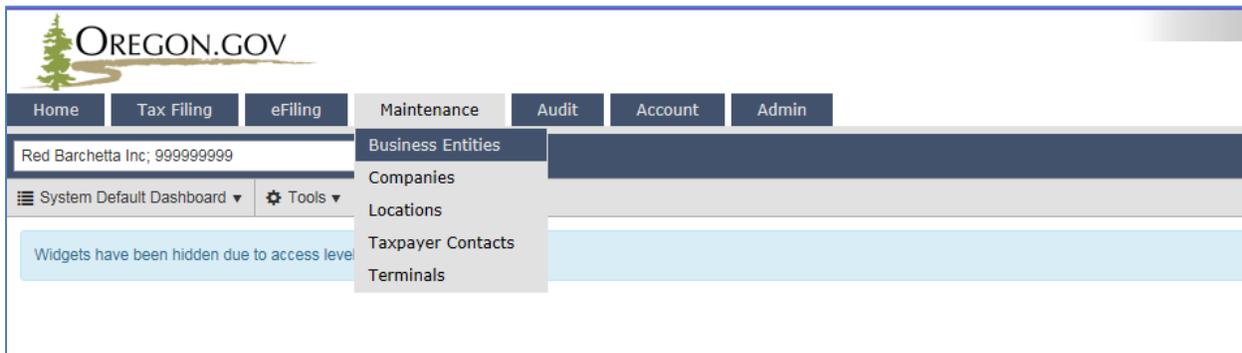


## CREATING BUSINESS ENTITIES

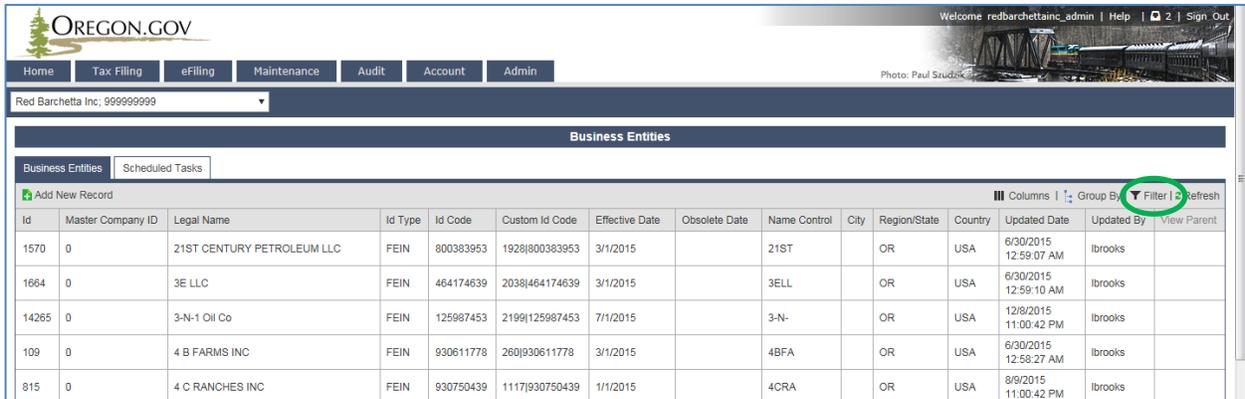
In the Reporting tutorials, mention is made of Carriers, Sellers and Buyers. These are known as Business Entities.

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.



