

Understanding exemption certificate management



Disclaimer

While we hope you'll find this discussion helpful, this session is for informational purposes only and is not legal or tax advice.



Avalara

Safe harbor statement

This information is Avalara's confidential information. Materials are solely for use in this context and are not approved for further distribution. This document describes Avalara's intentions as of the date of drafting and may include descriptions of product functionality or technology that are not currently available. Avalara reserves the right to change the functionality, release dates, technology, initiatives, and plans described herein without notice or duty to update.

Continuing Professional Education (CPE)



Qualifying for credit

- Respond to 3 of 4 poll questions
 - Questions display for a limited amount of time
 - Select your answer and click submit
- Attend the full duration of the webinar
 - Attend at least 50-minutes to qualify



Downloading Certificate

- Download the certificate once you qualify
 - Find the Earn Certification box
 - Click the icon to download
- Those that qualify will also receive their certificate in a post-event email

Meet your presenter



Jeffrey Lutters

Sr. Manager,
Product Solution Engineering

Avalara

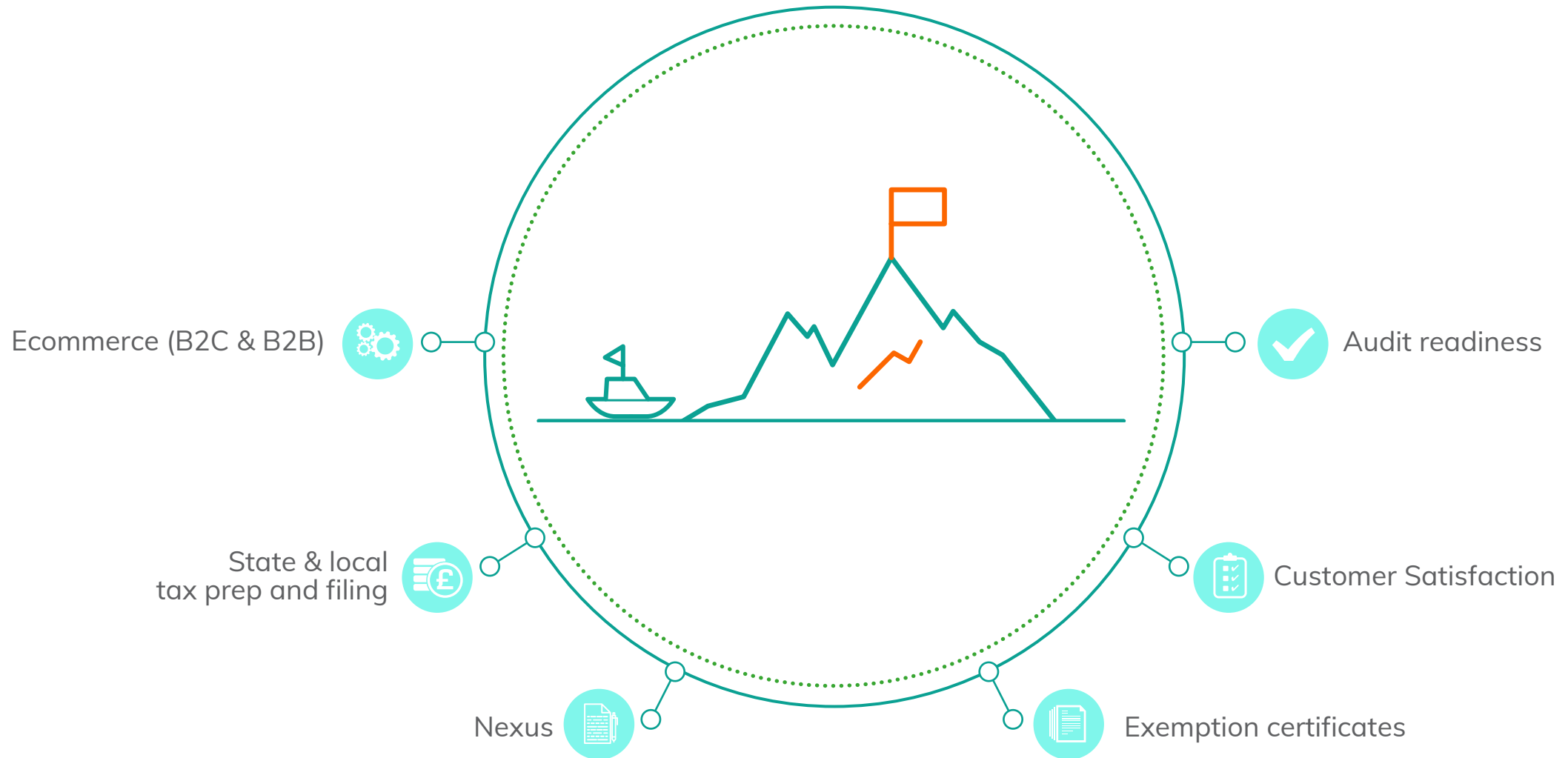
Jeffrey leads a team of Product Solution Engineers in direct support of 30,000+ Avalara customers. His team acts as both technical and tax subject matter experts as their customers look to deploy new technologies, move into new markets, sell around the world, or restructure how they look at tax compliance.

Personally, he focuses on global compliance, retail and ecommerce intricacies, new technology deployments, document management, and business processes for large multi-national customers.

Agenda

- 1 > What is exemption management?
- 2 > Why is exemption management so difficult to manage?
- 3 > Exemption Management & the SST Program
- 4 > What is Avalara Exemption Certificate Management?
- 5 > How does it work with AvaTax?
- 6 > Benefits of ECM
- 7 > Demo
- 8 > Q&A

Tax calculation is just the **tip of the iceberg...**



What is exemption
management?

