

Avalara Exemption Certificate Management Essentials

Automate certificate collection and retrieval

The Problem/Solution

It's one thing to exempt a customer from paying sales tax and quite another to collect and produce the certificate that proves the exemption's validity to an auditor.

Manually collecting and validating certificates can be a major hassle and time-sink for your sales team. Even if you are getting all the certificates you need, you're still at risk if you can't store and retrieve them easily for an audit. And if you don't notice that a certificate has expired, it's more audit risk.

Avalara Exemption Certificate Management (ECM) Essentials fully automates collection, storage, and retrieval of exemption certificate data and images while connected to the AvaTax calculation engine, verifying current, active information is on file at the time of sale. It reduces work for your team, simplifies the creation of certificates for your customers, and helps you maintain audit readiness.

AvaTax integration

ECM Essentials is tightly integrated with AvaTax to ensure that you provide an exemption only when you have the certificate.



Reduce time spent collecting certificates



Simplify certificate creation for your customer



Minimize audit risk

Certificate collection

Send customers an email with a link that will guide them to select the right form and help them fill it out on-line and return it directly to you. Alternatively, they can upload an existing form.

By making sure the right fields on the right form are completed, you gain confidence in certificate validity and your customer minimizes completion time while avoiding potential order delays required to fix invalid certificates.

Expiration tracking

Track certificate expiration dates and generate reports that show when they are due to expire. Easily create requests to remind customers and collect new ones in time to avoid sales delays.

Manage, view, and report on all your certificates from a central location.

Learn more at [Avalara.com](https://avalara.com). Contact us for a demo and consultation.