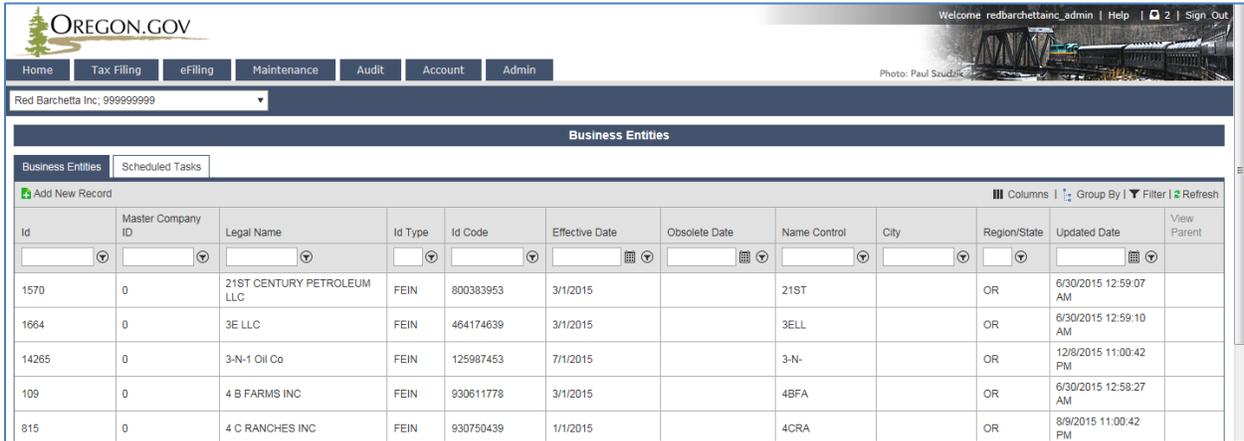
The following screen is displayed:



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.



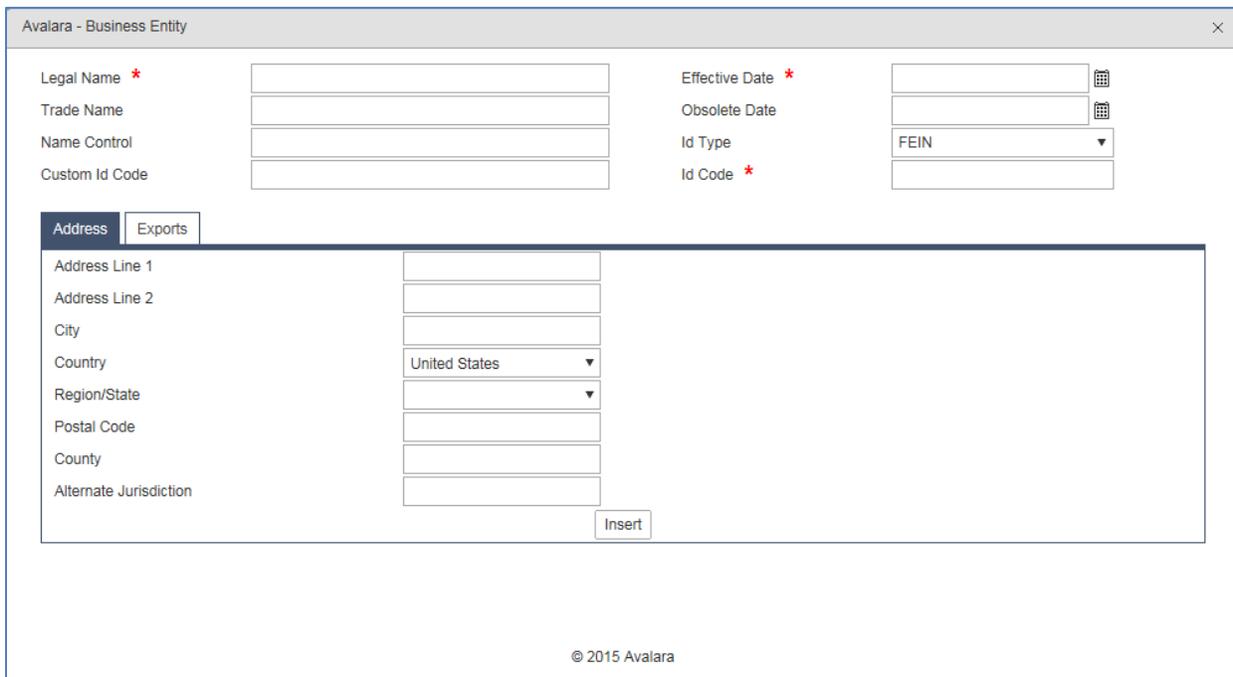
The screenshot shows the Oregon.gov website with the 'Business Entities' section active. The user is logged in as 'redbarchettainc\_admin'. The interface includes a navigation menu, a search bar for 'Red Barchetta Inc; 999999999', and a table of business entities.