Understanding exemption certificates

An exemption certificate is the form presented by an exempt organization or individual to the seller when making a tax-exempt purchase.

Exemptions are based on the customer making the purchase and always require documentation.

UNIFORM SALES & USE TAX EXEMPTION/RESALE CERTIFICATE — MULTIJURISDICTION

The below-listed states have indicated that this certificate is acceptable as a resale/exemption certificate for sales and use tax, subject to the notes on pages 2-4. The issuer and the recipient have the responsibility to determine the proper use of this certificate under applicable laws in each state, as these may change from time to time.

Issued to Seller: _____

Address: _____

I certify that:

Name of Firm (Buyer): _____

Address: _____

and is registered with the below-listed states and cities within which your firm wholesale, resale, or ingredients or component of a new product or service is in the business of wholesaling, retailing, manufacturing, leasing (renting) selling

Description of Business: _____

General description of tangible property or taxable services to be purchased from

State	State Registration, Seller's Permit, or ID Number of Purchaser	State
AL ¹		MI
AR		NE
AZ ²		NV
CA ³		ND
CO ⁴		OR
CT		PA
DC ⁵		RI
FL ⁶		SC
GA ⁷		SD
HI ⁸		TN
ID		TX
IL ^{9,10}		UT
IA		VA
KS		WV
KY ¹¹		WY
ME ¹²		
MD ¹³		
MI ¹⁴		
MN ¹⁵		

I further certify that if any property or service so purchased tax free is used or tax due directly to the proper taxing authority when state law so provides or in each order that we may hereafter give to you, unless otherwise specified, and state.

Under penalties of perjury, I swear or affirm that the information on this form

Authorized Signature: _____ (Owner)

Title: _____

Date: _____

Revised 1/29/2015

Customer # _____

Streamlined Sales and Use Tax Agreement

Certificate of Exemption

This is a multi-state form. Not all states allow all exemptions listed on this form. Purchasers are responsible for knowing if they qualify to claim exemption from tax in the state that would otherwise be due tax on this sale. The seller may be required to provide this exemption certificate (or the data elements required on the form) to a state that would otherwise be due tax on this sale.

The purchaser will be held liable for any tax and interest, and possibly civil and criminal penalties imposed by the member state, if the purchaser is not eligible to claim this exemption. A seller may not accept a certificate of exemption for an entry-based exemption on a sale made at a location operated by the seller within the designated state if the state does not allow such an entry-based exemption.

1. ☐ Check if you are attaching the Multi-state Supplemental form.
☐ If not, enter the two-letter postal abbreviation for the state under whose laws you are claiming exemption.

2. ☐ Check if this certificate is for a single purchase and enter the related invoice/purchase order # _____

3. Please print

Name of purchaser _____

Business Address _____ City _____ State _____ Zip Code _____

Purchaser's Tax ID Number _____ State of Issue _____ Country of Issue _____

If no Tax ID Number FEIN _____ Driver's License Number/State Issued ID Number _____ Foreign diplomat number _____

Enter one of the following: _____ State of Issue _____ Number _____

Name of seller from whom you are purchasing, leasing or renting _____

Seller's address _____ City _____ State _____ Zip code _____

4. Type of business. Circle the number that describes your business

- | | |
|--|--|
| 01 <input type="checkbox"/> Accommodation and food services | 11 <input type="checkbox"/> Transportation and warehousing |
| 02 <input type="checkbox"/> Agricultural, forestry, fishing, hunting | 12 <input type="checkbox"/> Utilities |
| 03 <input type="checkbox"/> Construction | 13 <input type="checkbox"/> Wholesale trade |
| 04 <input type="checkbox"/> Finance and insurance | 14 <input type="checkbox"/> Business services |
| 05 <input type="checkbox"/> Information, publishing and communications | 15 <input type="checkbox"/> Professional services |
| 06 <input type="checkbox"/> Manufacturing | 16 <input type="checkbox"/> Education and health-care services |
| 07 <input type="checkbox"/> Mining | 17 <input type="checkbox"/> Nonprofit organization |
| 08 <input type="checkbox"/> Real estate | 18 <input type="checkbox"/> Government |
| 09 <input type="checkbox"/> Rental and leasing | 19 <input type="checkbox"/> Not a business |
| 10 <input type="checkbox"/> Retail trade | 20 <input type="checkbox"/> Other (explain) _____ |

5. Reason for exemption. Circle the letter that identifies the reason for the exemption.

- | | |
|--|--|
| A <input type="checkbox"/> Federal government (department) _____ | H <input type="checkbox"/> Agricultural production # _____ |
| B <input type="checkbox"/> State or local government (name) _____ | I <input type="checkbox"/> Industrial production/manufacturing # _____ |
| C <input type="checkbox"/> Tribal government (name) _____ | J <input type="checkbox"/> Direct pay permit # _____ |
| D <input type="checkbox"/> Foreign diplomat # _____ | K <input type="checkbox"/> Direct mail # _____ |
| E <input type="checkbox"/> Charitable organization # _____ | L <input type="checkbox"/> Other (explain) _____ |
| F <input type="checkbox"/> Religious or educational organization # _____ | |
| G <input type="checkbox"/> Resale # _____ | |

6. Sign here. I declare that the information on this certificate is correct and complete to the best of my knowledge and belief.

