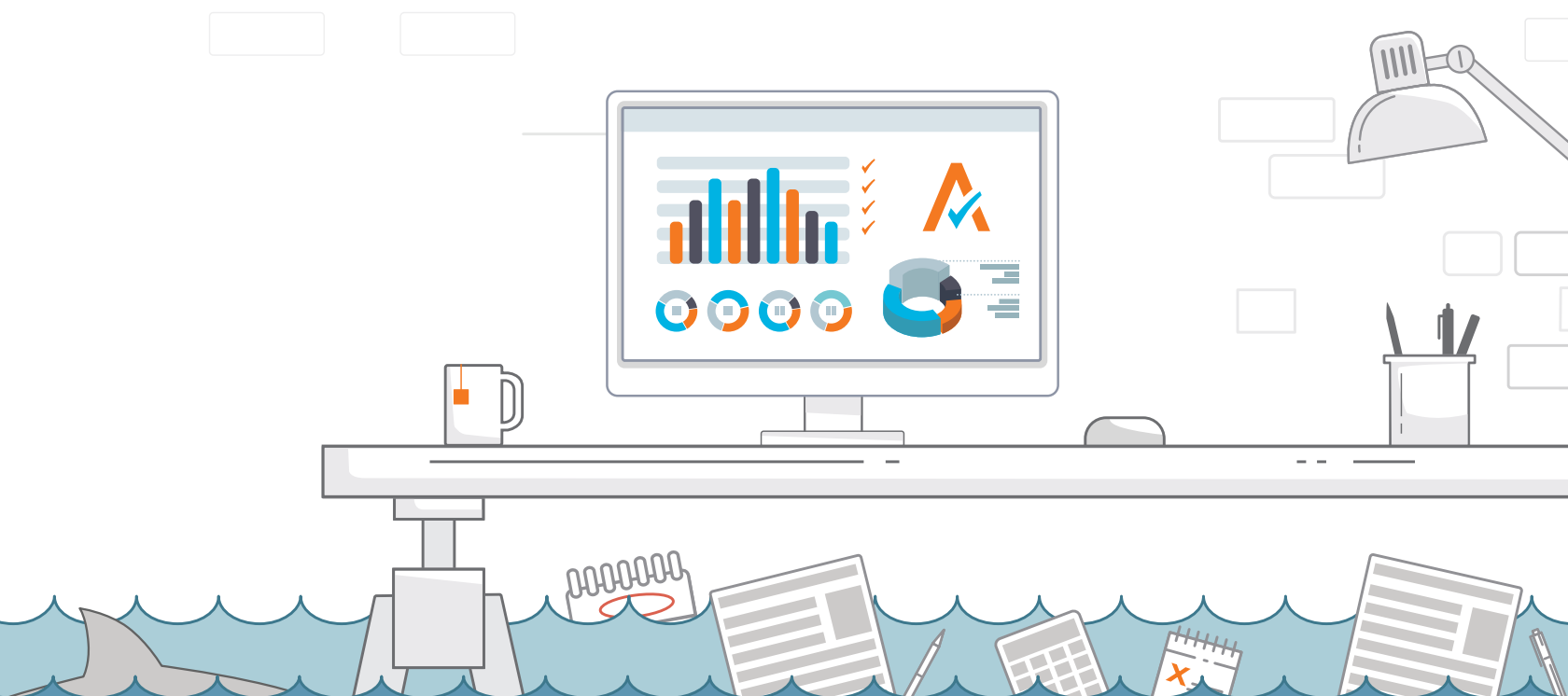


# GET A GRIP ON TAX COMPLIANCE

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AVALARA PRODUCTS AND SERVICES



## It's time for your tax compliance to keep pace with your business.

Since 2004, Avalara has provided customers with tools to improve accuracy and efficiently manage compliance in a modern business landscape. In 2004, that landscape was the new opportunity of broadband internet. Today, it's operating in a fully digital, omnichannel world to keep pace with competitors from around the world.

We understand that the changing compliance landscape makes this an impossible task for anyone going it alone. There are thousands of tax rule and rate changes every year, which means even the best laid plans can't mitigate the risk of noncompliance.

