

Streamlined Exemption Certificate Migration and Ongoing Compliance for Major Manufacturer



CLIENT

National Manufacturer



INDUSTRY

Industrial
Manufacturing



OUR ROLE

State & Local Tax
Sales & Use Tax
CFO Advisory
Technology Advisory

A national manufacturer with thousands of exempt customers successfully transitioned to a new Avalara instance following a corporate carve-out from its parent organization.

Following the sale of a major business unit, a national manufacturer needed to replicate its Avalara tax automation environment to support the remaining organization. This required a full rebuild of the Avalara configuration, including:

- ▶ Collection and tax type setup
- ▶ Tax code mapping
- ▶ Exempt customer records
- ▶ Returns configuration
- ▶ Importation and linking of over 90,000 exemption certificates (PDFs, Word documents and other uploaded files)

Because Avalara does not offer functionality to transfer certificate images or remap customer relationships between instances, the manufacturer faced the prospect of manually validating and attaching over 90,000 certificates, an expensive, time consuming, and error prone task. Recognizing the need for both compliance accuracy and technological efficiency, the manufacturer partnered with Cherry Bekaert (the Firm).

Eliminating Manual Certificate Handling

Cherry Bekaert's Sales Tax team collaborated closely with the Firm's CFOA: Technology Advisory practice to engineer a solution that eliminated the need for manual certificate handling.

The Technology Advisory team utilized a customized tool that:

- ▶ Extracted certificate images from the original Avalara instance
- ▶ Mapped and merged each certificate to the correct exempt customer record
- ▶ Validated data integrity without requiring individual certificate review
- ▶ Prepared the new Avalara environment for immediate use

This automated approach replaced what would have required extensive manual effort, saving the manufacturer well over \$75,000 in labor and preventing operational delays. It also helped mitigate potential compliance risk, as many certificates related to historical client activity tied to filing obligations the manufacturer still retained.

The Results: Successful Migration Without Disruption

With the Avalara system successfully replicated, the manufacturer resumed normal operations without disruption and with full confidence in the accuracy of its exemption data. Our professionals enabled a rapid and accurate migration of exemption certificates that Avalara's native tools cannot perform. The manufacturer is fully operational in its new Avalara instance, with complete exemption mapping and tax configuration already in place.

Following the implementation, Cherry Bekaert now manages the organization's ongoing exemption certificate compliance, including:

- ▶ Monitoring the manufacturer's sales tax inbox
- ▶ Reviewing and validating newly received certificates
- ▶ Coordinating with the sales team and customers
- ▶ Maintaining exemption records to support audit readiness

The manufacturer continues to express strong satisfaction with both the migration process and the ongoing compliance management provided by the Cherry Bekaert team.

Your Guide Forward

Cherry Bekaert's Sales & Use Tax and CFOA: Technology Advisory teams help organizations address complex indirect tax and technology integration challenges across the full compliance lifecycle. Whether migrating exemption certificates, implementing tax automation solutions, or managing ongoing compliance, our professionals support streamlined processes, reduced risk and audit readiness.



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About Cherry Bekaert

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