



ControlPoint™

ControlPoint™ provides complete control over your exemption certificates to improve tax compliance and reduce audit exposure.

ControlPoint™ is a robust central repository for managing and sharing purchase and/or sales exemption certificates, substantially mitigating audit exposure for missing or incomplete documentation while dramatically improving the efficiency and effectiveness of the tax department. ControlPoint™ can be hosted by Ryan or deployed locally, and is ideal for firms of any size that have a need for exemption certificate management in a secure, flexible, easy-to-use software application. The system provides many ways to send and receive certificates, ensuring that your records are complete, and substantial savings from the elimination of unnecessary penalties and interest due to missing certificates are realized.

Award-Winning Tax Services

For additional information
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The benefits and key features of ControlPoint™ include:

- **Centralized access to your critical information:**
A centralized repository for all of your certificate documentation accessible through your web browser, with summary data concerning the overall health of users' exemption certificate compliance viewed from a central dashboard.
- **Control over your certificate data:**
The ability to track all relevant information about users' exemption certificates, including expiration dates, blanket vs. one-time use, and more.
- **Validation of your customer certificates:**
A robust set of validation tools for reviewing certificates and validating them against checklists, as well as the format of the certificate numbers on a jurisdiction-by-jurisdiction basis.
- **Unparalleled communication capabilities:**
A powerful, customizable correspondence engine that can send off batch emails or physical letters to your customers and vendors to proactively manage your exemption certificates, automatically sending out requests for certificates that are deficient, expired, or near expiration.
- **Integrations to other systems:**
Web services support that facilitates communication with integrated Enterprise Resource Planning (ERP) systems and/or third-party tax engines, automatically eliminating double-key entries and ensuring system synchronization.
- **Reporting to assist you with your analysis and compliance activities:**
Robust reporting that summarizes the status of all customers, vendors, certificates, and data to keep you compliant. The ability to quickly produce materials for auditors—tailored to their data requests.
- **Vendor-side functionality:**
Vendor/purchase certificate generation and management utilizing a vast library of forms.
- **Easy access to critical information:**
Quick and easy links to customer or sales certificates, with the ability to request and receive certificates from customers, including the ability to have customers sign certificates online and submit them back in real time.

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