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

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:



The screenshot shows the 'Avalara - Business Entity' entry form. It includes fields for Legal Name, Trade Name, Name Control, Custom Id Code, Effective Date, Obsolete Date, Id Type (set to FEIN), and Id Code. Below these is an address section with tabs for 'Address' and 'Exports'. The address section contains fields for Address Line 1, Address Line 2, City, Country (set to United States), Region/State, Postal Code, County, and Alternate Jurisdiction. An 'Insert' button is located at the bottom right of the address section.

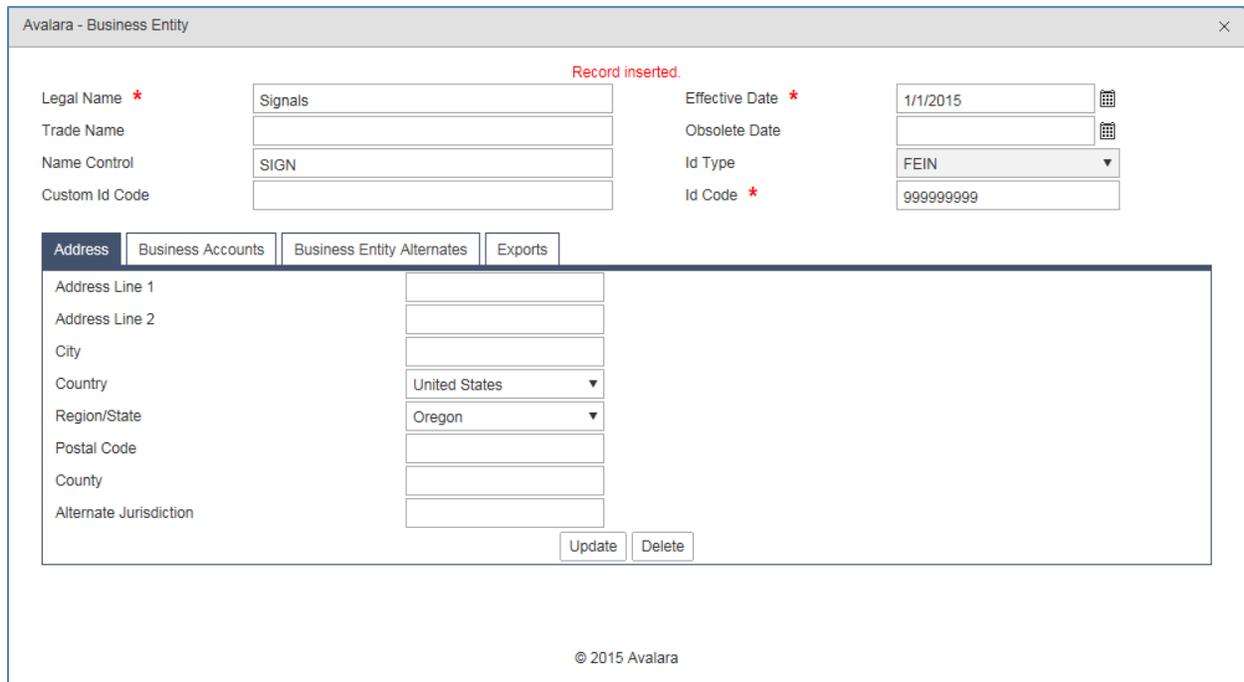
Enter the following mandatory fields:

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:



The screenshot shows a web application window titled "Avalara - Business Entity". At the top, a red message reads "Record inserted.". Below this, there are several input fields and dropdown menus:

- Legal Name \***: Signals
- Trade Name**: (empty)
- Name Control**: SIGN
- Custom Id Code**: (empty)
- Effective Date \***: 1/1/2015
- Obsolete Date**: (empty)
- Id Type**: FEIN
- Id Code \***: 999999999

Below these fields are four tabs: "Address", "Business Accounts", "Business Entity Alternates", and "Exports". The "Address" tab is selected, showing a form with the following fields:

- Address Line 1
- Address Line 2
- City
- Country: United States
- Region/State: Oregon
- Postal Code
- County
- Alternate Jurisdiction

At the bottom of the "Address" tab are "Update" and "Delete" buttons. The footer of the window reads "© 2015 Avalara".

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  
 Name Control SIGN Obsolete Date  
 Custom Id Code Id Type FEIN  
 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

© 2015 Avalara

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 \* 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
16235	United States	*	Buyer	None		01/01/2015			999999999	M

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

Excel Export

© 2015 Avalara

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.