So, if you've been tasked with ensuring compliance for a growing business, it's time to talk to Avalara about additional opportunities to decrease your risk and operate more efficiently. We work with more than 600 partners to provide certified integrations that work seamlessly with the financial systems our customers use every day. We love taxes and would love to make you a compliance champion.

We really believe that management of all transaction taxes will inevitably be automated. Tens of thousands of customers like you have already chosen to accelerate that inevitability with Avalara. We're honored by the opportunity to work with you and want to help you stay ahead of your growing business needs.

Thank you,

A handwritten signature in blue ink that reads "Scott McFarlane". The signature is fluid and cursive, with a long horizontal stroke at the end.

Scott McFarlane  
CEO, Avalara

# AVALARA TAX COMPLIANCE SUITE

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## AVALARA TAX COMPLIANCE SUITE

Avalara helps businesses get tax compliance right. Our customers face demanding tax obligations imposed by state, local, and other tax authorities around the world, and rely on Avalara for efficient and more accurate solutions to manage those requirements. Avalara offers solutions for various transaction taxes, including sales and use, VAT, excise, communications, and others. The suite enables you to calculate taxes, file and remit returns, and comply with document management requirements. In today's fully digital, omnichannel world, you need a fix that works seamlessly with all of your business systems to provide a complete end-to-end solution. With hundreds of certified integrations for accounting systems, ERP and CRM providers, and ecommerce software as well as professional services and training support, Avalara is here to help you get the most out of your solution so you can get it right.

# TAX COMPLIANCE THAT SPANS YOUR ENTIRE BUSINESS



You require multiple systems to run your business...



ERP



Ecommerce



POS



CRM



Mobile pay

...and that results in a lot of tax headaches

Sales growth increases business complexity

Business applications lack tax compliance

Manual solutions are costly and error prone

Inaccuracies result in customer dissatisfaction

Ever-changing and more complex tax rules

Increased collection efforts by governments

Avalara connects with 600+ system integrations and flexible API



## Avalara Tax compliance suite



Tax calculation



Tax returns



Tax document management

- Sales and use tax calculation
- VAT, India GST, and Brazil calculation
- Excise tax calculation
- Lodging and occupancy tax calculation
- Communications tax calculation
- Cross border calculation (custom duties and import taxes)

- Sales and use tax returns
- VAT, India GST, and Brazil returns
- Excise returns
- Lodging and occupancy returns
- Communications tax returns

- Exemption certificate management
- Excise document management
- W-8/W-9 management

### Professional services, support, and customer success

Avalara provides customers with a wide variety of support and ongoing training resources

