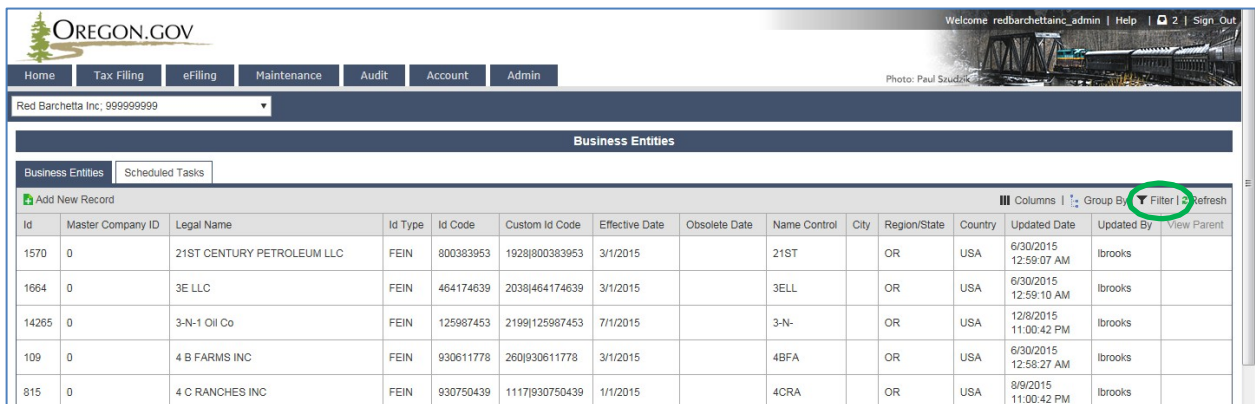


Figure 1. Maintenance dropdown list to select business entities

The following screen is displayed:



Id	Master Company ID	Legal Name	Id Type	Id Code	Custom Id Code	Effective Date	Obsolete Date	Name Control	City	Region/State	Country	Updated Date	Updated By	View Parent
1570	0	21ST CENTURY PETROLEUM LLC	FEIN	800383953	1928 800383953	3/1/2015		21ST		OR	USA	6/30/2015 12:59:07 AM	lbrooks	
1664	0	3E LLC	FEIN	464174639	2038 464174639	3/1/2015		3ELL		OR	USA	6/30/2015 12:59:10 AM	lbrooks	
14265	0	3-N-1 Oil Co	FEIN	125987453	2199 125987453	7/1/2015		3-N-		OR	USA	12/8/2015 11:00:42 PM	lbrooks	
109	0	4 B FARMS INC	FEIN	930611778	260 930611778	3/1/2015		4BFA		OR	USA	6/30/2015 12:58:27 AM	lbrooks	
815	0	4 C RANCHES INC	FEIN	930750439	1117 930750439	1/1/2015		4CRA		OR	USA	8/9/2015 11:00:42 PM	lbrooks	

Figure 2. List of existing business entities in system

As mentioned, widely known business entities are already in the system. These entities have a Master Company Id of zero.

Business entities entered by an individual reporter are given a unique Master Company Id that is only viewable to the reporter.

To filter the results for a particular Business Entity, click on the Filter icon at the top right of the list (in green circle above). The column headers will now contain input boxes.

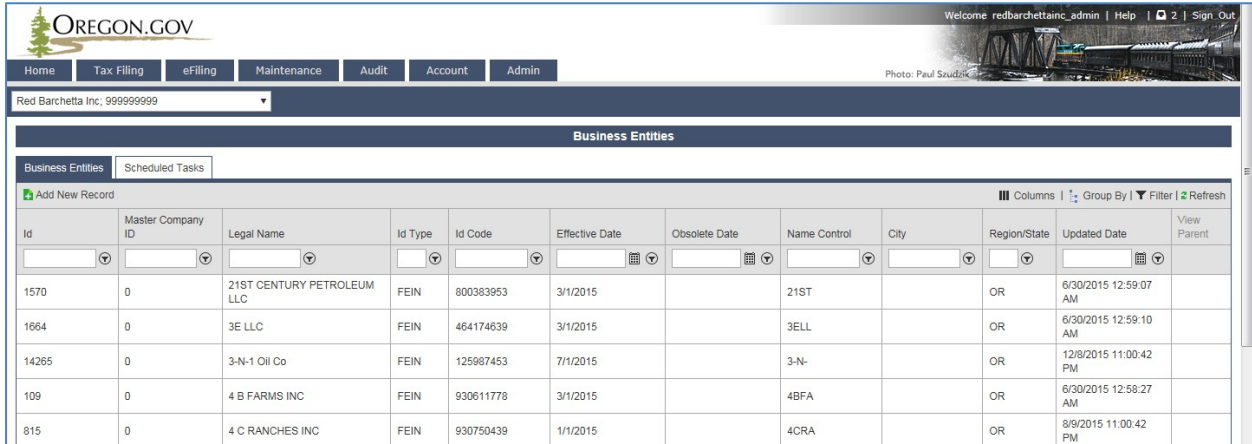


Figure 3. Business entities screen showing filter input fields

In the Legal Name input box, type all or part of the business name. Click the small, black funnel to the right of the box and from the box select “Contains”. All Business Entities that contain the text entered are displayed.

