Avalara
CertCapture

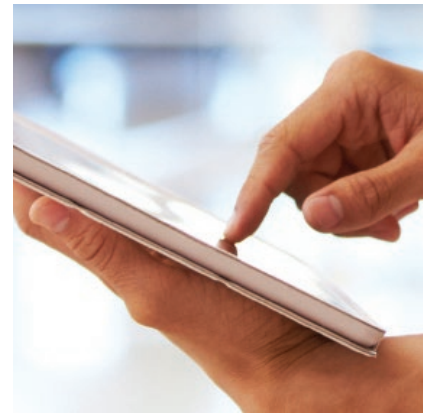## Sales tax exemption certificate management made easy

Avalara CertCapture is an automated, cloud-based solution that empowers organizations to streamline and simplify the sales tax exemption certificate management process. It relieves companies of the manual tasks associated with soliciting, collecting, verifying, storing and tracking exemption certificates and offers a comprehensive process for achieving compliance and remaining audit-ready. With scalable pricing and hundreds of integrations, Avalara CertCapture is an essential tool for any growing organization.

The Challenge

Poor and disorganized exemption certificate management processes are among the leading causes of sales and use tax audit exposure. Manual, error-prone systems for collecting and storing hard copy certificates in filing cabinets and off-site storage makes it difficult to produce and verify exemption certificates on demand, increasing audit liability. Furthermore, when customers are not able to conveniently submit exemption certificates at the point of sale your company faces additional customer service and loyalty issues.
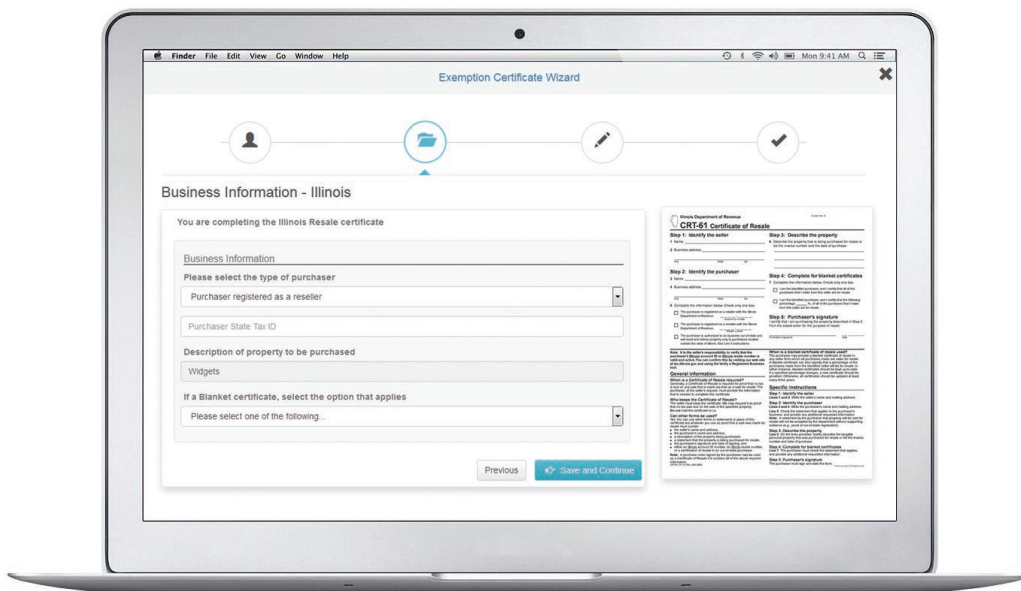
The Solution

Avalara CertCapture automates the entire process, digitally capturing and storing exemption certificates in a central repository where tax managers can easily pull reports, monitor expirations and manage certificates to reduce audit risks and proactively maintain compliance. Hundreds of third-party integrations allow you to incorporate certificate management into your existing ERP, CRM, POS, tax decision and other software. CertCapture can be used to create cover letters and pre-filled certificates for customers to complete in a secure web portal or mobile app. Expiration dates are tracked automatically and renewal requests are sent before certificates expire.

