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This sidebar article accompanied the *August 2009 Review of [Sales & Use Tax Programs](#)*

ISSI Offers Options for Automated Exemption Certificate Management

Keeping up with ever-changing sales and use taxes is hard work enough, but for many mid-sized and growing businesses, the process of tracking and managing exemption certificates is an added burden that can zap staff time and result in costly penalties when errors occur. And with manual management of these certificates, mistakes are inevitable.

Fortunately, these businesses have options from Imaging Science & Services (ISSI) that can help automate these tasks, providing support for all processes, including acquisition, validation, management, and production of certificates and all related documents.

TEAMS Express

The technology vendor's flagship system, TEAMS Express (Tax Exemption Administrative Management Systems), is a web-based program that helps streamline the entire process of exemption certificate management, enabling e-mail and fax acquisition, mass and individual customer requests, and customer portals that let users log into the on-demand system to verify their own exemption certificate information. This allows a business to let their customers review forms pre-populated with their basic information, print the live document, sign it, and fax or email back to the business. They can also electronically sign the document and avoid the hassle of paper. Financial managers at the business can also complete exemption

certificates through the system, or can scan, index and review documents that

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be lost, renewals are automatically requested and no certificates go out of date. The system also offers a forms library that can be linked to the customer portal, allowing businesses running TEAMS Express to offer their small business clients a selection of sales and use tax forms relevant to where and how they do business. That is, each forms library is tailored for each customer.

LineLinkXL

For other document management functions, ISSI offers LineLinkXL, an add-in to Microsoft Excel that can turn a spreadsheet into a desktop document organizer. It can be used to access, organize and link documents in SQL databases, pull files from web-based applications, and lets users quickly scan-and-attach any type of source documents or files. Files linked to a spreadsheet using LineLinkXL can be easily shared with other users within the business, or even external users such as accountants and auditors, while maintaining document integrity. The program also has built-in utilities for burning data to disc or zipping files into compressed format for email use. LineLinkXL also links directly with TEAMS Express to provide a completely automated tool for responding to state sales tax audits by using the auditor's block sample request spreadsheet and tagging it up against the TEAMS Express database of certificates

Technology

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