

Avalara CertCapture™

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.



Avalara CertCapture is the enterprise-level application for managing sales tax exemption certificates and W-9 forms. It is relied upon by Fortune 500 companies.

Save time and know your information is correct.

- A library of current certificates.
- Current tax laws and expiration dates are automatically updated in the CertCapture database.
- Links to state websites for quick ID number checks.

Affordable

- Pricing scaled to the number of certificates stored.
- Automatic updates.
- Training is included.
- No hardware to buy or maintain.
- No ongoing IT support needed.

Avalara™

Get started with
Avalara CertCapture
today.

Call 877-780-4848
Visit: www.avalara.com

The Power of CertCapture: Limit audit liability with powerful tools to manage your certificate and W-9 databases 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.

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 100,000+ taxability rules and applies them across 11,000+ 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.

Avalara

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