Signature of Authorized Purchaser _____ Print Name Here _____ Title _____ Date _____

Understanding exemption certificates

An exemption certificate is the form presented by an exempt organization or individual to the seller when making a tax-exempt purchase.

Exemptions are based on the customer making the purchase and always require documentation.

UNIFORM SALES & USE TAX EXEMPTION/RESALE CERTIFICATE — MULTIJURISDICTION

The below-listed states have indicated that this certificate is acceptable as a resale exemption certificate for sales and use tax, subject to the notes on pages 2-4. The issuer and the recipient have the responsibility to determine the proper use of this certificate under applicable laws in each state, as these may change from time to time.

Issued to Seller: _____

Address: _____

I certify that:
Name of Firm (Buyer): _____
Address: _____

Customer # _____

Streamlined Sales and Use Tax Agreement

This is a multi-state form. Not all states allow all exemptions listed on this form. Purchasers are responsible for knowing if they qualify to claim exemption from tax in the state that would otherwise be due tax on this sale. The seller may be required to provide this exemption certificate to the state.

Certificate of Exemption

and is registered with the below-listed states as a wholesaler, retailer, or ingredients or components manufacturer, or in the business of wholesaling, retailing, manufacturing, or processing.

Description of Business: _____

General description of tangible property or tax-exempt service to be produced or sold: _____

State	State Registration, Seller's License, or Number of Purchaser
AL	
AR	
AZ	
CA	
CO	
CT	
DC	
FL	
GA	
HI	
ID	
IL	
IA	
KS	
KY	
ME	
MD	
MI	
MN	

I further certify that if any property or service purchased is sold or used in a taxable transaction, the tax due directly to the proper taxing authority on each order that we may hereafter give to you, we will pay the tax.

Under penalties of perjury, I swear or affirm that the information furnished is true and correct.

Authorized Signature: _____ (Owner)

Title: _____

Date: _____

Revised 1/29/2016

5. Reason for exemption. Circle the letter that identifies the reason for the exemption.

A <input type="checkbox"/> Federal government (department) _____	H <input type="checkbox"/> Agricultural production # _____
B <input type="checkbox"/> State or local government (name) _____	I <input type="checkbox"/> Industrial production/manufacturing # _____
C <input type="checkbox"/> Tribal government (name) _____	J <input type="checkbox"/> Direct pay permit # _____
D <input type="checkbox"/> Foreign diplomat # _____	K <input type="checkbox"/> Direct mail # _____
E <input type="checkbox"/> Charitable organization # _____	L <input type="checkbox"/> Other (explain) _____
F <input type="checkbox"/> Religious or educational organization # _____	
G <input type="checkbox"/> Resale # _____	

6. Sign here. I declare that the information on this certificate is correct and complete to the best of my knowledge and belief.

Signature of Authorized Purchaser _____ Print Name Here _____ Title _____ Date _____

SSTGB Form F0003 Exemption Certificate (3/10/11)

Forms by www.CartCaption.com

Avalara



When should you use
certain certificates?



When should you use
certain certificates?

MTC, SST, state-specific

Types of certificates

BOE-230 (7-02)
GENERAL RESALE CERTIFICATE

STATE OF CALIFORNIA
Customer # BOARD OF EQUALIZATION

California Resale Certificate

I HEREBY CERTIFY:

1. I hold valid seller's permit number:
2. I am engaged in the business of selling the following type of tangible personal property:
3. This certificate is for the purchase from _____ of the item(s) I have listed in paragraph 5 below. [Vendor's name]
4. I will resell the item(s) listed in paragraph 5, which I am purchasing under this resale certificate in the form of tangible personal property in the regular course of my business operations, and I will do so prior to making any use of the item(s) other than demonstration and display while holding the item(s) for sale in the regular course of my business. I understand that if I use the item(s) purchased under this certificate in any manner other than as just described, I will owe use tax based on each item's purchase price or as otherwise provided by law.
5. Description of property to be purchased for resale:

RESALE CERTIFICATES

Merchandise intended for resale

Tangible personal property
purchase to lease or rent

Taxable services performed on
tangible personal property in
resale inventory

New York State Department of Taxation and Finance – Audit Division
New York State and Local Sales and Use Tax

Direct Payment Permit

This permit constitutes authority to make direct payment of sales and use tax to the **Department of Taxation and Finance** in lieu of payment to the vendor.

This permit may be revoked for failure to comply with conditions under which it is issued, or for other reasons constituting misuse of the authority granted under the permit.