As mentioned, widely known entities are already in the system. These entities have a Master Company Id of zero. Business entities entered by an individual reporter are given a unique Master Company Id that is only viewable to the reporter.

If you cannot locate a business record by filtering the screen contents, you will need to create the record. Click the “Add New record” selection at the top left of the location list. An entry screen appears:

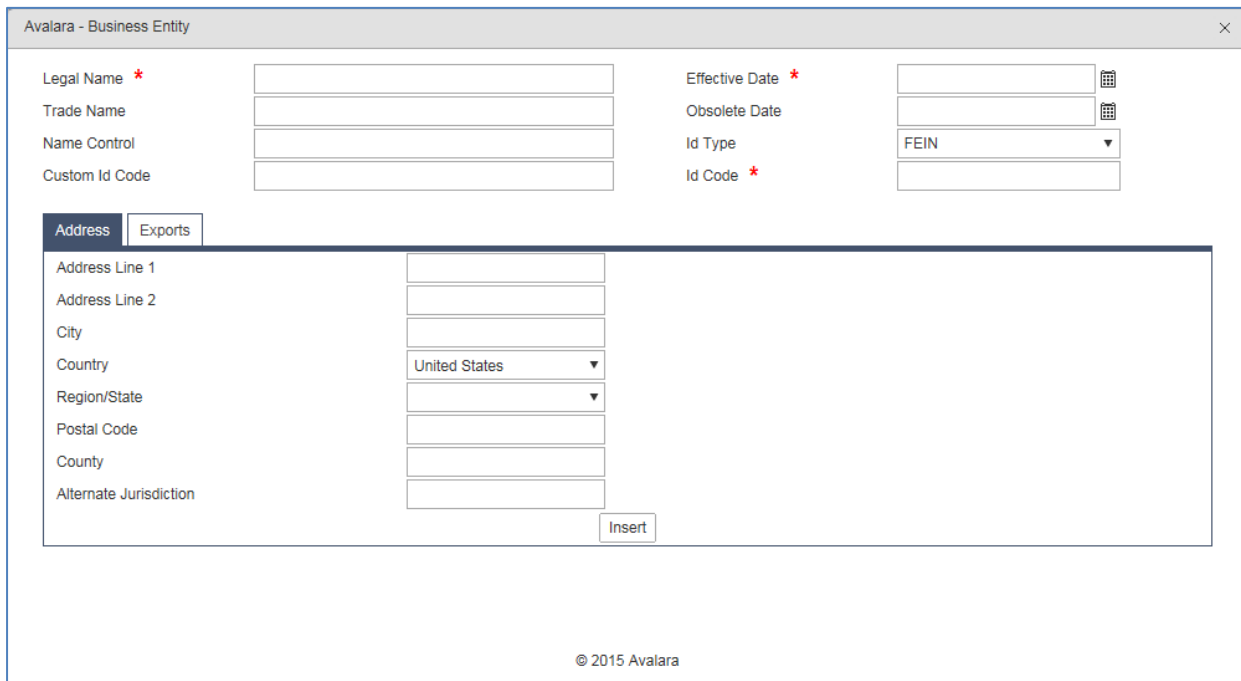


Figure 4. Add new business entity record screen

Enter the following mandatory fields:

Legal Name	Business name
Trade Name	DBA of business – if none exists, retype business name
Effective date	Must be prior to beginning of report period being entered
Id Type	Defaults to FEIN – change if necessary
Id Code	Tax Identification Number – if unavailable, leave Id Type as FEIN and enter 9 nines
Region/State	Select Oregon from drop-down box

Once entry is complete, click the “Insert” button at the bottom of the entry screen.

The system will then display a red message indicating the record was inserted or there was an error.