Total Tax



Compliance



Across every layer of government

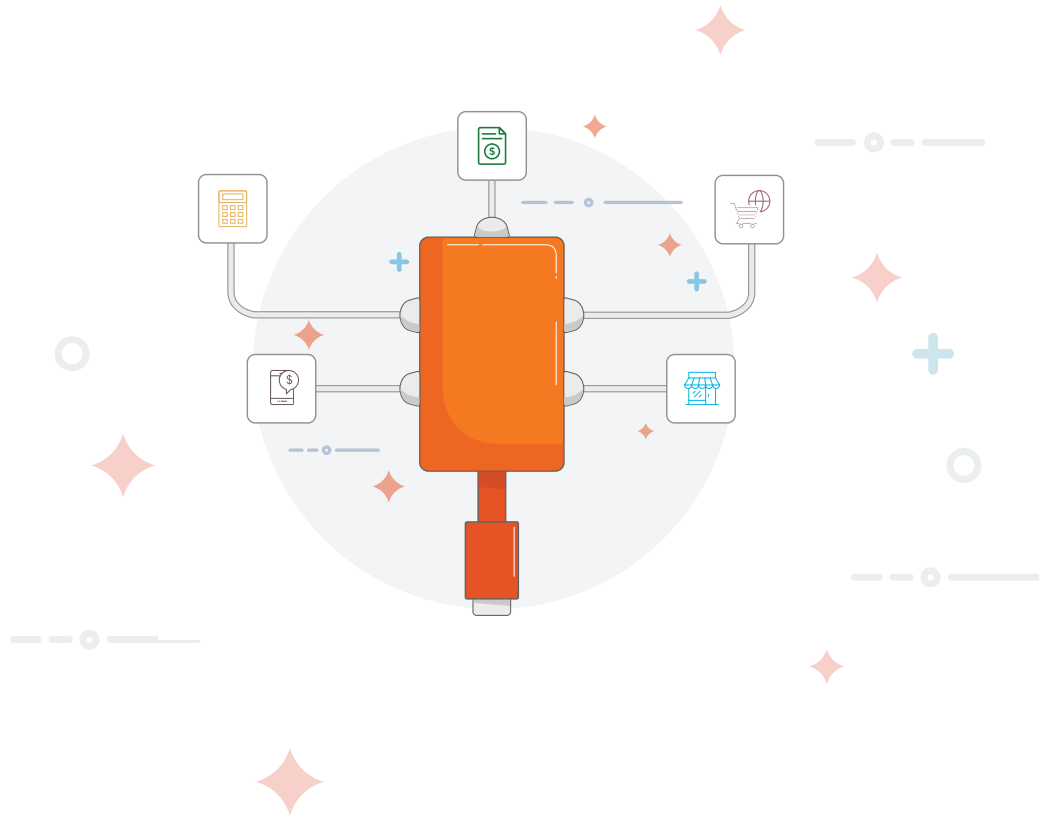
Local

City

County

Federal

International



## CERTIFIED INTEGRATIONS

AvaTax integrates seamlessly with 600+ prebuilt connections into accounting systems, ERP and CRM providers, and ecommerce platforms. Having an automated end-to-end solution for all areas of your business not only keeps your company compliant – it provides piece of mind knowing that all areas of sales tax compliance are taken care of for you.

### Ecommerce

Avalara has integrations with many software providers that makes ecommerce sales tax calculation a snap.

### Accounting

Avalara offers connections to hundreds of accounting platforms, making for fast, seamless, and reliable sales tax calculation.

### CRM

Avalara can automatically provide sales tax on customer quotes and invoices, saving you time and increasing customer satisfaction.



### Billing and Recurring Payments

Avalara integrates with hundreds of billing payment applications, helping you to manage the lifecycle of sales documents from pre-sale through receipt issuance.



### Retail / POS / Mobile (mPOS)

Avalara calculates tax within popular retail, point-of-sale (POS), or mobile POS systems, enabling more accurate rates and product taxability.

### ERP

Avalara provides tax calculation for all areas of your business as well as regularly updated rates and product taxability.



For more information on available connectors for your software solutions, contact your Avalara Account Manager.



## TAX CALCULATION

Based on the most current sales and use tax data, manage compliance with automated tax calculation from Avalara. With Avalara, you get a full end-to-end solution that combines robust tax calculation capabilities with returns filing and remittance, and simplified document management collection and storage. Get tax compliance right with Avalara.



## Avalara AvaTax

### Sales and use tax calculation

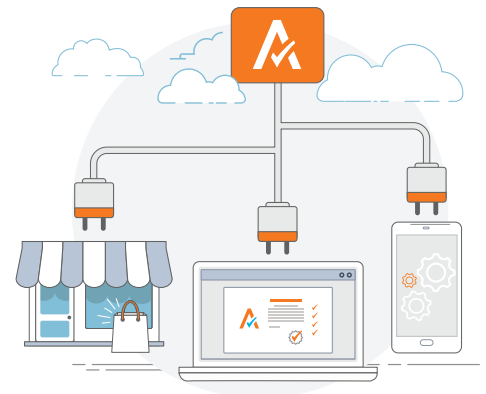
Sales and use tax is compulsory, complex, and costly for any business. Automating the process with Avalara AvaTax helps businesses calculate sales and use taxes based on regularly updated tax rates and rules. AvaTax calculates rates across 12,000+ sales tax jurisdictions at the point of transaction. Further, AvaTax works seamlessly through more than 600 integrations with the most commonly used business applications including ERP, POS, ecommerce, billing, and CRM, to support quick deployment. Spend more time growing your business and less time worrying about compliance.

