Avalara Exemption Certificate Management (ECM) Managed Services

Avalara Exemption Certificate Management (ECM) Managed Services offers options to suit your needs (Pro and Premium) supporting the collection, validation, and maintenance of *any size* exemption certificate portfolio. Outsourcing to our team lets you focus on your core business, leading to better efficiencies, cost savings, and improved compliance.

Avalara's exemption certificate specialists process hundreds of thousands of exemption certificates annually. Our in-depth understanding of tax-exempt selling and state-specific rules has enabled thousands of companies to satisfy compliance requirements, resulting in faster, easier, and less expensive audit results. Whether you are improving your certificate compliance process or going through a merger/acquisition, **Avalara's Exemption Certificate Management (ECM) Managed Services** can help.

Certificate Acquisition / Campaign Management

Utilizing the Avalara Exemption Certificate Management (ECM) Pro or Premium, the Managed Services team will create and send email and/or postal mail campaigns to your customers on your behalf leveraging Avalara ECM's collection tool called CertExpress. We support your onboarding project so you can begin with a complete set of validated documents, as well as ongoing renewal requests.

Certificate Validation

Whether exemption certificates are received into ECM via a campaign or individually collected or uploaded, our team of specialists will review each one in detail. We review every data point, cross-referencing with an expansive library of each state's (and local jurisdiction) laws. This includes making sure the right form is used, the form is fully completed and signed, the applicable expiration date is set, verifying the resale tax ID and format to the extent each state allows, and more.

Key Features

Avalara provides:

- Email and postal campaigns
- Data entry
- Expert validation
- Tracking of expiring certificates
- Renewal request campaigns
- Certificate status reporting
- Best practices on software use
- Best practices for successful campaigns
- Assistance with formatting your raw customer data for import
- Ongoing support

Benefits:

- Improve exempt sales compliance
- Minimize liability to the state for uncollected exempt sales tax
- Increase efficiency
- Outsource sales tax expertise
- Onboard faster
- Rest easy knowing you have a complete portfolio of documents that will remain up-to-date.
- Lower labor costs
- Allow your teams to focus on business operations and growth, not tax compliance
- Nearly eliminate time spent on exemption certificates during sales tax audits.

Reporting

While our Managed Services team will assist with report access and running, authorized users also have 24/7 access to a user-friendly and intuitive dashboard making it easy to locate whatever information you are looking for. Easily look up information for a particular customer, run reports of missing or expired certificates, or quickly and easily export reports *with images* during a sales tax audit. Knowing and proving you had a valid certificate on file on the date of sale has never been easier.

Why Avalara's Managed Services?
Knowledge. Expertise. Service.

What to Expect: After your business completes the ECM software setup, uploads clean exempt customer data, and creates a brief campaign project plan, Avalara will begin the campaign and validation process.

Campaign/Validate*

- Validate/upload existing documents (if applicable)
- Run Campaigns
- Validate new certificates

*By validate, we mean the certificate appears to be on the correct form and filled out completely. We can verify actual information on forms for supported states.

Maintenance*

- Validate added certificates (new and renewal)
- Run/share reports
- Send/fulfill campaigns as needed

*Ongoing, helps with continued compliance

Service Comparison Chart:

	Pro	Premium
Validation	✓	✓
Resale Tax ID Verification	✓	✓
Outbound Email Campaign	✓	✓
Standard Validation Rules and Cover Letter	✓	✓
Outbound Letter Campaigns		✓
Inbound Phone/Email Support for Campaigns		✓
Custom Validation Rules and Campaign Cover Letter		✓
Consultative Support (with settings and best practices)		✓
Assistance with Formatting Customer Raw Data for Import		✓
Support	Shared Support	Dedicated Support Contact

Getting started with Avalara ECM Managed Services is easy.
Take the next step toward more accurate and organized exemption certificate management. To learn more, visit us at Avalara.com