



Managed Services for Exemption Certificates

Presented by Matthew MacNeil

Manager of Tax Technology Services

Today's webinar is lead by....



Matthew MacNeil

Matt is one of the founding members of the CertCapture team and has been working with sales tax exemption certificate collection, storage and validation since 1998. Dinner conversations at home or on the road seem to be eternally focused on the collection of those pesky forms.



Agenda – all meetings need a roadmap

Today, we will showcase managed service offerings from Avalara as they relate to sales tax exemption certificates.

We will cover in this session:

- A general overview of the service offerings available.
- The difference between levels of managed services.
- The benefits offered in the full service or partial service approach with exemption certificates.
- Items to be aware of that might affect your exemption certificate service levels.



CertCapture Managed Services

Avalara offers a variety of services to assist you in the acquisition of sales tax exemption certificates.

- Data entry services
- Certificate solicitations thru mail or email
- Phone support
- Professional services



Data Entry



Data Entry

Avalara Data Entry Services is the receipt of your sales tax forms and then scanning, uploading, mapping them to customer records, entering certificate details and making sure they meet state regulations.

Benefits include:

- Working with a trained team of sales tax professionals
 - We have dedicated employees who only do data entry.
 - They take part in regular training classes to keep them up to speed on sales tax exemption certificates regulations and forms
- We enter all the forms, map them to customers and determine if they meet state standards for audit purposes
 - An average 1000+ forms can be entered per day to get your project up to speed very quickly



Mailings



Mailings

- Mailing/Emailing Services
 - We contact your customers by your preferred method. Some customers are naturally better to contact by mail, others by email. You decide what works best.
 - We assist you to develop customized contact letters/emails. We provide samples as a starting point and you customize them to your needs.
 - We provide pre-populated exemption certificates in the mailings. We identify the states in which certificates are needed and include blank forms or samples of licenses to direct the customer to complete the form properly.
 - We provide access to the web portal/wizard to complete forms
 - We utilize USPS first class mail. This provides quicker action on the part of the government and also provides us feedback on which addresses are no longer valid.



Mailings

USPS First Class Mail

- First Class Mail provides quicker action on the part of the government and also provides us feedback on which addresses are no longer valid.

What happens when your outbound letters as undeliverable?

- Our team enters all those notices into CertCapture.
- Once in CertCapture reports can be generated that show what customers may be potentially out of business.
- Future mailings are blocked to these “undeliverable” accounts.



Generating Mass Mailings: More than a mouse click

- YES, if you're emailing customers a mass mailing campaign is just a few clicks away.
- If you're sending hard copy letters, remember that there are additional steps:
 - Printing
 - Stuffing envelopes
 - Sealing the envelopes
 - Writing or attaching labels
 - Stamping
 - Delivering to the post office



Phone Services

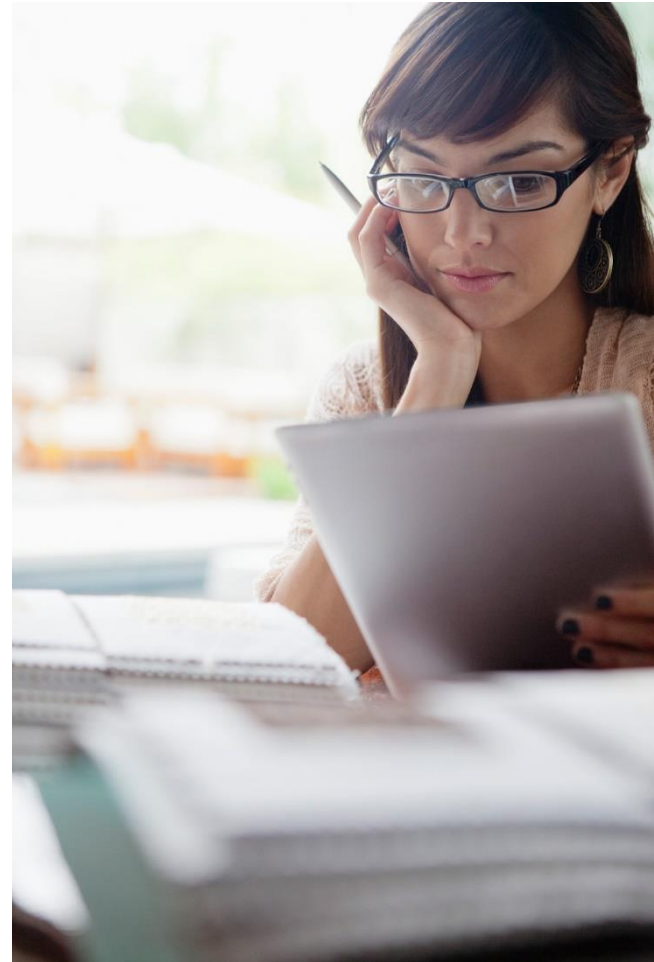


Phone Services

- Phone support
 - We provide phone support for your mailing campaigns. An additional feature of Mailing Services, we include inbound phone support for customers that may have questions on how to complete the form.
 - We provide outbound call services to solicit certificates. There are always times where the only way to acquire a certificate is to pick up the phone and call them.



Avalara Professional Services



Avalara Professional Services

In addition to the regular service offerings that are included with the software, the Avalara Professional Services team can also assist you with other areas of exemption certificate management.

- Audit support
 - We deal directly with the state auditors.
 - We provide consulting on audits that did not go the way you had hoped and work with the state to clarify what needs to be altered for better results in the future.
- Nexus Studies
- Product Taxability Research



Managed Service Levels

Self Service

Project Services

Full Service



Self Service Customers

These customers have full access to the software to perform the work at their time of choosing. They are responsible for all mailings, data entry and reporting.