### Cross-border calculation (custom duties, import and export taxes)

The internet has blown open the world of global commerce, making it accessible to small and midsize ecommerce merchants in a previously unimaginable way. But the intricacies of global tax compliance can be daunting. Cross-border sales are riddled with complex taxes, duties, shipping costs, and fees, making the landed cost of goods difficult to decipher. Avalara can enable merchants of all sizes to calculate the final cost of global commerce transactions. Your customers won't be dismayed by hidden costs, and you'll be free to focus on managing and growing your business.

### VAT, India GST, and Brazil calculation

When you begin selling overseas, tax compliance becomes more complex. Avalara offers a variety of solutions for businesses located in various countries around the world, and companies doing business globally: from complete European VAT solutions to full compliance in Brazil and from GST in India to cross-border commerce. We're continuously expanding our international capabilities and growing our portfolio of international solutions.



## AvaTax for Communications

### Communications tax calculation

Avalara provides tax calculation and tracks ever-changing rules and rates to help communications professionals manage tax compliance complexities. With an entire team dedicated to helping you reduce risk, Avalara understands the complexities of communications taxes. AvaTax for Communications can connect directly to many billing or ERP systems for quick and more accurate calculations in thousands of global taxing jurisdictions, easily managing intricacies like bundles, tax on tax, steps and brackets, and more.

## AvaTax Excise

### **Excise tax calculation**

Energy tax calculation is challenging. Tax rules, rates, and forms change frequently and are difficult to track across multiple jurisdictions, products, and tax types. AvaTax Excise provides you with real-time identification and calculation of excise and value-based taxes for financial transactions involving petroleum products.



## Avalara MyLodgeTax

### **Occupancy tax calculation**

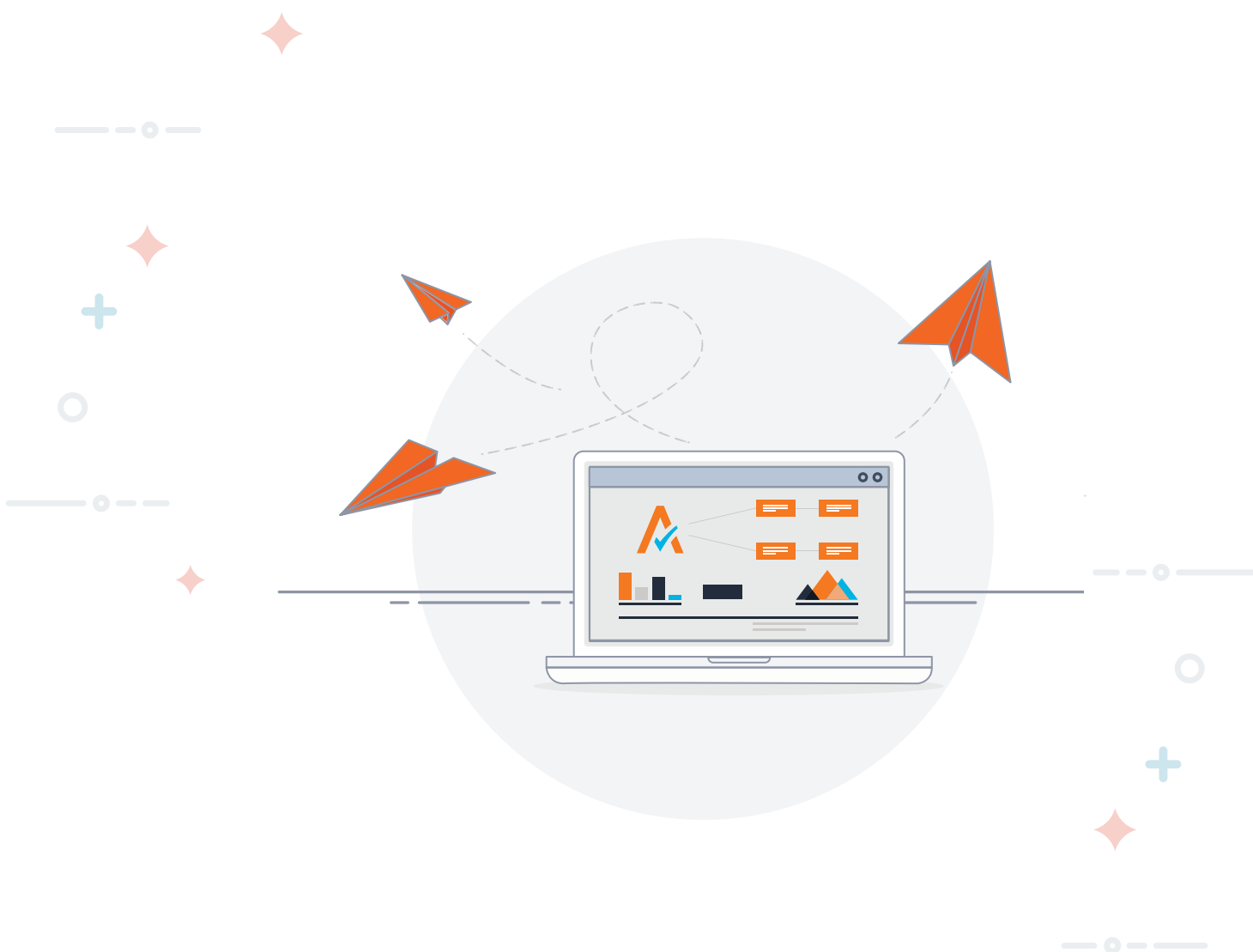
The internet has revolutionized the travel industry, making it easier than ever for travelers to find and compare lodging choices. Guests expect perfection from quote to checkout. Avalara's end-to-end occupancy tax solutions work for hotels, motels, property owners, managers, and Airbnb hosts. Our solutions save time, increase compliance, and minimize audit risk for all lodging providers, whether you're booking hotel rooms or managing a vacation rental property. Take the pain out of occupancy tax compliance with Avalara.

