

# Avalara CertCapture<sup>TM</sup>

Be confident. Be compliant. Be certain.

Speed account set-up and the sales process when you manage sales tax exemption certificates and W-9 forms with Avalara CertCapture. Automate your workflow for certificate requests, collection and reporting. Comply with current tax laws, manage your database and respond to audits.

## Automate

Automate the request for one certificate or create campaigns that reach thousands of customers in just a few clicks. Send cover letters and pre-filled certificates with barcodes to speed processes. Scans, faxes and emails populate your database. Customers access the wizard on the secure web portal to complete and sign a certificate in minutes.

## Manage

Missing certificates during an audit can result in fees, fines and penalties. Go from searching for certificates to managing them with real-time updates. Track upcoming renewals and expirations. Know your financial exposure from missing certificates with automated reports that are delivered directly to your inbox.

## Integrate

Avalara CertCapture integrates with hundreds of ERP, accounting, tax decision and POS solutions - including in-house solutions. Master customer data is related to your certificate database and customer taxability status is updated in your tax software. When a valid certificate is added, the customer becomes non-taxable. A missing or expired certificate will code the customer as taxable. You are always compliant. A stand-alone option is available.

## Access

Assign access for hundreds of users at varying levels of permission. Allow multiple departments, locations and divisions to have the access they need.

## Respond

Respond to audit requests with ease. Copy and paste an auditor's list to quickly search the entire database and know exactly which certificates are missing or invalid. The auditor's portal makes it easy to manage multiple audits.



Join dozens of Fortune 500 companies that rely on Avalara CertCapture to manage their exemption certificates and W-9s

## Save Time

- Certificates stored digitally in the cloud
- Automatic updates to tax laws and expiry dates
- Fast ID lookup via links to state websites

## Save Money

- Usage model pricing
- No hardware or IT support needed
- No licenses to renew

## Save Resources

Add Managed Services to your account to:

- Track expiring certificates and send renewal notices
- Manage customer requests for tax forms
- Flag incomplete or invalid certificates



Get started with  
Avalara CertCapture  
today.

Call 877-780-4848  
Visit: [www.avalara.com](http://www.avalara.com)

# CertCapture's powerful tools manage your exemption certificates and W-9 forms with ease.



## Certificate Request

Send certificate requests to your entire database or just one customer. Create pre-filled certificates and cover letters in just a few clicks and distribute them as hard copies, faxes or emails. Schedule collection campaigns with multiple mailings based on response.



## Collection

Certificates populate the database through scan, fax, email and the secure, online wizard. Data required for a valid certificate, including the signature, is captured in the easy, step-by-step process. You are compliant and the order is not delayed.



## Storage

Certificates are stored in the cloud to facilitate access, speed transaction processing, enable reporting, and simplify audit response. Databases scale into the millions so you always have room to grow while you only pay for the level of storage you use.



## Software Integration

Certificate information integrates with your master customer data and tax decision software. Associate certificates with transactions, purchase orders, and drop-shipments. Ensure accurate tax status is applied and reduce short pays. .



## Renewal Management

Track certificate expiration dates and send renewal requests for certificates before they expire. Avalara CertCapture can flag a customer as taxable until a valid certificate arrives and you are always compliant.



## Managed Services

This account upgrade outsources the certificate management process to Avalara. We'll take care of it all including certificate entry and validation, expiration and renewal tracking and reminders, inbound customer inquiries and status reporting.

End-to-end compliance + accuracy for all your transactional tax needs.

## Avalara AvaTax

### Calculation

Automating the sales tax calculation/decision process saves time, money and effort. Avalara AvaTax dynamically delivers billions of tax decisions and applies them across 12,000+ jurisdictions at the point of transaction, fully integrated with your billing system or ERP.

## Avalara Returns

### Returns & Filing

Ensure timely and accurate transactional tax filing and remittance - with simplicity. File returns and remit payments on time using a single payment solution. Whether the jurisdiction requires e-filing or mailed in hard-copy returns, Avalara Returns performs the job.



Getting started with Avalara CertCapture is easy.  
Take the next step toward toward organized exemption certificate management.

Call: 877-780-4848

Visit: [www.avalara.com](http://www.avalara.com)