

How to get the most out of ECM Pro (formerly known as CertCapture)



Disclaimer

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Meet your presenter



Greg Penhaligon

Senior Product Manager

Avalara

Greg is a Senior Product Manager at Avalara with over 15 years of experience creating and launching successful customer-centric products. Prior to Avalara, Greg was the Director of Product Management at Vanco, and a product manager at CNET. Greg resides in Durham, North Carolina, but his heart is back in San Francisco.

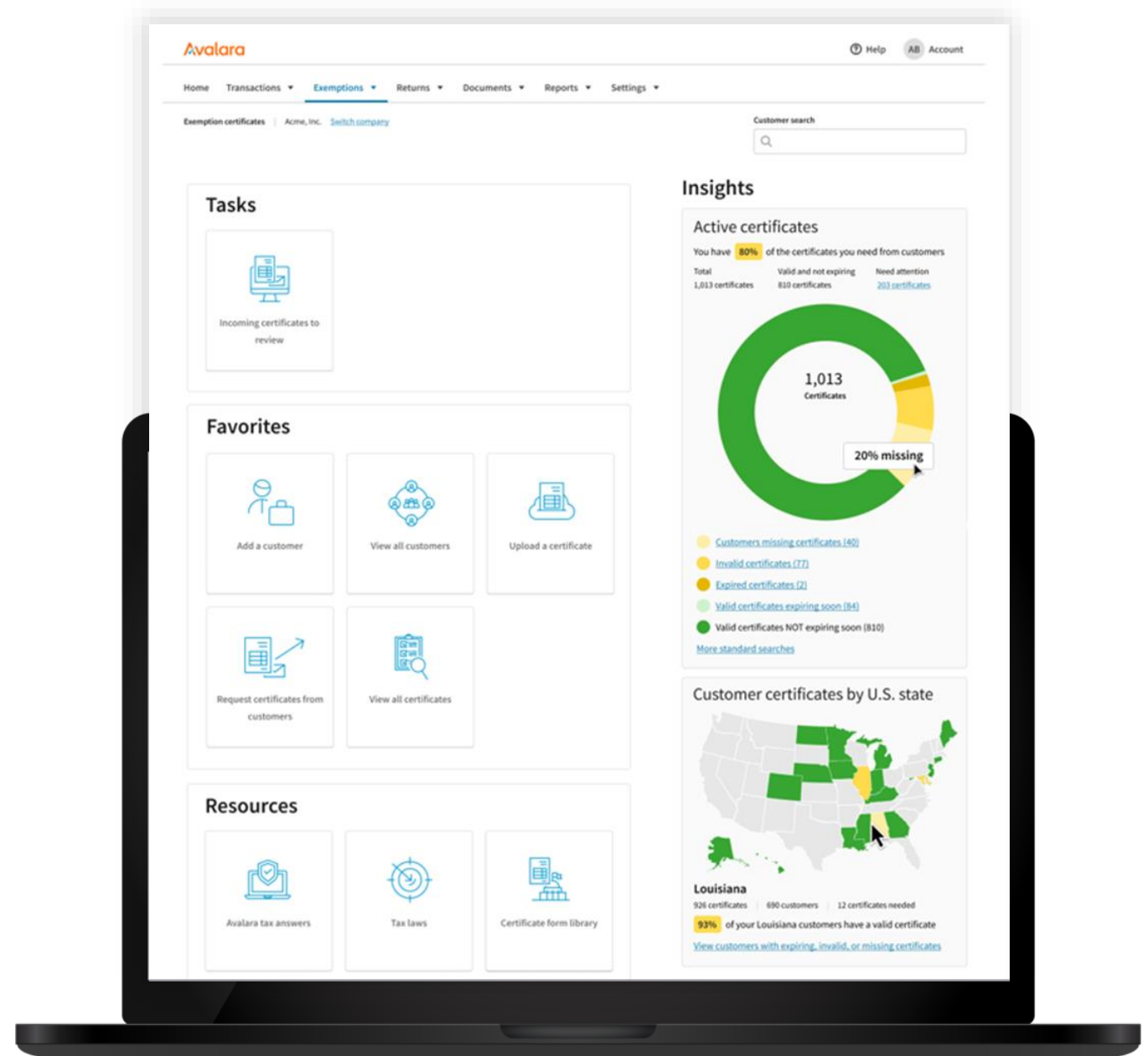
Agenda

- 1 > What is Avalara ECM?
- 2 > How current CertCapture customers transition to ECM
- 3 > Why Avalara is replacing CertCapture with ECM
- 4 > What's different?
- 5 > 4 features to get the most out of ECM
- 6 > Q&A
- 7

What is Avalara ECM?

ECM Experience

- › Really easy to use
- › Automated certificate validation
- › Automated certificate requests
- › Automated "exposure" reporting
- › Tax law help content



Vendor Exemption Management



Adds control to procurement process



Minimizes time and need for tax expertise



Allows web-based automation and process centralization



Creates pre-populated certificates (signature)



Improves vendor/supplier relationship, creates more efficient buying process

- Automates vendor exemption management workflow
- Supports efficient use of business resources
- Enables Centralized Storage
- Improves supply chain agility and efficiency

How current
CertCapture customers
transition to ECM

How will current CertCapture customers transition to ECM?



If you are a CertCapture customer in 2023 you will receive an email about the ECM launch along with instructions on how to transition into the new interface



For a limited period, you will then have access to both CertCapture and ECM



All customer data, certificate images, and product settings will be preserved in the transition



