

Retail

Collect and validate exemption certificates at the point of sale

Avalara CertCapture for Retail makes it easy to collect and verify sales tax exemption certificates in-store at the point of sale (POS).

With CertCapture for Retail, your salespeople are able to easily look up exemption status to see if a customer qualifies for tax exempt purchases. Or they can digitally create one in minutes. Retailers will have the confidence all the required information is collected before the sale is made and that the certificate will be stored securely and available on-demand at any time.

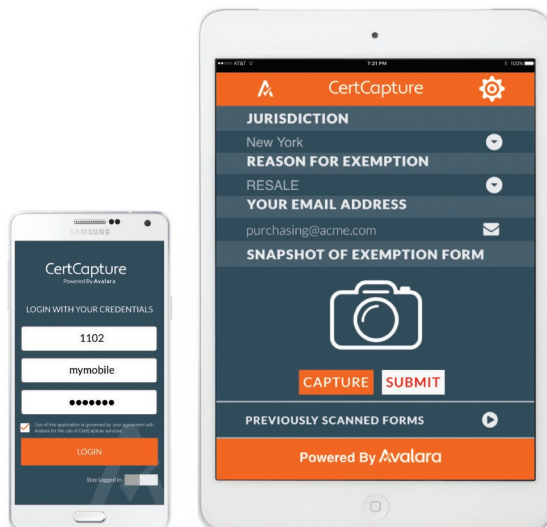
With the ability to integrate with hundreds of other solutions, CertCapture for Retail is an essential tool for any company looking to minimize audit exposure and improve customer service.

The Challenge

Validating a customer's exemption status during checkout has the potential to cause delays and may require many employees to get involved. If a retailer is not able to handle the tax exempt sale, time is lost, costs increase and customer satisfaction goes down. If you do not enable buyers to make tax-exempt purchases in store, it is likely they will go to another retailer that does. If you are able to collect the certificate, it is essential for it to be integrated with other essential systems for filing and reporting later.

The Solution

CertCapture for Retail removes these challenges. This cloud-based, automated solution makes it easy to verify, collect and store sales tax exemption certificates at the POS—on a mobile device, system register or tablet. CertCapture for Retail will play a critical role in determining whether your customers qualify for exemption at checkout, in turn helping you avoid delays and ensure a positive customer experience.



Collect and Validate
Certificates at Checkout



Remain Compliant and
Be Audit-ready

“ We no longer have to wait for each store to send in paper certs. Information is entered in real-time and available immediately, putting us back in control of the process instead of waiting for information to filter in. With data immediately available, I can pull 300-400 certificates in four hours or less—that’s down from months of work. CertCapture has made the audit process tremendously easier and far less painful. ”

Greg Moosbrugger
Tax Analyst, Northern Tool + Equipment



Integrate with tools you already use

Hundreds of third-party integrations allow you to incorporate exemption certificate management right into your current workflows so you can collect, create and validate at any point of sale including checkout registers, tablets and mobile phones. From CRMs and ERPs to order management software and in-house solutions, Avalara CertCapture for Retail makes it easy to capture exemption certificates and run reports at any time, from anywhere.



Priced to scale with your business

Avalara CertCapture for Retail scales with you as your business grows. You'll only be charged by the number of exemption certificates stored. The intuitive, simple-to-use interface can be easily rolled out to stores and employees with minimal training required.

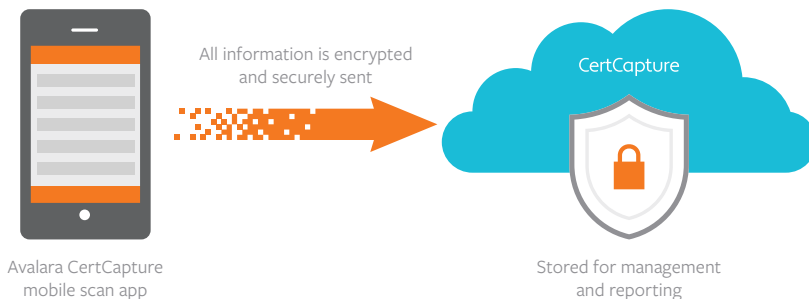


Conveniently mobile

The **CertCapture Mobile Scan App** allows retailers to conveniently take a photo of the tax exemption certificate on smartphones and tablets. Just answer a few easy questions about the state where the exemption is valid, the reason for the exemption, and ask for a contact email to use for any communication about the exemption. Then, simply capture a picture of the certificate, review it and hit submit.

All information is encrypted and securely sent to CertCapture for management and reporting. It's that easy.

You can even see other certificates submitted that same day to help you keep track of what has already been handled, which will all be auto deleted from the device after 24 hours for additional security. No matter where the sale takes place, the certificate can be captured quickly and easily on the devices customers are most accustomed to using every day.



ONE SOLUTION. MANY BENEFITS.

- ✓ Keep current with tax exemption rules for every state
- ✓ Quickly retrieve certificates for reporting and audits
- ✓ Cloud-based storage—no hardware to purchase and maintain
- ✓ Easy access to exemption status and certificates at POS
- ✓ Full library of current state certificates
- ✓ Secure, easy-access digital storage
- ✓ Pricing scaled to the number of certificates stored
- ✓ Assign user access at varying levels of permission

More than 2,000
customers trust Avalara
CertCapture to securely
manage 17,000,000
compliance documents.

About Avalara Compliance Document Management

Avalara Compliance Document Management helps organizations achieve compliance with automated solutions that are fast, accurate and easy to use. We have solutions specifically to manage sales tax exemption certificates, federal withholding documents (Forms W-8 and W-9) and excise business licenses.