

How We File Sales Tax: The Plan, For Your Sign-Off

For both brands (iHeartRaves + INTO THE AM). This is the direction we want to lock before any build work starts. Will, read it and confirm at the bottom.

Prepared for: Will **Date:** June 17, 2026 **Status:** For your alignment — answer at the bottom, captured live

TL;DR

- **The plan:** file our own numbers directly to the states, for free. No Avalara/TaxJar, no live Shopify API, no building our own filing software.
- **Two free channels:** (1) Streamlined Sales Tax (SST), one free registration covering up to 24 states, free filing where we qualify; (2) each state's own free bulk file-upload for everything else.
- **We deliberately do NOT want a tool that pulls live from Shopify.** The numbers have to be QC'd first (returns, refunds, test orders) before they are filed. Uploading our own QC'd file keeps that control. This is your API concern, and we agree with it.
- **How many SST states we actually get** depends on where Amazon stores our FBA inventory. One Amazon report tells us exactly. Even 5-10 states is a reliable, repeatable, free win.
- **No more work happens until you approve this.** Confirm the direction and send the two items we need (the Amazon report + our state list) in the form at the bottom.

1. The plan, in one paragraph

We file our own sales-tax numbers directly to each state, for free, and skip the vendors entirely. We keep computing and QC-ing the numbers ourselves, the way you already do, then submit them through two free channels: **SST** for the member states we qualify in, and each **state's own bulk file-upload** for the rest. No Avalara or TaxJar subscription, no live Shopify integration, and no in-house filing software to build.

WHAT THIS KEEPS

Your current workflow stays intact. You still own the numbers and QC them before anything is filed. We are just replacing the rotating free-trial uploads and the manual portal typing with official, free, repeatable channels.

2. Why we are NOT connecting an API to Shopify

This is the part to be crystal clear on, because it is exactly your concern and we fully agree with it. A TaxJar/Avalara-style API connection pulls order data live, directly out of Shopify, and files off those raw numbers. **We do not want that.** Our filing numbers are not the raw Shopify totals: returns, refunds, test orders, and other adjustments have to be reconciled out first. If a tool auto-pulls and files before that QC happens, we file wrong numbers.

THE DISTINCTION THAT MATTERS

"API connection" = a tool reaching into Shopify and using the numbers automatically. **"SST / bulk upload"** = WE prepare and QC the final numbers, then upload them ourselves. Same destination (the state), opposite control. We want the second one.

So dropping the API path is not a compromise we are settling for. It is the design we actually want, because it keeps human QC in the loop before a single number is filed.

3. SST: one free registration, up to 24 states

Streamlined Sales Tax (SST) is a multi-state agreement. One free registration (the SSTRS) lets us file a standardized return across the member states, and in the states where we qualify the filing itself is **free**, because the member states fund it. There is no vendor invoice for this.

The 24 SST states (23 full members + 1 associate)

Arkansas	Georgia	Indiana
Iowa	Kansas	Kentucky
Michigan	Minnesota	Nebraska
Nevada	New Jersey	N. Carolina
N. Dakota	Ohio	Oklahoma
Rhode Island	S. Dakota	Utah
Vermont	Washington	W. Virginia
Wisconsin	Wyoming	Tennessee*

*Tennessee is an associate member.

How many of these actually work for us

Not all 24. **FBA inventory in a state counts as physical presence there, which removes the free status.** The exact list is sitting in our own Amazon data: the **Inventory Event Detail report** shows every state our stock has been stored in. Subtract those states from the 24, and what is left is our free-SST list.

THE POINT

We will not get all 24, and that is fine. Even 5-10 states gives us a reliable, repeatable, free filing channel. We will know the real number the moment we see that Amazon report, so this is a precise calculation, not a guess.

4. Free state bulk-upload for everything else

For the states outside SST, including our biggest ones (California, New York, Texas, Florida, Illinois), each state's own tax portal lets any business **upload a return file for free**. No vendor needed. We prepare the file from our QC'd numbers and upload it, instead of typing every jurisdiction line by line.

The work here is one-time mapping: for each state, which file format it accepts and where the upload lives. Once mapped, it becomes a repeatable upload each filing period. **We will not start that mapping until you approve this direction.**

5. What we ruled out, and why

Two paths we looked at and are deliberately dropping:

PATH	WHY WE ARE DROPPING IT
Pay Avalara / TaxJar	Real money (~\$50-180k/yr at our scale, ballpark), and it brings the live Shopify API pull we specifically do not want (see Section 2).
Build our own direct API to each state	Each state requires passing certification testing: build software to their exact file spec, then pass their test gateway before going live. Weeks of developer work per state. Huge effort to replace what the free bulk-upload already does. Not worth it at our volume.

Both roads end at the same place the free channels already reach. So we are not spending money or engineering time to get there.

6. Your sign-off, Will

Before we do any more work, we need you aligned on this direction. **Type your answers below and hit Save. They are captured the moment you save, so there is no need to reply by email.**

Your name:

Will

1 Do you agree with this direction?

File our own QC'd numbers directly to the states, using free SST registration plus free state bulk-upload, with no Avalara/TaxJar and no live Shopify API. Yes / no, and anything you'd adjust.

Your answer...

Save

2 Does this resolve your API concern?

We never let a tool pull live from Shopify. We QC returns, refunds, and test orders out first, then upload the final numbers ourselves. Is that the control you wanted?

Your answer...

Save

3 Can you pull the Amazon "Inventory Event Detail" report?

It tells us exactly which SST states the FBA inventory removes, and therefore how many states we can file for free. This is the one input that decides the SST count.

Your answer...

Save

4 What is our list of states we currently file in, per brand?

iHeartRaves and INTO THE AM. Needed to build the bulk-upload map for the non-SST states.

Your answer...

Save

5 Anything you would change, add, or flag before we start?

Any risk, prior context, or step you want handled differently before we map states.

Your answer...

Save

Save all answers

Saves every answer you have filled in and shows you exactly what was captured.

THE ASK

We are not searching for the bulk-upload states or doing any build work until you approve. If you are aligned, answer above, especially the Amazon report and the state list, and we start mapping the states.

If you are not aligned, flag it in question 5 and we adjust before spending any time on it.

SST member-state list and the free-filing rules are from the Streamlined Sales Tax Governing Board (streamlinedsalestax.org). Vendor cost figures referenced in Section 5 are ballpark ranges from public pricing research, not quotes.

Level 3 — Interactive · Answers save the moment you hit Save · Generated by Claude

