Avalara

Leave your tax compliance documentation to the experts

Every year, state auditors collect millions of dollars in tax liabilities from companies due to missing, invalid and expired compliance documentation. With a deep knowledge of state rules and requirements on everything from sales tax exemption certificates to federal withholding forms to excise business licenses, Avalara's Managed Services team know how to keep companies audit-ready.

While you focus on your core business, our trained exemption experts manage compliance through a four-step process:

Acquire

As compliance documentation is submitted, the Managed Services team enters required data directly into CertCapture, ExciseCapture or VendorCapture for you. It is automatically stored and indexed in a secure database you can access at any time

Validate

While loading data and documents, our compliance professionals ensure all certificates, licenses and forms are complete and valid. Because these specialists are trained in identifying missing or incorrect information, you can rest assured that any invalid documents will be identified for follow-up.

Manage

Using a combination of email, print and fax to meet different communication preferences, campaigns are developed to collect up-to-date information for expired and invalid documents. This part of the process is guided by proven best practices to speed up response time and reduce audit exposure.

Report and Analyze

An intuitive dashboard and reporting engine makes it easy to quickly locate and analyze customer and document information. You can view and update information online, or export it for deeper analysis and integration with third party tools.

FOR USE WITH:

Avalara CertCapture
Thoroughly and accurately manage sales tax exemption certificates

Avalara VendorCapture
Collect and validate Forms W-8 and W-9 to be FATCA-compliant

Avalara ExciseCapture
Collect correct excise business licenses and exemption certificates

Focus on your core business. We'll manage the compliance documentation.

Avalara's Managed Services enables your team to work more efficiently and profitably while remaining compliant and reducing audit exposure.

Based on recent survey results, most companies would need to hire and train at least one full-time employee to achieve the same level of work accomplished by our specialized compliance document experts:

> 71% of surveyed Fortune 500 and Global 500 customers achieve a FTE workload of 1.5 people or more.

Survey of users of Avalara CertCapture Managed Services

TechValidate

> " CertCapture is much easier and more effective than trying to maintain the certificates in house. "

Mark Coil
Accounts Receivable Manager, Nidec Motor Corporation

TechValidate

OUTSOURCE EVRYTHING

✓ Creation of actionable customer communications

✓ Certificate and form validations

✓ Customer and document data entry

✓ Scan or upload paper PDFs

✓ Expiration date tracking

✓ Regular reporting

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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