ONE SOLUTION. MANY BENEFITS.

✓ Assign access for users at varying levels of permission

✓ Solution training and access to extensive resource materials is included

✓ No hardware to buy or maintain

✓ No ongoing IT support needed

✓ Integrate with virtually any ERP, CRM, tax decision software and more

✓ Collect and validate exemption certificates with a smartphone or tablet with the new **CertCapture Mobile Scan App**

> Krispy Kreme Doughnuts, Inc. decreased their audit liability by over 90% using CertCapture.

Vida Reese
Tax Analyst, Krispy Kreme Doughnuts, Inc.

TechValidate

Integrate with tools you already use

Hundreds of third-party integrations allow you to incorporate exemption certificate management right into your current workflows. From CRMs and ERPs to accounting software and in-house solutions, Avalara CertCapture can keep current with changes to customer accounts and ensure other applications receive the latest taxability status updates.

Priced to scale with your business

Avalara CertCapture scales with you as your business grows. You'll only be charged by the number of certificates stored.

Full-service options

Avalara's Managed Services team is ready to handle your document management processes to help minimize your audit exposure from missing, invalid and expired forms. Outsourcing to Avalara Managed Services enables you to focus on your core business, leading to increased efficiencies, cost savings, compliance and reduced audit risk.

CertCapture Mobile Scan App
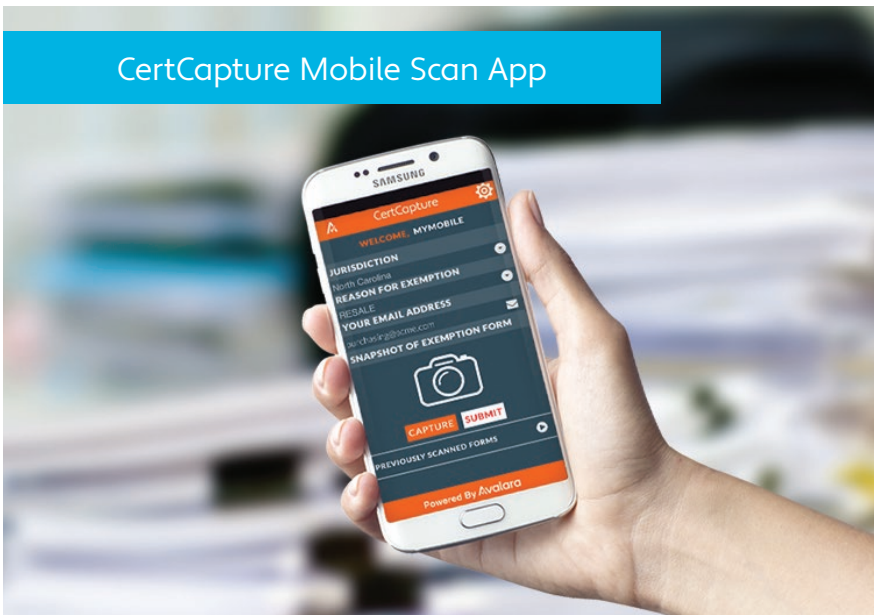
ADVANCED FEATURES THAT SCALE WITH YOUR BUSINESS

✓ Full library of current state certificates

✓ Schedule personalized requests for new certificates sent via email, fax or mail

✓ Direct links to state websites for quick ID number checks

✓ Secure, easy-access web portals for customers and auditors

✓ Expiration date tracking and automated renewal requests

INTEGRATIONS

CertCapture:

✓ Populates with data fed directly from your ERP

✓ Maps current certificates to customer records

✓ Updates tax statuses in your tax software and CRM

✓ Integrates with online and in-store systems with specific modules for Retail and eCommerce

More than 2,000 customers trust Avalara CertCapture to securely manage 17,000,000 compliance documents.

About Avalara Compliance Document Management

Avalara Compliance Document Management helps organizations achieve compliance with automated solutions that are fast, accurate and easy to use. We have solutions specifically to manage sales tax exemption certificates, federal withholding documents (Forms W-8 and W-9) and excise business licenses.

Avalara CertCapture

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