## Avalara MatrixMaster

### **Tax calculation for Universal Product Codes (UPC)**

Avalara MatrixMaster makes tracking product taxability easy with a powerful database of more than 10 million codes. Using UPCs, commonly known as bar codes, MatrixMaster determines taxability information for millions of products in thousands of tax jurisdictions across the United States. MatrixMaster works for any business that sells products identified with alpha or numeric codes, enabling businesses to process large volumes of products in any file layout for product taxability determinations.

Contact your Avalara Account Manager for more information on our sales and use tax calculation solutions.



## TAX RETURNS

Streamline your process with automated returns preparation, filing, and remittance from Avalara. With Avalara, businesses of all sizes and around the world get a full end-to-end solution that combines returns filing and remittance with up-to-date tax calculation and simplified document management collection and storage. For customers interested in fully managed solutions for filing and remittance, please refer to our Managed Service offerings. Get tax compliance right with Avalara.

## Avalara Returns

### Sales and use tax returns

Filing sales tax returns and remitting payments is complicated; Avalara Returns helps you streamline the process from end to end. Returns uses transaction data from your ecommerce or accounting platform to seamlessly prepare all your returns in minutes – paper or electronic. Submit a single payment to Avalara via ACH transfer for your entire tax liability. Improve efficiency and manage compliance by using Returns for your monthly sales and use tax filing, remittance, and notice management.

### Streamlined Sales Tax (SST)

If your company has nexus in one or more of the SST states due to unrelated property or employees, you can file SST returns with Avalara. Avalara is a Streamlined Sales and Use Tax Certified Service Provider (CSP). A CSP allows businesses participating in SST to fully outsource their sales and use tax management processes. And by registering for SST, a business is eligible to use CSP services for free.

### VAT, India GST, and Brazil returns

Avalara Managed Returns for VAT, India GST, or Brazil completes and files your global returns, using Avalara’s powerful global reporting software used for thousands of filings around the world.



## Returns Excise

### Excise returns

Returns Excise generates energy tax returns from transaction data that are signature-ready, enabling distributors, terminal operators, energy traders, suppliers, fleets, and retailers to automate the filing process. Returns Excise seamlessly imports and transforms data from your back-office systems that track energy transactions. Using customizable rules that embody local, state, and federal tax laws, Returns Excise determines your applicable taxes, generating schedules and returns for all major reporting jurisdictions in the United States and Canada.

### ◆ Returns Excise Pro

#### Sales and use tax returns for excise

In addition to filing excise tax returns, businesses also need to file sales and use tax returns, sometimes on the same transactions. Instead of two separate filing processes and tools, Avalara can support sales and use returns within the Returns Excise Pro service.

