

Avalara Exemption Certificate Management Premium

Compliance for tax exempt sales made easy. Replace complexity with simplicity.

When combined with an increasingly complicated tax landscape, the expanded obligations of nationwide economic nexus mean businesses must adopt an efficient, sustainable, and scalable exemption certificate management process. This process needs to accommodate company size, the number of certificates you collect, and the intricacy of certain exemptions to avoid the hassles and significant penalties that often accompany tax audits.

Avalara's Exemption Certificate Management (ECM) Premium is a next-generation and best-in-class solution for exemption certificate collection and compliance management that sets a new industry standard. ECM Premium supports complicated exemption management and high-volume storage of certificates. Configurable options combined with automated workflows simplify and dramatically improve processes, with powerful tools for collecting, validating, and maintaining your business' exemption certificates. Standalone options provide easy integrations to existing 3rd party tax engines and business applications for unified workflows.

Customizations and Configurability

ECM Premium provides configurable options and customizations to fit multi-faceted needs, such as:

- **Advanced search and reporting-** allows you to customize search filters and data fields for efficient retrieval. Run dynamic reports with real-time exports that return insights that will enable responsive decision-making.
- **Brandable e-mails and configurable templates-** provide tools to easily brand/co-brand customer communications with your business information and logo
- **Configurable exemption rules-** provides built-in rules to help determine which form is required and how expiration is handled for each jurisdiction and exemption reason. These rules also help determine when and where tax should be exempted.

Automated Validation and Renewal

- **Exemption Certificate Express (ECE)-** reviews certificates entered through the customer portal with a simple collection process, including intelligent tools that guide buyers through certificate selection and completion, improving accuracy and minimizing customer rework. With Exemption Certificate Express, customers manage their own certificates, significantly reducing the need for follow-up.
- **Automated document validation-** uses optical character recognition (OCR) and machine learning to scan, read, and digitize certificates to capture field data and intelligently recognize incorrect forms and information or missing signatures. This enhanced validation, specifically used for state-issued forms (like the Florida resale certificate), is an industry-first.

Key Benefits

Reduce Risk

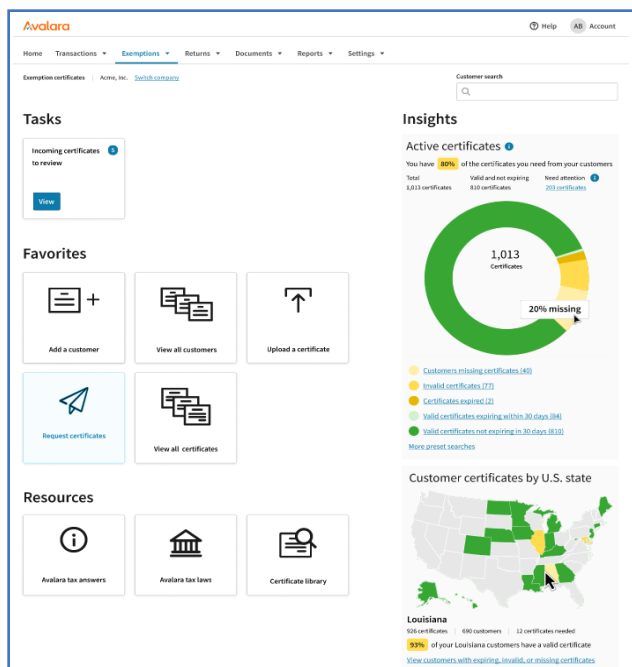
- Track certificate expiration and proactively request new ones
- Reduce potential errors through automated workflows
- Automate validation efforts to improve accuracy
- Respond to audits quickly and with confidence

Drive Efficiency

- Reduce time required to collect, review, and manage certificates
- Minimize the effort to track tax laws and expiry dates
- Reduce administration time to review and validate certificates
- Eliminate IT and security costs to maintain in-house systems
- Reduce the need for in-house expertise

Improve Customer Satisfaction

- Reduce customer time to upload valid certificates
- Help customers select and complete the right form without rework
- Allow customers to manage their own certificates, reducing constant follow-up and frustration
- Remind customers of upcoming expirations
- Minimize credits & rebills due to uncollected certificates
- Preserve customer privacy using a secure cloud-based service



The ECM Dashboard provides a holistic view of tasks that need to be worked, shortcuts to favorites, resources to help answer questions, and insights on stored certificates.

Professional Services

Avalara's team of experts will guide you through implementation to managing the collection, validation, and maintenance of your entire portfolio.

- **Implementation-** Avalara's specialists will lead you through user set-up, training, and customer data upload, ensuring your tax footprint is right for your business
- **Campaigns and Validation-** We will also assist in moving you from your current state to a fully digital exemption certificate process by validating existing and new certificates, running collection campaigns, providing customer support during campaigns, and proactively handling renewals while maintaining compliance on your behalf

Access and Security

- **Assign access-** for hundreds of users at varying permission levels. Allow multiple departments, locations, and divisions to have the access they need.
- **SOC 2, type 1 & 2 compliance-** ECM Premium will offer more securely hosted services and operational practices to preserve client and end-user privacy, increasing customer confidence. Soc 2, type 1 compliance is in place now, with Soc 2, type 2 compliance anticipated by January 2023.

- **Taxpayer ID validation-** uses real-time state verification systems (where available) to confirm that the taxpayer ID number is correct, improving certificate validity
- **Automated Certificate Renewal -** Track certificates that will be expiring to allow proactive measures for the collection and management of documents, including setting up an automated collection e-mail collection campaign

Omni-Channel Certificate Collection

Request, collect, and file exemption certificates instantly wherever you create sales or set up customer records.

- **Ecommerce shopping cart integration-** allows customers to submit exemption documents on the fly, enabling instant tax-free purchases while eliminating post-sale adjustments
- **Retail purchase integration-** allows physical retail locations to collect, verify, and apply exemptions to real-time transactions at point-of-sale from a mobile device or web-based POS for instant tax-free purchasing
- **Customer account integration-** enables customers to self-manage and submit exemption certificates when logged into their online account

Integrations

- **Tax Engines-** ECM Premium is integrated with Avalara AvaTax for real-time exemption certificate verification at the time of invoice and can also easily integrate with 3rd party tax calculation engines as a standalone product
- **ERP / Ecommerce-** ECM Premium is directly integrated with a growing number of ERP and e-commerce applications for easy management of exemption certificates within the customer record
- **APIs-** developer tools are available for those who want to build custom integrations

Getting started with Avalara
ECM Premium is easy.
Take the next step toward more
organized and accurate
exemption certificate
management.