There will be minimal action required by you in the process



After the transition period, the legacy CertCapture interface will no longer be available



What's different?

What can you expect with ECM Pro?



Front-end UX

- Simplified and streamlined user interface integrated within the Avalara platform
- Customer Exemption & Vendor Exemption certificate management
- Automated certificate review and validation using optical character recognition (OCR)
- Automated tax ID validation
- Integrated TTR tax law and exemption content



Back-end Platform

- Additional certificates and forms supported
- Deeper integration with AvaTax (for customers with AvaTax accounts)
- No data migration necessary for CertCapture customers



Risk & Security

- Avalara Identity
- SOC 2 Type, 2 compliant

The ECM Suite

Other universal features:

- [Easy access from one navigation bar](#)
- [Single Sign-on](#)
- [Easy to navigate dashboard](#)
- [Certificate creation portal](#)

EXEMPTION CERTIFICATE MANAGEMENT FEATURES	ESSENTIALS	PRO	PREMIUM
ECM Essentials			
SOC 2, Type 1 compliance (Type 2, 2023)	✓	✓	✓
API & Connectors	✓	✓	✓
Customer Exemptions & Certificate Storage	✓	✓	✓
ECM Pro			
Basic Reports		✓	✓
Automated Document Validation with OCR		✓	✓
Certificate collection campaign management		✓	✓
Enhanced state tax ID validation		✓	✓
Integrated tax laws and exemption rules content		✓	✓
Co-brandable emails and custom templates		✓	✓
eComm Module		✓	✓
Exemption Matrix – customize and view exempt regions and reasons		✓	✓
Certificate Storage		✓	✓
ECM Premium GA – April 2023, with iterative releases through 2023			
Custom data fields, attachments & comments			✓
Advanced Search & Reporting			✓
Advanced workflow features and customization			✓
Fully customizable Exemption Matrix			✓
Retail Module			✓
SSO & Customer User Roles			✓

