



# ControlPoint™

## Exemption Certificate Management for Retailers

Redefine your exemption certificate management process using ControlPoint™ software to enable collection of exemption certificates at point of sale (POS) with centralized certificate validation. You will achieve compliance and reduce audit risk, while providing customers with convenience and a better experience in your stores.

### ***Retailers face specific challenges to achieve exemption certificate compliance.***

- Customers would like the convenience of making repeat tax-exempt purchases at retail locations or claiming tax exemptions when making online purchases.
- Tax department resources face an enormous task to collect exemption documents from multiple retail locations and easily reconcile them to sales transactions.
- Retailers cannot reliably expect store employees with minimal training to make sensitive decisions to accept or reject exemption certificates for purchase.
- Exemption certificate errors can be costly in the case of an audit.



### ***Point of Sale***

Accept exemption certificates at POS and digitally associate the certificate and customer to the transaction.

- Accept exemption certificates for tax-exempt purchases at POS.
- Allow customers to submit certificates to ControlPoint's centralized repository from any mobile device.
- Scan and associate the exemption certificates' unique barcode identifiers with sales in your POS system.
- Use ControlPoint's robust reporting to query, retrieve, and extract certificates with barcodes to respond to audit requests.



Industry-leading mobile application



Fully integrated with e-commerce systems



Seamless touchpoint for customers and end users



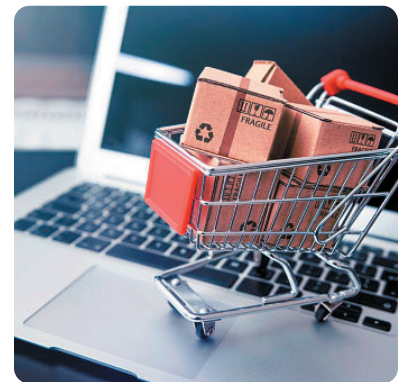
Flexible, centralized reporting solution

## Customer Portal Management



Liberate tax resources from document collection efforts and have your customers submit their forms directly to ControlPoint after registering in the end-user portal.

- Allow your retail customers to register in the ControlPoint end-user portal and independently submit exemption certificates for review.
- Customers can fill out exemption forms online using the guided wizard or scan and upload previously completed and signed forms.
- Customers can present their certificate barcode to make repeat tax-exempt purchases in your stores without resubmitting their certificates.
- Customers can retrieve certificate barcodes for scanning at checkout using their mobile devices at any time.
- Easily send follow-up requests to customers with rejected or expired documentation directly from ControlPoint.
- Associate tax-exempt sales to certificate barcodes in your POS system and produce audit reports from ControlPoint.



## E-commerce



Streamline the e-commerce tax-exempt shopping cart process by collecting customers' exemption certificates online.

- Prompt customers claiming tax exemptions to upload or complete exemption forms during checkout using ControlPoint's form submit wizard.
- Exemption portal can seamlessly be accessed and feel native to your corporate site.
- Save time by reducing customer calls to the tax department to request tax-exempt treatment on online transactions.
- Eliminate costs to credit and rebill customer invoices when exemption certificates are presented after the fact.

## About Ryan

Ryan, an award-winning global tax services and software provider, is the largest Firm in the world dedicated exclusively to business taxes. With global headquarters in Dallas, Texas, the Firm provides an integrated suite of federal, state, local, and international tax services on a multijurisdictional basis, including tax recovery, consulting, advocacy, compliance, and technology services. Ryan is a nine-time recipient of the International Service Excellence Award from the Customer Service Institute of America (CSIA) for its commitment to world-class client service. Empowered by the dynamic *myRyan* work environment, which is widely recognized as the most innovative in the tax services industry, Ryan's multidisciplinary team of more than 3,000 professionals and associates serves over 18,000 clients in more than 60 countries, including many of the world's most prominent Global 5000 companies.



### Award-Winning Tax Services

For additional information

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