Orange & Rockland Utilities, Inc.
4 Irving Place Room 715S
New York, NY

Identification number	13-1727729C
Permit number	DP 101
Effective date	4/25/79

Mario Scarpese
Authorizing Signature

AU-297 (12/97) Not Transferable

OTHER TYPES

Direct Pay Permits

Manufacturing Exemptions
Agricultural Cards/Exemptions
State Issued Letters

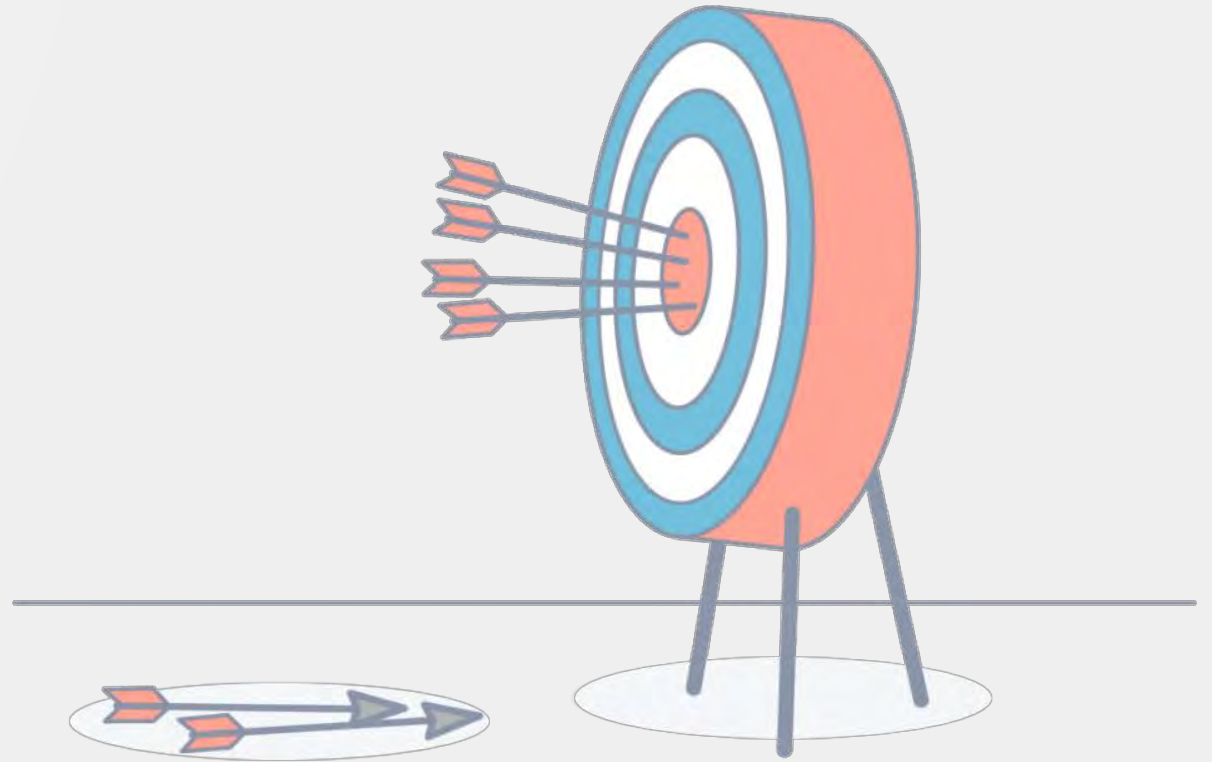
Why is exemption
management so difficult
to manage?

REASON 1:

Lack of awareness

“ Most of my sales are exempt, so I don't have to worry about sales tax...”

Exemption certificate management isn't about collecting tax but proving why you didn't. Sales tax may need to be collected as you move to sell directly to end users



REASON 2:

Customer management

- Customers feel burdened by providing accurate documentation on time
- It's presented as a billing issue because charges aren't done correctly
- Front-line employees need a smooth collection process to earn customer trust



REASON 3:

Internal Management



Internal Management

1

2

3

4

A single missing certificate could cost much more than the taxes you failed to collect

		Form ST-5 Sales Tax Exempt Purchaser Certificate		Rev. 6/00 Massachusetts Department of Revenue
Part 1. Exempt taxpayer information. To be completed by exempt government or 501(c)(3) organization.				
Name _____				
Address _____ 123 Main Street				
City _____ Alpha		State _____ MN	Zip _____ 99999	
Exemption number _____ 11111				
Issue date _____ 01/01/2014		Date of expiration of certificate _____ 01/01/2015		
<p><small>Certification is hereby made that the organization named above is an exempt purchaser under Massachusetts General Laws, Chapter 64E, sections 6(a) or 6(e). All purchases of tangible personal property or services by this organization are exempt from taxation under said chapter to the extent that such property or services are used in the conduct of the business of the purchaser. Any abuse or misuse of this certificate by any tax-exempt organization or its unauthorized use of this certificate by any individual constitutes a serious violation and will lead to revocation.</small></p>				
Signature _____		Title _____ Sales Engineer	Date _____ 01/22/2014	
Warning: Willful misuse of this certificate may result in criminal tax evasion sanctions of up to one year in prison and \$10,000 (\$50,000 for corporations) in fines.				
Part 2. Agent information. To be completed by agent of exempt government or 501(c)(3) organization.				
Name of agent's organization _____				
Address _____				
City _____		State _____	Zip _____	
Agent's name _____				
Address _____				
City _____		State _____	Zip _____	
<p>I certify that in making this purchase, I am acting as an agent for the exempt organization named above (select one):</p> <input type="checkbox"/> Government organization (local public school, city/town government, state agency, etc.) Attach Form ST-2, if available. If Form ST-2 is not available, enter exemption number, if known: _____ <input checked="" type="checkbox"/> 501(c)(3) organization (parochial school, Scout troop, etc.). Form ST-2 must be attached. Signature _____ Title _____ Date _____				
Part 3. Vendor information				
Vendor's name _____ Multi State Manufacturing dba MS Distribution				
Check applicable box: <input type="checkbox"/> Single purchase certificate (attach detailed receipts or complete Part 4, on reverse) <input checked="" type="checkbox"/> Blanket certificate				
Signature of Authorized Purchaser _____ 		Print Name Here _____ jason warren	Title _____ janitor	Date _____ 01/31/2014
<p style="font-size: small;"> In your return or application to receive sales tax exemption certificate, please contact: Massachusetts Department of Revenue, Customer Service Bureau, 200 Arlington Street, Chelsea, MA 02150; (617) 887-6367. </p>				

Exemption Management & the SST Program

Streamlined Sales Tax Program (SST)

