

Sales Tax Nexus Worksheet

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Use this worksheet to determine where your business has sales tax nexus, track your sales by state, and manage filing schedules.

Part 1: Physical Nexus Assessment

Check any that apply for each state where you have a physical presence:

State	Office / Store	Warehouse	Employees	Inventory (incl. FBA)	Trade Shows	Other Property	Physical Nexus?
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Yes <input type="checkbox"/> No
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Yes <input type="checkbox"/> No
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Yes <input type="checkbox"/> No
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Yes <input type="checkbox"/> No
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Yes <input type="checkbox"/> No

Notes: Amazon FBA inventory creates physical nexus in every state where Amazon stores your products. Check your FBA inventory placement report.

Part 2: Economic Nexus Tracker

Track your sales by state to determine where you've crossed economic nexus thresholds. Update quarterly.

Common Thresholds by State

State	Sales Threshold	Transaction Threshold	Which Triggers Nexus?
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Alabama	\$250,000	N/A	Sales only
Arizona	\$100,000	N/A	Sales only
California	\$500,000	N/A	Sales only
Colorado	\$100,000	N/A	Sales only
Connecticut	\$100,000	200	Either
Florida	\$100,000	N/A	Sales only
Georgia	\$100,000	200	Either
Illinois	\$100,000	200	Either
Indiana	\$100,000	N/A	Sales only
Massachusetts	\$100,000	N/A	Sales only
Michigan	\$100,000	200	Either
Minnesota	\$100,000	200	Either
New Jersey	\$100,000	200	Either
New York	\$500,000	100	Both required
North Carolina	\$100,000	200	Either
Ohio	\$100,000	200	Either
Pennsylvania	\$100,000	N/A	Sales only
Tennessee	\$100,000	N/A	Sales only
Texas	\$500,000	N/A	Sales only
Virginia	\$100,000	200	Either
Washington	\$100,000	N/A	Sales only
Wisconsin	\$100,000	N/A	Sales only

This is a partial list. Check your specific states at each state's Department of Revenue website.

Your Sales by State Tracker

State	Q1 Sales	Q1 Transactions	Q2 Sales	Q2 Trans.	Q3 Sales	Q3 Trans.	Q4 Sales	Q4 Trans.	YTD Sales	YTD Trans.	Threshold Crossed?
	\$		\$		\$		\$		\$		<input type="checkbox"/>
	\$		\$		\$		\$		\$		<input type="checkbox"/>
	\$		\$		\$		\$		\$		<input type="checkbox"/>
	\$		\$		\$		\$		\$		<input type="checkbox"/>
	\$		\$		\$		\$		\$		<input type="checkbox"/>

	\$		\$		\$		\$		\$		<input type="checkbox"/>
	\$		\$		\$		\$		\$		<input type="checkbox"/>
	\$		\$		\$		\$		\$		<input type="checkbox"/>
	\$		\$		\$		\$		\$		<input type="checkbox"/>
	\$		\$		\$		\$		\$		<input type="checkbox"/>

Part 3: Registration Tracker

Track your sales tax permit status in each nexus state:

State	Nexus Type	Permit Number	Registration Date	Filing Frequency	Filing Due Dates	Portal URL
	<input type="checkbox"/> Physical <input type="checkbox"/> Economic			<input type="checkbox"/> Monthly <input type="checkbox"/> Quarterly <input type="checkbox"/> Annually		
	<input type="checkbox"/> Physical <input type="checkbox"/> Economic			<input type="checkbox"/> Monthly <input type="checkbox"/> Quarterly <input type="checkbox"/> Annually		
	<input type="checkbox"/> Physical <input type="checkbox"/> Economic			<input type="checkbox"/> Monthly <input type="checkbox"/> Quarterly <input type="checkbox"/> Annually		
	<input type="checkbox"/> Physical <input type="checkbox"/> Economic			<input type="checkbox"/> Monthly <input type="checkbox"/> Quarterly <input type="checkbox"/> Annually		
	<input type="checkbox"/> Physical <input type="checkbox"/> Economic			<input type="checkbox"/> Monthly <input type="checkbox"/> Quarterly <input type="checkbox"/> Annually		

Part 4: Filing Schedule

Monthly Filers

State	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Quarterly Filers

State	Q1 (Apr 30)	Q2 (Jul 31)	Q3 (Oct 31)	Q4 (Jan 31)
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Annual Filers

State	Annual Due Date	Filed?
		<input type="checkbox"/>
		<input type="checkbox"/>

Part 5: Exemption Certificate Log

Track exemption certificates received from buyers:

Customer Name	State	Certificate Type	Certificate #	Date Received	Expiration	On File?
		<input type="checkbox"/> Resale <input type="checkbox"/> Exempt Org <input type="checkbox"/> Other				<input type="checkbox"/>
		<input type="checkbox"/> Resale <input type="checkbox"/> Exempt Org <input type="checkbox"/> Other				<input type="checkbox"/>
		<input type="checkbox"/> Resale <input type="checkbox"/> Exempt Org <input type="checkbox"/> Other				<input type="checkbox"/>
		<input type="checkbox"/> Resale <input type="checkbox"/> Exempt Org <input type="checkbox"/> Other				<input type="checkbox"/>

Reminder: Keep exemption certificates on file for at least 4 years (some states require longer). If audited, you need the certificate to prove the exemption was valid.

Quick Action Items

- Complete physical nexus assessment (Part 1)
- Pull sales-by-state report from your e-commerce platform or accounting software
- Fill in economic nexus tracker (Part 2) — identify states where you've crossed thresholds
- Register for permits in all nexus states (Part 3)
- Set up filing calendar with reminders (Part 4)
- Collect and file exemption certificates (Part 5)
- Evaluate automation tools if you have nexus in 3+ states (TaxJar, Avalara)
- Review quarterly — new states may trigger as sales grow

For the full guide, read: [Sales Tax for Small Business](#)

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