4 features to get the
most out of ECM

Demo

Now's the time to take out your laptops and follow along

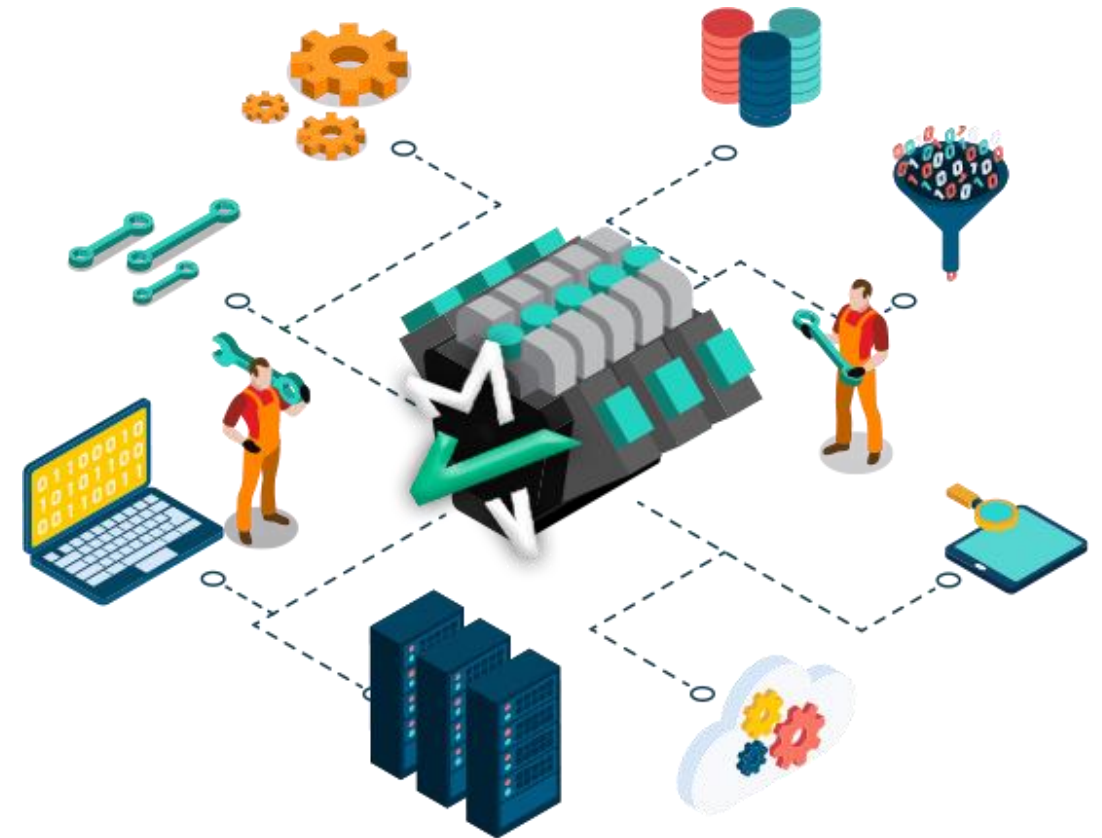
A stylized illustration of a laptop with a dark grey or black frame. The screen is a solid blue color, matching the background. Centered on the screen is white text. The text is arranged in two lines: the first line reads "Auto Validation Service –" and the second line reads "Leveraging ML & OCR processing".

Auto Validation Service –
Leveraging ML & OCR processing

Automated Document Validation with Optical Character Reader (OCR)