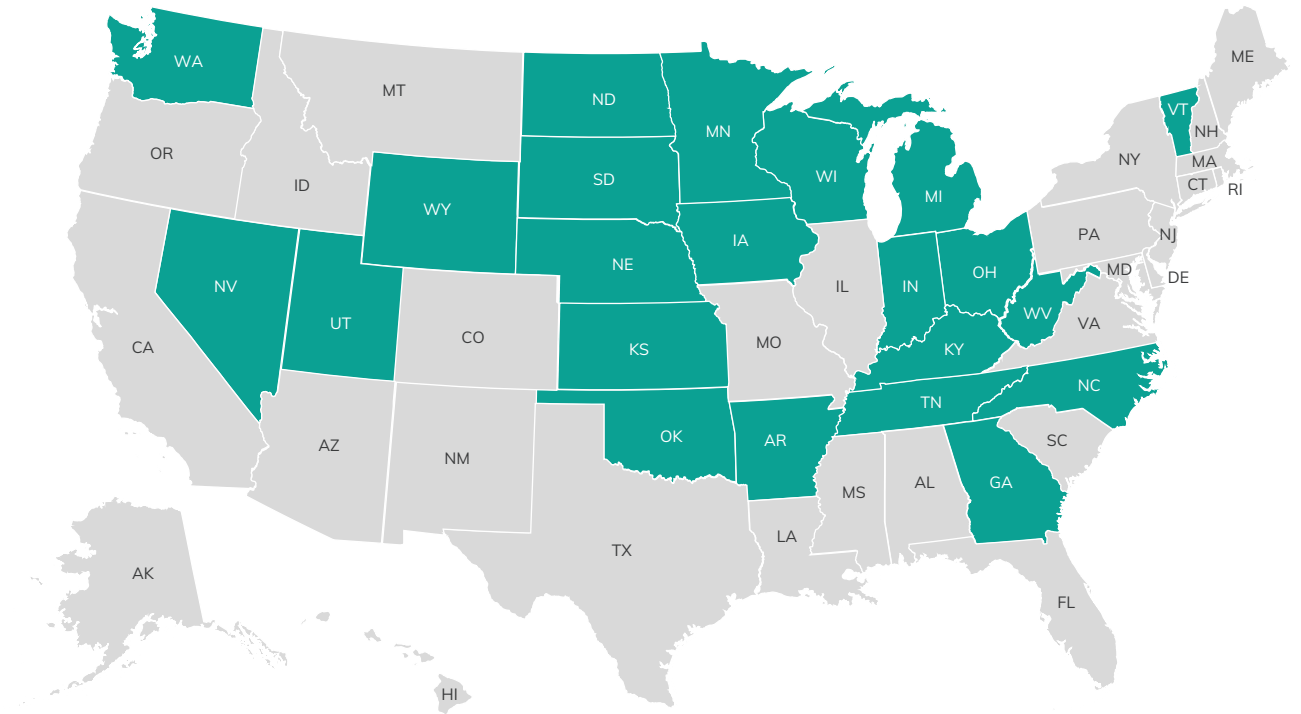
Free sales tax services for qualifying businesses

In up to 25 states, your business may qualify for:

- Free registrations
- Free tax calculations
- Free returns preparation and filing
- Audit assistance and response
- Uniform definitions and rules
- One registration and identification

*Avalara must verify a certificate or its data is on file to exempt the buyer from sales tax

SST member states



What is Exemption Certificate Management?

Exemption Certificate Management

Intelligent exemption certificate management



Shifts onus from seller to buyer



Eases need for tax expertise



Web-based automation and process centralization



Manual (paper) to automation (pixels)



Enables B2B online sales



Improves buyer experience and seller employee satisfaction



What is ECM?



ECM Pro

ECM Pro is the next-generation, best in class solution for exemption certificate collection and compliance management. Setting a new standard with a re-imagined user experience, industry-first certificate collection automation and intelligence, powerful campaign management tools, and expansive integration options.

Proof points

1

Re-imagined user experience based on simplicity – Ensuring improved compliance through proactive intelligent workflows

2

Industry-first, AI-powered automation of certificate review and validation – Saving valuable time and costs

3

Over 35 connectors, and robust open API architecture – Supporting best of breed integration solutions and key tasks from within leading ERPs

4

Deep integration with AvaTax, both in user experience and data – enabling a seamless experience with real-time updates

5

Powerful new campaign management tools, including automated renewal request and checkout flow eComm module integration – Streamlining the certificate collection process

How we do it



Online
shopping cart



Web portal /
ecommerce



In-store POS/
kiosk



Mail, email,
phone



Tablet / sales
force

- Real-time certificate completion for ecommerce checkout
- Point-of-sale and mobile device for sales associates in-store and field sales
- Online web portal for customers

How we are different

Automate your exemption certificate management process to collect, validate, store, and renew compliance documents in the cloud — securely and at scale



Collection done your way

Collect and validate new sales tax exemption certificates in-store, online, or in the field. Submit information through a secure web portal, or send pre-filled certificate requests to scan, fax, or email.



Turn paper to pixels

Existing certificates can be digitized through a powerful one-step validation, mapping, and certificate intake process.