Once the record has successfully been inserted, the screen will also change to display new tabs:

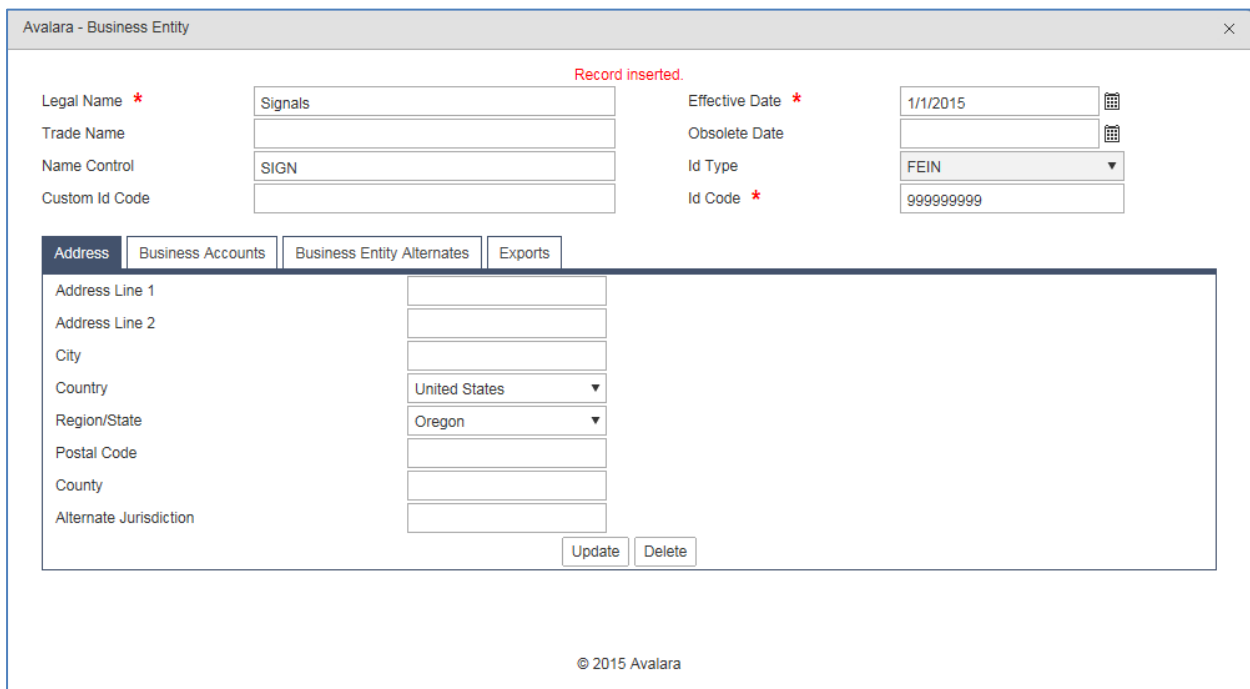


Figure 5. Business entity screen with new tabs.

Select the “Business Accounts” tab. The following screen is displayed:

Avalara - Business Entity

Record inserted.

Legal Name * Signals Effective Date * 1/1/2015
 Trade Name _____ Obsolete Date _____
 Name Control SIGN Id Type FEIN
 Custom Id Code _____ Id Code * 999999999

Address Business Accounts Business Entity Alternates Exports

+ Add New Record Filter Refresh

ID	Country	Jurisdiction	Business Type	Business Subtype	Custom Id Code	Effective Date	Obsolete Date	Locked Date	License Number	Change Ind
No records to display.										

Page: 1 of 1 Go Page Size: 5 Change Items 0 to 0 of 0.

Excel Export

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Figure 6. Business accounts tab detail.

Select “Add New Record” at the top left of the gray box. The screen changes again.

Complete the following fields:

- Jurisdiction Select Oregon from the drop-down list
- Business Type Defaults to Buyer – can also select Seller or Carrier from drop-down box

Click on the small check mark in the circle at the bottom left of the entry screen.

The screen will now appear as follows:

Avalara - Business Entity

Record inserted.

Legal Name * Effective Date *

Trade Name Obsolete Date

Name Control Id Type

Custom Id Code Id Code *

Address | **Business Accounts** | Business Entity Alternates | Exports

Filter | Refresh

ID	Country	Jurisdiction	Business Type	Business Subtype	Custom Id Code	Effective Date	Obsolete Date	Locked Date	License Number	Change Ind
<input type="button" value="edit"/> 16235	United States	*	Buyer	None		01/01/2015			999999999	M <input type="button" value="trash"/>

Page: 1 of 1 Go Page Size: 1 Change Items 1 to 1 of 1.

Excel

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Figure 7. Business Accounts Tab detail.

If the Business Entity entered requires more than one Business Type (Carrier, Buyer or Seller), select “Add New Record” again and enter the new information. Once completed, the newly created record will appear at the top of the Business Entities screen.

This entity record can now be found when manually entering a schedule that calls for a Carrier, Seller or Buyer. In the drop-down box, begin typing the name and the list will narrow down to the closest matching entries.

ADDING BUSINESS TYPES TO EXISTING BUSINESS ENTITY RECORDS

Find the applicable Business Entity record on the Business Entities screen by filtering or scrolling through items. Once located, click on the record and the entry screen will come up. Select the Business Accounts tab and enter the new Business Type record using the same procedure detailed above for new records.