

# 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. Customers simply follow a series of guided questions, and the Wizard determines the certificates needed, populates them, and submits them.

### Benefits

- + Supports an 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

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

The screenshots illustrate the three-step process:

- Exemption Certificate Wizard:** A list of reasons for exemption for New York, including Agricultural, Charitable, Contractor, Direct Mail, Direct Pay Permit, Educational, Federal Government, Foreign Diplomat, Manufacturing (selected), Native American, Packaging, Religious, Resale, State or Local Government, and Other.
- Exempt Use Certificate:** A list of purchases eligible for exemption, including Machinery and equipment, parts tools and supplies (checked), Fuel, Gas, Electricity, Refrigeration, Steam, and Gas, electric, refrigeration or steam service. A field for Certificate of Authority Number is also present.
- Signature Information:** A form for submitting the certificate, including fields for Name (John Doe), Title (Approver), Effective Date (09/21/2018), and a signature field with a handwritten signature. There is also an Upload button and a Clear button.

## Setup & Maintenance

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

For more information, visit [www.vertexinc.com](http://www.vertexinc.com)

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