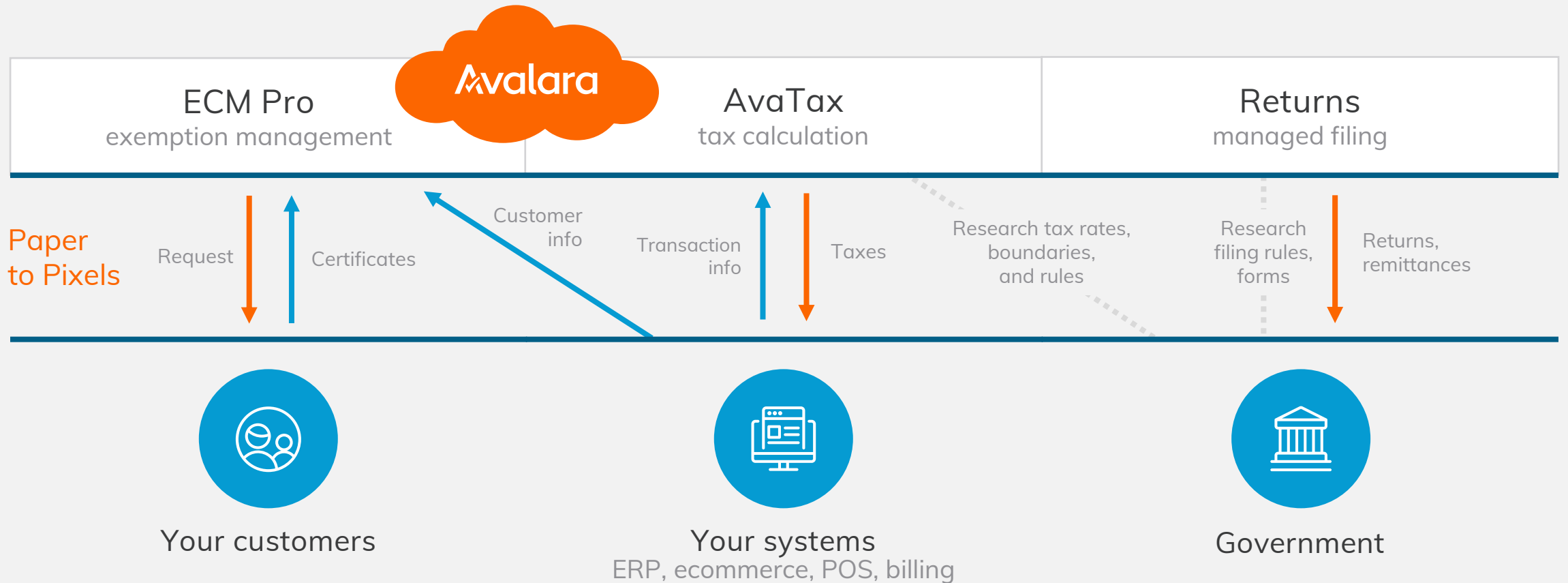
Stay in touch with customers

With a comprehensive customer mailing module, it's easier than ever to contact customers about issues such as by sending renewal requests before exemption certificates expire.

How does it work
with AvaTax?

Avalara Sales Tax Suite

Best Practice: End-to-end sales tax automation



How it works with AvaTax

TAX CODE PF050305
ENTITY USE CODE None

SHIP FROM 1243 OLD ROUTE 17 FERNDALE, NY 12734-5422 US
SHIP TO 2136 BELLAIRE AVE RALEIGH, NC 27608-1806 US

Sales

[Review this calculation >](#)

Are you collecting tax here?

☒ Yes

Is your customer taxable?

☒ Yes

Is the product or service taxable?

☒ Yes

JURISDICTION	TAX NAME	ADDRESS	RATE	EXEMPT	NON-TAXABLE	TAXABLE	TAXES/FEES
North Carolina State	NC STATE TAX	Destination	0.047500	0.00	0.00	100.00	4.75
Wake County	NC COUNTY TAX	Destination	0.020000	0.00	0.00	100.00	2.00
Wake Co Tr Special	NC SPECIAL TAX	Destination	0.005000	0.00	0.00	100.00	0.50
Total			0.072500				7.25



CertExpress

Create and send
free tax compliance
documents



We made it easy to **find, complete, and send** the right tax compliance document for your situation.

CertExpress contains over **1,000 unique, and state-specific exemption certificate forms in digital format** and enables certificates to be completed electronically and auto-validated.

With CertExpress, you can find confidence in:

1. Presenting the right form (for the right reason) to the buyer
2. Controlling all required fields, such as:

Date format (issue, expiration, etc.)

Phone number format

Pick Lists ("select one" or "select all that apply")

