VERTEX®

Exemption Certificate Wizard

Self-service digital certificate creation for Vertex Indirect Tax Solutions

Exemption certificate management is a labor-intensive part of sales tax compliance, especially for growing companies. And time is money. The Exemption Certificate Wizard lets your customers create and submit new certificates directly to Vertex Indirect Tax solutions. Your customer simply follows a series of guided questions, and the Wizard determines the certificates needed, populates them, and submits them.

Benefits

+ Provides end-to-end process from customer submission to exempt transactions
+ Reduces certificate errors and improves audit performance
+ Helps lower audit reserves
+ Increases productivity through automation
+ Streamlines internal tax processes

Key Functionality

+ Identifies and completes the certificate(s) needed based on a series of guided questions requiring no tax expertise
+ Creates multiple certificates from a single set of questions
+ Enables electronic signature on all certificates
+ Automatically submits certificates to Vertex Indirect Tax solutions, creating a new exemption record for each one

Customer Use Cases

Scalability

+ Large manufacturer: 250,000 certificates
+ **Pain Point:** Rapidly expanding business, manual processes are not scalable
+ **Solution:** Exemption Certificate Wizard can accommodate a rapid increase in customer certificate requirements

Tax Staff Utilization

+ Technology company: 4,000 certificates
+ **Pain Point:** Limited tax department staff, not enough time to spend on strategic tax work
+ **Solution:** Exemption Certificate Wizard automates time consuming steps in the certificate management process, freeing up time for more value-added work

Easy as 1-2-3

Using a series of guided questions, the Exemption Certificate Wizard will:

1.

Identify which certificate(s) are needed for the customer.

2.

Populate the audit-ready certificate(s) and capture an electronic signature.

3.

Submit the certificate to your Vertex Indirect Tax solution.

Simple User Interface

Simple clean UI guides users through a series of questions to create, sign, and submit the required certificate(s).

Exemption Certificate Wizard

You are creating a certificate for New York.

Select a reason for the exemption *

- ○ Agricultural
- ○ Charitable
- ○ Contractor
- ○ Direct Mail
- ○ Direct Pay Permit
- ○ Educational
- ○ Federal Government
- ○ Foreign Diplomat
- ● Manufacturing
- ○ Native American
- ○ Packaging
- ○ Religious
- ○ Resale
- ○ State or Local Government
- ○ Other

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Exempt UseCertificate

Select the purchases eligible for exemption *

- ☑ Machinery and equipment, parts tools and supplies
- ☐ Fuel
- ☐ Gas
- ☐ Electricity
- ☐ Refrigeration
- ☐ Steam
- ☐ Gas, electric, refrigeration or steam service

Certificate of Authority Number *

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Signature Information

electronic certificate and to entitlement to the exclusion of exemption from sales or use tax claimed via my submission of this electronic certificate to the seller.

Name *

John Doe

Title *

Approver

Effective Date *

09/21/2018

Signature *

John Doe   Clear

Upload

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Setup & Maintenance

Content Updates	Monthly data update maintains the latest exemption rules and certificate forms.
Setup & Configuration	Simple administrator setup. Configurable to specific business scenarios, processes, jurisdictions, taxability.
Deployment Options	SaaS solution you can deploy on your website or e-commerce platform.
Integration with Vertex Indirect Tax solutions	Integrates with Vertex O Series and Vertex Cloud Indirect Tax solutions.

For more information visit **www.vertexinc.com**

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