## Returns MyLodgeTax

### Occupancy tax returns

In addition to determining and collecting your lodging and occupancy taxes, our automated returns solution will prepare, file, and remit any lodging tax return in the United States. This includes any sales and lodging return required to remit the full liability on any tax in any state, county, or city. Our lodging solution is a more accurate and efficient way to deal with hotel occupancy tax compliance.

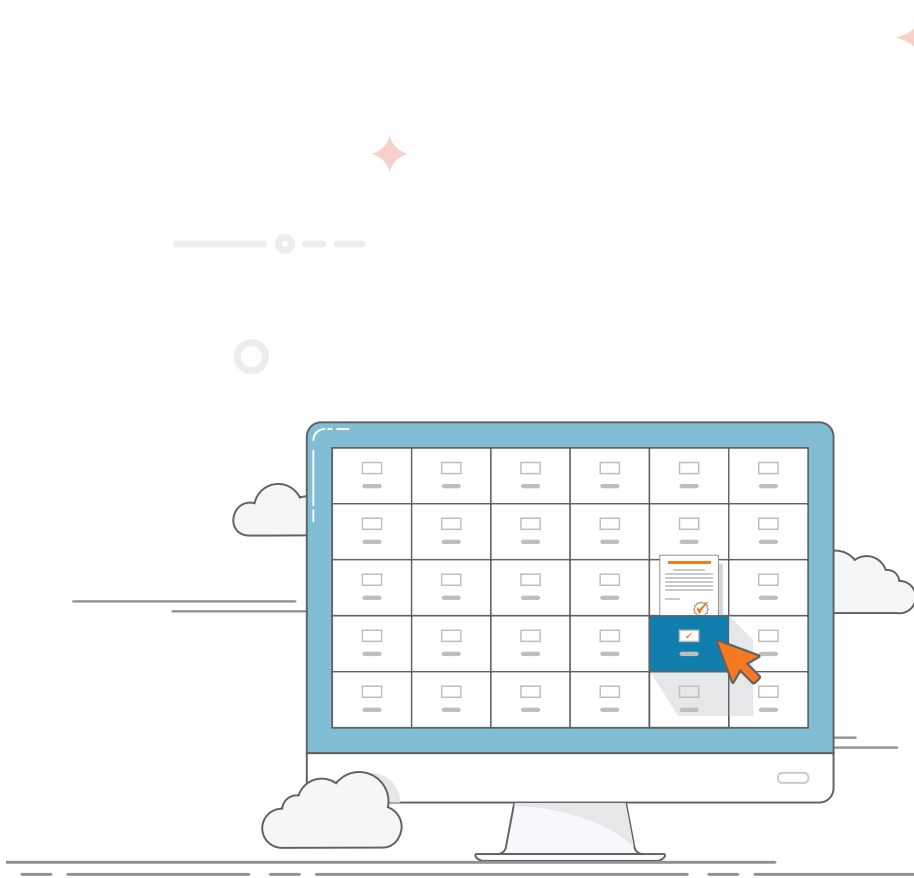
## Returns for Communications

### Communications tax returns

Beyond automating your communications tax calculation, Returns for Communications acts as your highly efficient, full-service communication taxes solution. Our managed service paired with an online portal consolidates tax compliance management into a seamless, central solution.



Contact your Avalara Account Manager for more information on our sales and use tax calculation solutions.



## TAX DOCUMENT MANAGEMENT

Minimize audit risks and penalties with a complete tax document management solution from Avalara. With Avalara, you get a full end-to-end solution that combines seamless document management with up-to-date tax calculation and on-time filing and remittance for your returns. For customers interested in fully managed solutions for tax documentation, please refer to our Managed Services offerings. Get tax compliance right with Avalara.

## Avalara CertCapture

### Exemption certificate management

Avalara CertCapture is a highly scalable solution that collects, stores, tracks, reports on, analyzes, and utilizes exemption certificates to support sales and use tax compliance. Modules for retail and ecommerce let you efficiently collect certificates at the point of sale in store and online. CertCapture minimizes the risk of failed audits with centralized management of exemption certificates and also integrates with AvaTax and third-party applications to apply exemption certificate information to sales tax calculation.