State abbreviations

Exemption reason / Type of business

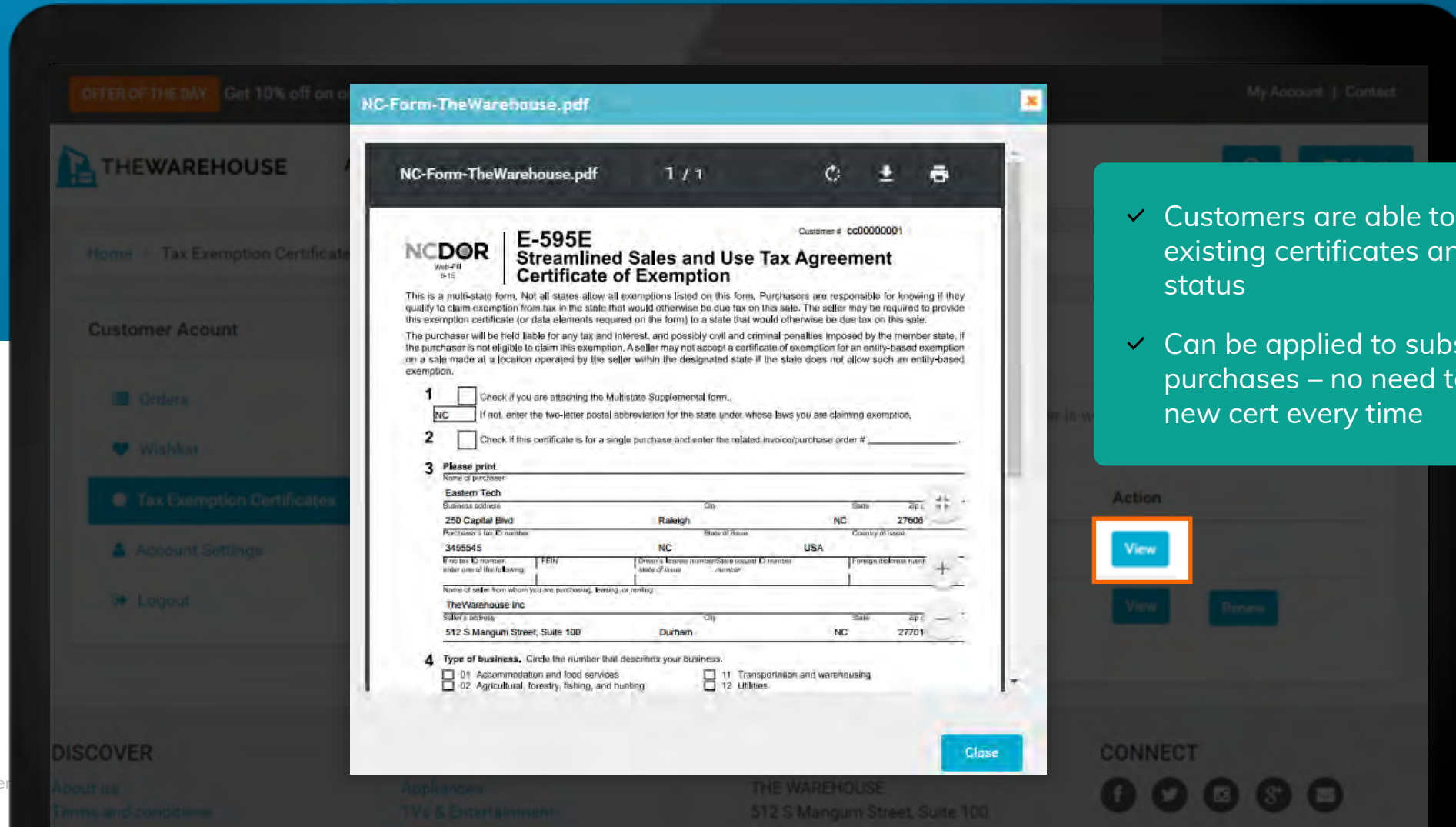
Any yes/no or checkboxes

Any other required fields

Benefits of ECM

One centralized location for all exception certificates

Allows customers to view and manage their exemption certificates from their customer portal



- ✓ Customers are able to view existing certificates and their status
- ✓ Can be applied to subsequent purchases – no need to collect a new cert every time

Collect exemption certificates in the shopping cart

Allows e-commerce retailers to embed CertExpress to collect exemption certificates right at the point of purchase

The screenshot shows a web browser displaying 'The Warehouse' website. At the top, there's a banner for 'OFFER OF THE DAY' with 'Get 10% off on orders over \$500' and links for 'My Account' and 'Contact'. The main content area features a light blue header with the store name and a navigation bar with four icons: a person, a folder, a pencil, and a checkmark. Below this is a section titled 'Business Information - North Carolina' with 'Fill Online' and 'Upload' buttons. The form itself is titled 'You are completing the North Carolina Streamlined Sales and Use Tax Agreement Certificate' and contains several sections: 'Business Information' with a dropdown for 'Select Yes if this certificate is for a single purchase' and another for 'Select an exemption number type'; 'Type of Business' with a dropdown for 'Select your type of business'; and 'Reason for Exemption' with a dropdown for 'Select your reason for exemption'. To the right of the form, a shopping cart summary is visible, showing 'Order \$446.00', 'Shipping \$10.00', 'Tax \$31.00', and a 'Total \$487.00'. A red box highlights a link 'Is this purchase tax-exempt?' below the tax amount. At the bottom right, there is a 'Place Order >' button.

OFFER OF THE DAY Get 10% off on orders over \$500 My Account | Contact

The Warehouse

Business Information - North Carolina Fill Online Upload

You are completing the North Carolina Streamlined Sales and Use Tax Agreement Certificate

Business Information

Select Yes if this certificate is for a single purchase

Please select one of the following...

Select an exemption number type

Please select one of the following...

Type of Business

Select your type of business

Please select one of the following...

Reason for Exemption

Select your reason for exemption

Order \$446.00

Shipping \$10.00

Tax \$31.00

Is this purchase tax-exempt?

Total \$487.00

Place Order >

- ✓ Launch CertExpress right at the point of purchase
- ✓ Collect & store certificates in ECM
- ✓ Apply the exemption to customer's real-time transaction calculations in AvaTax

Where is the sale sourced?

Access existing exemption certificates on file or easily collect new ones in-store

The image shows a tablet displaying the 'Exemption Certificate Wizard' interface. The screen is divided into several sections:

- Exemption Certificate Wizard** (Title)
- Section 1: Business Information**
 - Type of Business
 - Select Exemption Number Type *
 - Select Business Type *
 - Reason for Exemption
 - Select Exemption Reason *
 - Signer Information
 - Name *
 - Title *
 - Date (09/24/2015)
- Section 2: Certificate Details**
 - All fields marked (*) are required to generate your certificate.
 - Your Signature (A large rectangular box for a signature)
- Buttons**
 - Back
 - Next
 - Cancel
 - Start Over
 - Create Certificate

At the bottom, it says 'Certificate generation powered by CertCapture'.