Ground-breaking technology

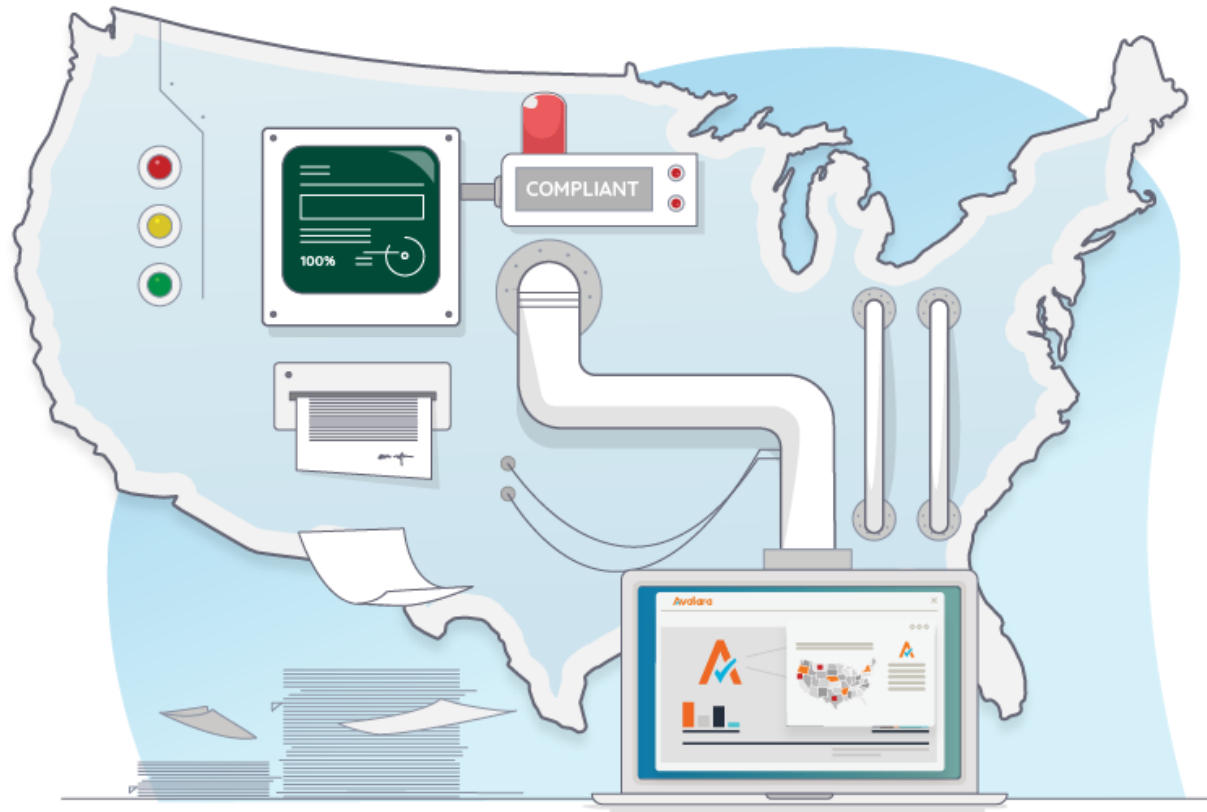
- OCR technology recognizes text within digital images
- ECM uses OCR technology to read and capture data from many standard exemption certificate forms, automatically adding that data to the platform for reporting and tracking.
- For many standard forms, it also determines the form's validity*.
- Digital forms can be uploaded into the portal or directly into ECM



[Back to feature comparison chart](#)

*By valid, we mean that the certificate appears to be on the correct form and filled out completely. We can verify actual information on forms for supported states.

Common forms supported by Automated Document Validation with OCR



Documents recognized as of July 2022:

Florida resale certificate

Florida consumer certificate of exemption

Louisiana resale certificate

Washington reseller permit

New York exempt org certificate

Missouri sales and use permit

Mississippi retail sales tax permit

Mississippi resale permit

Illinois sales tax exemption certificate


Colorado contractor's exempt certificate

[Back to feature comparison chart](#)

[Screen Shot](#)

A black laptop is shown from a top-down perspective, open. The screen is a solid blue color and contains white text. The text is centered and reads: "Tax Law Content – specific to exemption certificate management".

Tax Law Content – specific to
exemption certificate
management

A stylized illustration of a laptop with a black frame and a blue screen. The screen displays the text "Auto-request certificates via e-mail" in white, centered. The background is a solid blue color.

Auto-request certificates
via e-mail

A black laptop is shown from a top-down perspective, centered against a solid blue background. The laptop's screen is open and displays the text "CertExpress online portal" in a white, sans-serif font. The text is centered horizontally and vertically on the screen. The laptop's keyboard and trackpad are visible at the bottom edge of the device.

CertExpress online portal

Questions

Upcoming events

avalara.com/webinars

Webinars

- > 9/26 Key compliance issues in procure to pay (1 CPE credit)



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Tax compliance done right