Limitations on the account are:

- Must utilize the standard support hotline to ask questions.
- Limited customization allowed.



Project-Based Managed Services

A self-service customer requests Avalara to provide managed services for a specific time period or project.

These projects can include:

- Initial start up and entering of historical certificates
- Initial start up and collection of all certificates from customers
- Catch up projects to enter certificates already collected
- Daily data entry coverage for vacations or periods of time when you're short staffed



Full Service

With our full service offering, we take care of all the data entry and mailings, and you also receive:

- A specific point of contact within the data entry team as your first person to assist you with your account.
- Customized report management that accommodates your specific needs.
- Customization of fields within the system, such as invalid reason and exemption reasons, when needed.



Benefits of Managed Services

- Data entry is done by our trained staff that specializes in sales tax exemption certificate management.
- Standard review periods – you are not stuck waiting for that “free time next week” that never comes for you to catch up on the data entry.
- Timely turn around on outbound letters to new customers. Normally you have 90 days to collect that certificate, so as soon as they sign up the clock is ticking.



What is in the ROI?

- Reduced risk
 - Our team of trained experts is working for you.
- Reduced payroll/headcount
 - Short term or long term projects, our dedicated team members can handle you needs.
- Workflow optimization
 - Our team does the work as it arrives and updates your invoicing system so you can keep your sales people and customers happy. Certificates don't pile up waiting to be put into the system.



More thoughts on Workflow



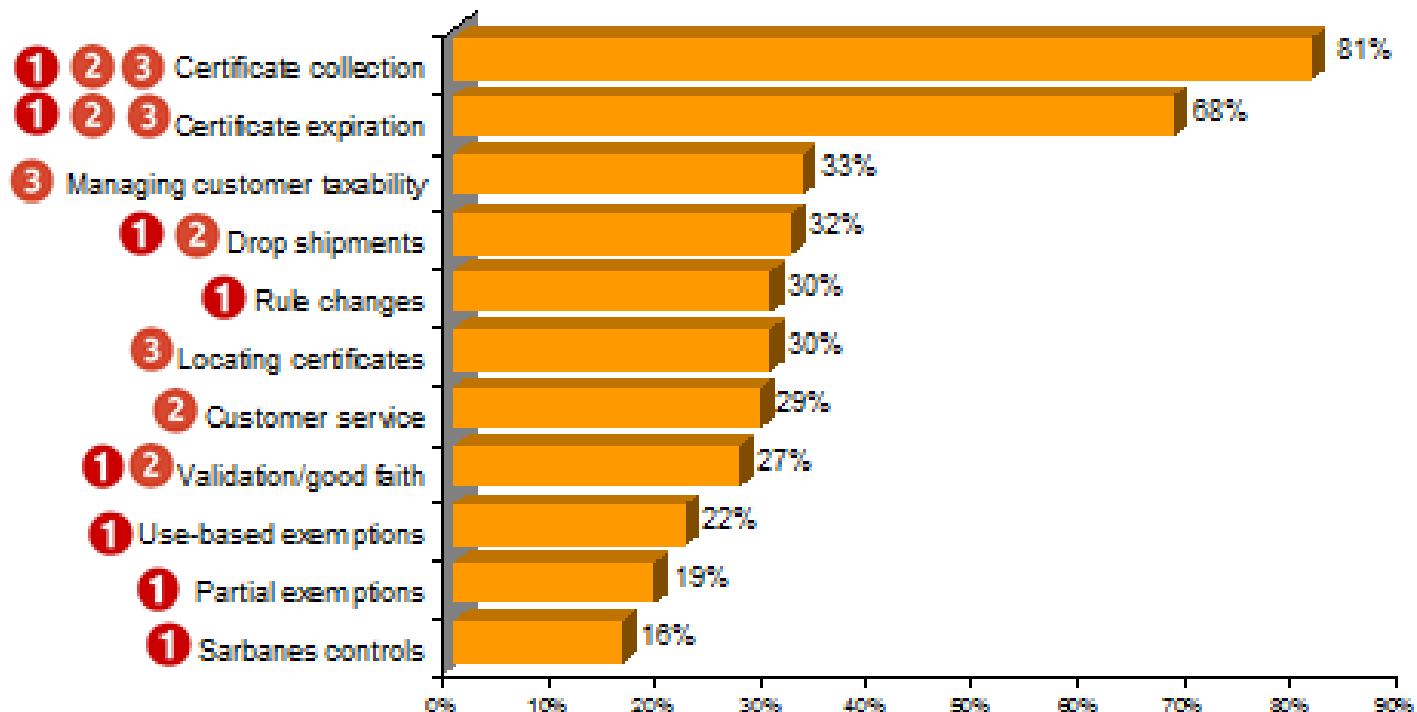
More thoughts on Workflow

- Slow the set up of new customers
 - Is your team waiting to collect “all the pieces” before they create that new account?
- Put an order on hold
 - Sometimes the unknown of customer exempt status can delay the order from being processed
- Delay bill payment
 - Incorrectly taxed invoices can cause your customers to ask for a new, accurate bill or end up in a short pay situation.



The hardest part of Certificate Management

What areas do you feel are the key challenges to managing exemption certificates?



You may need additional services if you have...

- Change in corporate name or federal ID number
- Change in Nexus
- Acquisition of another company, integration of that data into existing data
- Audit response, research and company contacting



If You Need Additional Services...

The starting point is to contact your Customer Account Manager. Your CAM can discuss your current services levels, suggest options and accommodate any additional needs you may have.

Your CAM's contact information is located in the bottom right corner on your Avalara Admin Console.

Additional information is available at www.CertCapture.com and www.Avalara.com



Questions?

Thank you for attending!

Matt MacNeil

