Using CertCapture

Last Modified on 04/23/2025 11:56 am EDT

> This guide explains how to utilize CertCapture. It is intended for advanced users.

After the system administrator configures the CertCapture integration, it is relatively seamless for end users. It can affect orders and invoices for tax exempt customers.

Companies

[First follow these steps](https://aace6.knowledgeowl.com/help/flagging-companies-as-tax-exempt) (https://aace6.knowledgeowl.com/help/flagging-companies-as-tax-exempt) to flag a Company record as tax exempt. If you do not have all of the customer's exemption information, you can still flag the record as tax exempt by populating *either* Exemption Number *or* Exemption Code. This will feed the customer into the CertCapture workflow outlined below.

Customers using ECM can leave the Entity Use Code blank because Avalara will look to the certificate on file in ECM for exempting the transactions.

Note: This setting is located within your Avalara account and cannot be changed from within aACE. For questions regarding this or other Avalara account preferences, please contact your Avalara representative.

If you have a PDF of the exemption certificate, follow these steps to upload it to aACE:

1. Click the Paperclip (📎) icon in the **Cert** field and upload the exemption certificate PDF file.
2. Enter the date the certificate was signed in the **Cert Signed** field.
3. Enter the certificate's expiration date in the **Cert Exp Date** field.
4. Enter the state that issued the certificate in the **Ex State** field.
5. Click **Save**.

The exemption certificate will now be stored in aACE. It can be viewed and printed at any time by clicking the Paperclip (📎) icon.

To ensure that CertCapture can contact the customer in the event that their certificate expires or is deemed invalid, make sure that there is a valid A/P email address associated with the Company record:

1. Navigate to the record's **Customer Details** tab.
2. Click **Edit**.

3. Enter a valid email address for the company in the **Email** field.
4. Click **Save**.

The first time an order is entered for a tax exempt company in aACE, a customer card will be created in CertCapture with the customer's name, address, number of active certificates, and the customer's ID number and company code. If that data is updated in aACE, the changes will be synced in CertCapture the next time an order is entered for that customer.

Orders

When an order is created for a company that is flagged as tax exempt, aACE will query CertCapture for the customer's certificate status and whether there is a valid exemption certificate on file.

In the case of a new customer or a customer whose certificate is missing or expired, the user will be prompted to send the company a request for an updated certificate.
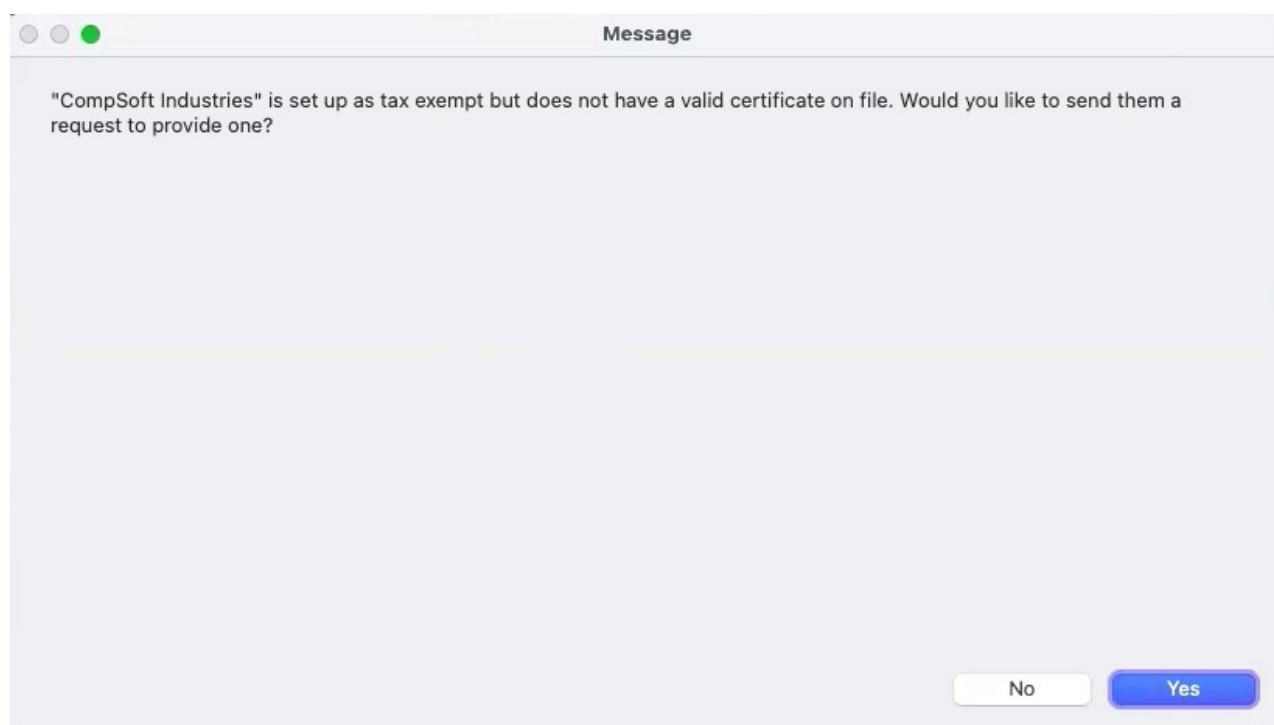
Clicking **Yes** will send an email to the email address on file in the Company record. The email will contain a link where the customer can upload their exemption certificate. They will also be prompted to fill in details such as the region it applies to, the organization's tax ID number, the reason for the exemption, the effective date, the expiration date, and whether or not it is a single-use certificate.

When the customer uploads their certificate, it will be downloaded into aACE when their

order is updated, along with the following data: Ex Code, Exemption No, Cert Signed, Cert Exp Date, and Ex State.

Exemption Certificate Handling Preferences

If you experience changes to your CertCapture workflow, check the Exemption Certificate Handling preferences set in your Avalara account. These settings determine whether CertCapture uses data contained in the invoice, the exemption certificate, or both when exempting transactions. Any time changes are made to the Exemption Certificate Handling configuration, your exemption workflow may need to be reviewed.