



## INDIRECT TAX Certificate Manager

### Minimize Risks with Seamless Integration

Thomson Reuters ONESOURCE™ Indirect Tax Certificate Manager is a solution for the precise tracking, validating, and governing of exemption certificates. As part of ONESOURCE the new user interface is consistent with our Tax and Accounting standards, it provides an integration to our ONESOURCE Indirect Tax determination software.

ONESOURCE Indirect Tax Certificate Manager offers our clients the flexibility to be deployed either on-premise or in the cloud. The solution improves efficiency in all aspects of the burdensome, exemption-certificate lifecycle by reducing operating costs, mitigating risk, and increasing accuracy.

Customer exemption certificates are a critical component to the sale and purchase of goods globally. In the United States, paper or electronic exemption certificates are required to release customers from paying sales for either entity-based (government or charity) or use-based (manufacturing or resale) reasons. Certificates may apply to transactions from the local to national authority level.

Since sellers are responsible for sales tax remittance, they must maintain accurate records for their customers' exemption certificates. Customer exemptions are a frequent target of sales tax audits, and managing certificates is critical to avoid future penalties. Some retailers and manufacturers require dedicated resources to manage the millions of customer exemption certificates.

#### MINIMIZE RISK

Poor or nonexistent exemption certificate management is recognized as the leading cause of audit exposure for today's corporate tax department. Many companies struggle with managing paperwork, complicated software, or the collection and locating of exemption certificates to avoid audits, penalties, and interest.

ONESOURCE Indirect Tax Certificate Manager reduces audit exposure and assessments while empowering you with full control of the exemption certificate process to maintain compliance. The solution allows for the assignment of local authorities, product codes, commodity codes or limited use filter criteria to exemption certificates.

In addition to data capture, you will save time and investment by enabling:

- Collection, storage, and tracking of all exemption and resale certificates
- Efficient management of the auditor's request with the ability to quickly access all of your certificates in seconds with our robust search engine – even from remote locations
- The display, print, or archiving of your exemption certificates, as needed
- Improved efficiency of internal processes by enabling your certificates to be reviewed for completion to promote increased accuracy

## WHY ONESOURCE INDIRECT TAX CERTIFICATE MANAGER?

### Proactive

Enables the tax department to stop reacting on a case-by-case basis while eliminating expired, rejected, and misplaced certificates.

### Consolidated Repository

Facilitates the accumulation, electronic storage, and maintenance of valid exemption certificates in a consolidated repository and reduces or removes the need to store paper copies of certificates in storage cabinets.

### Seamless, Real-Time Integration

Seamless, real-time integration with Determination giving you piece of mind that you are tax compliant.

### Secure Web-Based Solution

Role-based security enables you to grant users with the authentication and authorization access to this web-based solution.

## FEATURES

### Exemption Certificate Management

Full management of exemption certificates in a single, centralized repository. Complete image management and streamlined image retrieval. Built-in workflows to manage internal processes of exemption certificates.

### Determination Integration

Directly integrated so exemptions can be immediately applied to Determination tax engine, resulting in more accurate tax calculations and less exemption status disputes.

## Notifications

Robust mail-merge tools enable you to easily create email for your customers, reminding them that their exemption certificate is about to expire and includes a copy of the most recent form.

## Built-in Forms Library

The comprehensive forms library, with over 300 certificates, is maintained and updated by the Thomson Reuters tax research team.

## Customized Reporting

Easily create your own ad-hoc reports with flexible filters to quickly identify the key pieces of data for your organization. Export any reporting data for archive or auditor purposes.

## Gain peace of mind with:

- Eliminating missing certificates
- Seamless integration
- Electronic storage of all exemption certificates
- One secure, web-based application to store all required information

Contact us at [1.800.865.5257](tel:1.800.865.5257) or learn more at [onesourceindirecttax.com](http://onesourceindirecttax.com).

## About Thomson Reuters

ONESOURCE Indirect Tax is part of the Tax & Accounting business of Thomson Reuters, with solutions designed to help companies effectively and efficiently comply with the growing complexity of indirect tax requirements around the world, including sales and use tax, VAT, GST, and industry and country-specific taxes. The ONESOURCE Indirect Tax solution was formed from three renowned brands: Sabrix, Abacus VAT Compliance, and ONESOURCE Sales & Use Tax. ONESOURCE Indirect Tax offers end-to-end global software solutions and consulting services to streamline tax planning, indirect tax determination, calculation, reporting processes, and local tax compliance for small- to medium-sized businesses and global 2000 multinational corporations.

### CONTACT US TODAY

 [1.800.865.5257](tel:1.800.865.5257)

 [onesourceindirecttax.com](http://onesourceindirecttax.com)

 [onesource.indirecttax@thomsonreuters.com](mailto:onesource.indirecttax@thomsonreuters.com)