## ◆ AvaTax Exemption

### Exemption certificate management within AvaTax

AvaTax Exemption helps businesses collect, store, track, and utilize exemption certificates. AvaTax Exemption is an add-on service within AvaTax to apply exemption certificate information to sales tax calculation.



## Avalara ExciseCapture

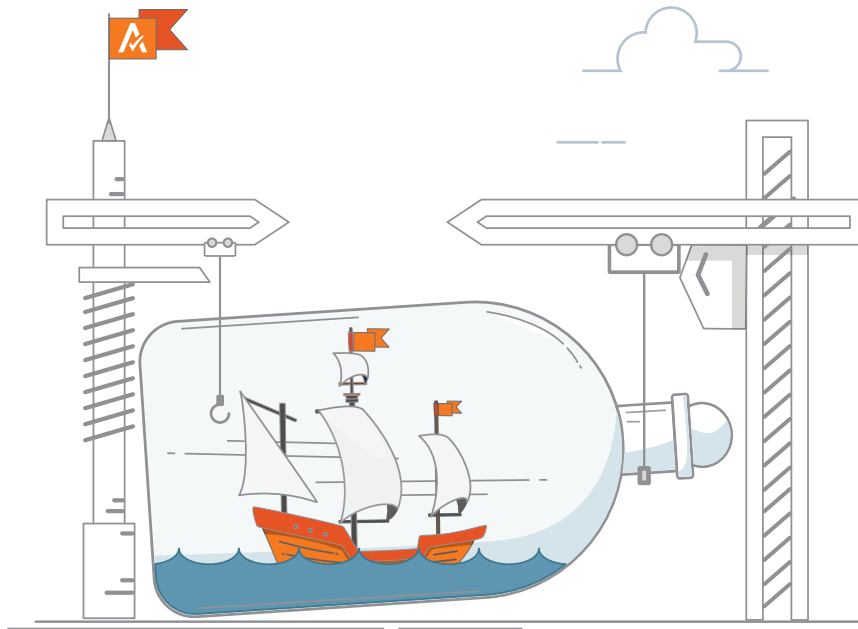
### Excise document management

ExciseCapture manages fuel licenses and exemption certificates, keeping them up to date and in the background. With ExciseCapture, customers can enter their own information directly into your secure system, eliminating the need for soliciting, collecting, and transcribing hundreds (or thousands) of these documents.

## Avalara VendorCapture

### W-8 and W-9 management

Companies continue to increase the use of temporary or contract employees, and as a result their W-8 and W-9 responsibilities continue to grow. VendorCapture helps you reduce the complexity of obtaining your W-8 and W-9 forms, validating Tax Identification Numbers (TINs), and minimizing your organization's exposure to B Notices.



## PROFESSIONAL SERVICES






As a leader in sales tax automation and other compliance software solutions, Avalara offers Professional Services including Tax Advisory Services, Implementation Services, Managed Services, and Support Plans and Training to help customers prepare for and achieve compliance with a variety of options. For some businesses, our tax calculation, filing remittance, and document management solutions are simple to set up, but for others, additional help may be required to support your implementation, as well as ongoing compliance monitoring, maintenance, and training.



## TAX ADVISORY SERVICES

### Professional services to set up, monitor, and maintain sales and use tax compliance

The Avalara Tax Advisory Services team, along with our partners, provides a range of services to both new and existing customers at every stage of the tax compliance cycle.

 <p><b>Avalara Nexus Study</b> identifies where customers have created a tax registration and reporting requirement based on business activities in a taxing jurisdiction.</p>	 <p><b>Voluntary Compliance Services</b> include assistance with Voluntary Disclosure Agreements (VDAs), amnesty programs, and historical tax registrations requiring disclosure of prior activities.</p>
 <p><b>Avalara Tax Registration</b> includes standard tax registration, deregistration, and name and address change notification.</p>	 <p><b>Avalara Backfiling Services</b> include preparation and submission of prior period unfiled or amended returns, along with a request for penalties and interest abatement.</p>
 <p><b>Avalara Nexus Monitoring Service</b> includes helping customers understand changes to nexus position and tax policy, and monitor new business activities in unregistered jurisdictions.</p>	 <p><b>Customer Tax Recovery Services</b> typically part of Voluntary Compliance Services, help customers secure exemption and resale certificates – or affidavits of use tax paid – covering historical transactions that were not taxed.</p>



Talk to your account manager about other tax advisory services you may need. If Avalara can't help you with any area of concern, we can introduce you to an expert through our Partner network.