How it works

- In-store employees can access ECM via a smartphone or tablet, or POS with internet access
- Quickly check to see if the customer has an existing certificate is on-file
- If not, they can collect it in a few clicks

Compliance Document Managed Services

Best practice: Engage Avalara SMEs to help you convert from paper to digital

Why Managed Services?

- ✓ Experts to convert your business from manual (paper) process to digital
- ✓ Subject Matter Experts in Compliance Documents / Exemption Certificates
- ✓ Allows focus on other aspects of the tax compliance project and revenue generating tasks
- ✓ Power Users
- ✓ Campaign Support (respond to buyer questions)
- ✓ Validation Rule Best Practices / Guidance



What's included?

- ✓ One Time (legacy) additions/conversion
- ✓ Certificate validation
- ✓ Tax ID Verification
- ✓ Customer campaigns (email and postal)
- ✓ A team of Subject Matter Experts
- ✓ Customized Validation Rules
- ✓ Ongoing additions and maintenance
- ✓ Reporting assistance
- ✓ Customized Validation Rules

Demo

AVATAX

PSE DEMO S

Overview

Resources

Customers

Incoming certificates to review

Certificate requests

Customer certificates

Finish setting up

2/6 complete

^ 1 Add to your

[Add locations for online marketplace and location-based reporting and filing](#)


[Add a user and set permissions](#)

✓ Done adding to my company profile




∨ 2 Connect to AvaTax

Tasks




14

Certificates expiring within 30 days



76


Incoming certificates to review




196

Customers missing certificates


Favorites




Add a customer




View all customers




Add a certificate



Request certificates from customers




View all certificates




ECM Reports


Resources




Avalara tax answers



Tax laws



Exempt entities



Certificate library

Insights

Compliance overview ⓘ

You have 38% of the certificates you need from customers

Expected	Valid	Needed
1,255 certificates	487 certificates	768 certificates



- Valid certificates (487)
- Invalid certificates (10)
- Certificates expired (361) ⓘ
- Missing certificates (397)

Exemption certificate 1838

Certificate History

Customers

Add a customer

New Cust Sept 22, 2022: 9222022 X

Region covered by this certificate

Florida X

Reason for the exemption

Resale X

Effective

10/11/2022



Florida taxpayer ID

Expiration

Reset to default

12/31/2022



☐ Limit this exemption to one document or purchase order

Select a status

Certificate status

Valid

Save

Cancel

Delete this certificate

+ Add a comment

Form reader

Image scan results

No issues found

Verified by Avalara

Details

The certificate appears to be complete and valid

Replace certificate



Split certificate

Attach a file



2022 Florida Annual Resale Certificate for Sales Tax

This Certificate Expires on December 31, 2022

DR-13
R. 10/21

Business Name and Location Address

Certificate Number

AVALARA INC
512 S MANGUM ST STE 100
DURHAM, NC 27701-3973

78-8015087723-4

By extending this certificate or the certificate number to a selling dealer to make eligible purchases of taxable property or services exempt from sales tax and discretionary sales surtax, the person or business named above certifies that the taxable property or services purchased or rented will be resold or re-rented for one or more of the following purposes:

- Resale as tangible personal property
- Re-rental as tangible personal property

Certificates

ECM reports

Search by customer name, customer code, or certificate ID

Filters

customer name, customer code, or certificate id



Manage columns



Add a certificate

☐ Show only active certificates

Filters



Saved searches

Certificate details

Certificate status

Regions covered by this certificate

Reason for exemption

☐ Single use purchase order or invoice number

Certificate IDs

Certificate ID	Customer name	Customer code	Region	Exemption reason	Effective	Expiration	Status	
1889	Smith Industries	23232	Georgia	Resale	10/4/2022	12/31/9999	Valid	...
1888	Smith Industries	23232	Georgia	Resale	10/4/2022	12/31/9999	Valid	...
1887	Smith Industries	23232	Indiana	Resale	10/4/2022	12/31/9999	Valid	...
1884	Will's Widgets	1131975	Arizona	Resale	9/29/2022	11/30/2022	Valid	...
1883	DAVE'S MARATHON PRODUCTS	DAVESMARATHONPRODUCTS	Florida	Resale	9/28/2022	12/31/2022	Valid	...
1882	Will's Widgets	1131975	Arizona	Resale	9/28/2022	11/1/2022	Valid	...
1849	Will's Widgets	1131975	Arizona	Resale	9/26/2022	10/31/2022	Valid	...
1839	Will's Widgets	1131975	South	Resale	9/23/2022	12/31/9999	Valid	...

Q&A

Continuing Professional Education (CPE)



Qualifying for credit

- Respond to 3 of 4 poll questions
 - Questions display for a limited amount of time
 - Select your answer and click submit
- Attend the full duration of the webinar
 - Attend at least 50-minutes to qualify



Downloading Certificate

- Download the certificate once you qualify
 - Find the Earn Certification box
 - Click the icon to download
- Those that qualify will also receive their certificate in a post-event email

Upcoming events

avalara.com/webinars

Events Calendar

- > 12/6 Understanding Harmonized System codes
- > 12/8 Managing international compliance changes
- > 12/13 Sales & use tax master class
- > 12/15 The evolution of tax in the digital age



Avalara