## IMPLEMENTATION SERVICES

### Experts to help implement your Avalara solution

While Avalara does everything possible to make the implementation and use of AvaTax as easy as possible, each business has unique tax policies, business processes, and ERP or ecommerce systems for which AvaTax needs to be set up. You can choose to implement our solutions on your own, or leverage our implementation team. Our team will guide you through the implementation process, including tax code mapping, which provides expert assistance with recommended product and service mapping to the AvaTax system tax codes.

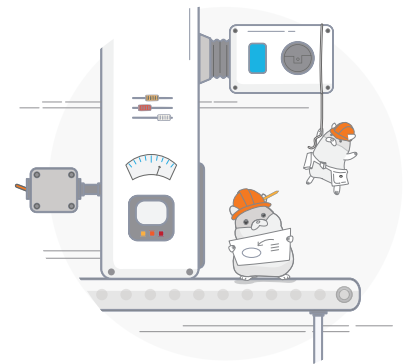
## MANAGED SERVICES

### Full-service returns filing and document management

Avalara can help you manage expanding returns and document management requirements with our managed services. We can work on your behalf to file and remit returns as well as collect and validate exemption certificates and vendor forms.

## TRAINING AND SUPPORT

Avalara University provides online and classroom training for customers interested in learning more about product features and functionality. You can even earn CPE credits for some classes while understanding how to get the most from your AvaTax, Returns, or CertCapture investment. Customers can also leverage the Avalara Help Center to self-assess and find answers to the most common questions about or scenarios involving our products. These resources are available online and on-demand for all customers.



## SUPPORT PLANS

The Avalara Help Center is available to customers 24/7, but if you're a customer in need of additional support, we have a plan to suit you. Our Avalara Support Plans offer varying levels of product support based on your specific requirements. In addition to the support plan options, customers can purchase additional hourly support to assist with implementation or to help address individual needs.

### Standard Support

Standard Support is intended for customers that prefer a self-serve model to implement AvaTax on their own. With Standard Support, you have access to our many self-serve resources, including online tutorials, documentation, and Avalara expert videos. Customer Support is available for questions.

### Standard Support Plus

Standard Support Plus is for customers looking for a self-serve model with additional guidance during implementation. An Implementation Specialist is assigned to provide general guidance, and you have full access to all self-serve resources, including online tutorials, documentation, and Avalara expert videos and are eligible for discounts on Avalara Sandbox environments.

### Business Support

Business Support provides customers with tailored implementation support. An Implementation Specialist will provide a custom implementation plan to enable you and your team to successfully implement your Avalara software. Subject matter experts for product taxability and tax compliance will be engaged as necessary to provide a complete implementation support plan to get up and running with Avalara. Customers are also eligible for greater discounts on Avalara Sandbox environments. In addition, Business Support includes an Avalara Returns assessment to help identify areas for improvement within your filing and remittance process.

### Enterprise Support

Enterprise Support is our most robust support option, customers are assigned a Senior Implementation Specialist during implementation and a Technical Account Manager once AvaTax implementation is complete. Your Senior Implementation Specialist will provide a custom implementation plan to enable you and your team to successfully implement your Avalara software. Subject matter experts for product taxability and tax compliance can be engaged as necessary to provide a complete implementation support plan for you and your team to execute with confidence. Enterprise Support plan customers receive a complimentary Avalara Sandbox environment for testing as well as an Avalara Returns assessment to help identify areas for improvement within your filing and remittance process.

### Returns Setup

Avalara also provides various support plans to assist with the initial setup of Avalara Returns. There are three levels of Returns support plans – Standard, Business, and Enterprise – based on the number of returns and locations required by the customer. This service includes setting up a company profile, configuring nexus and locations settings within AvaTax, and creating individual filing calendars.



Contact your Avalara Account Manager to learn more about Avalara Support Plans.

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# Avalara

Tax compliance done right



[www.avalara.com](http://www.avalara.com)