

# VCERT® EXEMPTION CERTIFICATE TOOL QUICK REFERENCE GUIDE

## Why use it?

**It's your job.** It's your responsibility to make sure that customers who say they are exempt are actually exempt. You're not only required to ask for the exemption certificate – it's up to your company to make sure the certificate is valid. Why? Because it's against the law to allow customers to claim they are exempt without showing proof. The VCert Exemption Certificate Tool helps your company comply with state sales tax exemption laws – and saves your company money by avoiding sales tax penalties.

**It's customer-friendly.** With the Exemption Certificate Tool, you can create new exemption certificates for customers who don't have one, or easily find exemption certificates for customers who have already submitted one.

## How to find an exemption certificate

When a customer tells you he or she is exempt from paying sales tax, your first task is to work with the customer to find their exemption certificate. You can search for the customer's exemption certificate using a variety of inputs.

1. Log in, if you haven't already. Enter the following url in your web browser: [provided by company]
2. Click **Login**, then enter your user name and password.  
This displays the welcome screen for your store.
3. In the **Look Up Exemption Certificates** box, select the search criteria your customer wants to use.



Look Up Exemption Certificates

Charity Inc. Search

Search on:

- Business / Customer Name
- Signer Name
- Phone (xxx-xxx-xxxx)
- Email
- Certificate ID

4. Enter the information for the criteria you selected.
5. Click **Search**.

If there is a certificate on file matching the search criteria, vCert displays the customer or business name in the **Search Results** box at the bottom of the page.


Search Results for CA				
Business / Customer	Address 1	Address 2	City	Status
Charity Inc.	1234 Good Works Way		San Diego	Valid


- **If the status is Valid**, this means that the customer's certificate is up to date. Click the Business/Customer name in the list. This displays a summary page about the certificate, including the Certificate ID.

**Exemption Certificate Summary**

<b>Customer Information:</b>	<b>Certificate Information:</b>	
<b>Business/Customer:</b> Charity Inc.	<b>Status:</b> Valid	<input type="button" value="Renew Certificate"/>
<b>Address:</b> 1234 Good Works Way, San Diego, CA, 92106	<b>Expires:</b> 6/18/08	<input type="button" value="Print Certificate"/>
<b>Signer:</b> Michael Jones		

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**Certificate ID:**   ← Copy icon


If your POS system is on the same computer, click the **Copy**  icon and paste the Certificate ID into the appropriate area. If you need to record the Certificate ID on another computer, print the certificate or write down the Certificate ID so you can record it later. When you click **Print Certificate**, vCert displays the certificate in an Adobe PDF. Click the **Print** icon or right click in the PDF and click **Print** in the menu. **You are done!**

- **If the status is Invalid or Expired**, the customer needs to update or renew the certificate. Click the Business/Customer name in the list. In the **Exemption Certificate Summary**, click **Renew Certificate**.

**Exemption Certificate Summary**

<b>Customer Information:</b>	<b>Certificate Information:</b>	
<b>Business/Customer:</b> ABC Corporation	<b>Status:</b> Invalid	<input type="button" value="Renew Certificate"/>
<b>Address:</b> 123 ABC Way, San Diego, CA, 92106	<b>Expires:</b> None	<input type="button" value="Print Certificate"/>
<b>Signer:</b> George C. Smith		

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**Certificate ID:**  

- **If there is no certificate on file**, the customer needs to create a new Exemption Certificate. Click **Exemption Certificate Wizard** under **Create New Exemption Certificate**.

**Create New Exemption Certificate**

Use if the customer does not have any exemption certificate in the search results

6. If you're renewing a certificate or creating a new certificate, follow the steps in the wizard.
7. If you get to the end of the wizard and vCert doesn't find the correct form, you see a page like this:

**⚠ ATTENTION NEEDED!**

Based on your answers, we could not identify the appropriate form for the following state(s):  
 - **California**

This warning appears for one or more of the following reasons:  
 a) You indicated that your exemption reason was not listed.  
 b) The state(s) in question do not allow the selected exemption reason.  
 c) There is more than one certificate available that qualifies for the selected exemption reason.

**To resolve the missing form(s), choose from one of the following options:**

**1) (Preferred Option) Select your tax exemption form(s) manually from the following list:**

**Exemption Reason: Not For Resale > Exemption Reason Not Listed**  
**California**

CA Consolidated Certificate of Exemption	CALIFORNIA - CERTIFICATE OF EXEMPTION-MULTIJURISDICTION	<a href="#">Add to My Forms</a>
CA Direct Pay Permit	CALIFORNIA - DIRECT PAY PERMIT	<a href="#">Add to My Forms</a>
CA Sale to Indian Reservation	CALIFORNIA - SALE TO INDIAN RESERVATION	<a href="#">Add to My Forms</a>
CA Teleproduction Blanket Certificate	CALIFORNIA - TELEPRODUCTION BLANKET CERTIFICATE	<a href="#">Add to My Forms</a>

[Show Additional Forms](#)

**2) Use Miscellaneous Form** - Send us an exemption certificate you already have or any other documents you believe exempt you from sales or use tax. **Note: Selecting this form will deselect all other forms in the "My Forms" box and you will not be able to go back and select a different form.**  
[>> Misc Form](#)

**3) Exit Wizard** - No forms will be selected. As a result, you may not be sales or use tax exempt.  
[>> Exit](#)

If you cannot locate the appropriate form(s), [please let us know](#)

The customer needs to:

- Select a form from the list displayed
  - Select **Misc. Form** and provide their own exemption certificate or other information they believe will allow the exemption
  - Exit the wizard and not receive the sales tax exemption.
8. At the end of the wizard, the customer is prompted to sign the electronic signature pad.
  9. After the customer signs the certificate, print the certificate.
  10. Clicking **Continue** after printing the certificate displays the following page:

## Thank You!

Print this page if you would like a record of your Certificate IDs for this vendor.

[Print This Page](#)

**Signer Name:** George C. Smith  
**Business Name:** ABC Corporation  
**Date:** 06/18/2008  
**For Vendor:** Seed Org One

Certificate ID	Jurisdictions
CBRG	CA

[<< Back](#) [Finish & Exit](#)

11. You can print this page or record the Certificate ID so you can enter it into your POS system later. The Certificate ID is your proof that the customer has submitted an Exemption Certificate.
12. Clicking **Finish & Exit** closes the Wizard window and returns you to vCert Retail.

### 13. MAKE SURE TO ENTER THE CERTIFICATE ID INTO THE POINT OF SALE SYSTEM!

## What happens after you enter the Certificate ID

Your company's tax department reviews the exemption certificates and either accepts or rejects the certificates. Rejection reasons include incomplete information, and an expired certificate.

**Note:** Customers returning to your store after their certificate is rejected are required to renew the certificate before they can get a sale tax exemption.

## Troubleshooting

**The Wizard or Clerk UI don't launch:** Reboot the system.

**The signature pad is not working:** Print the customer's exemption certificate, have them sign the form, then fax the form to the fax number on the cover sheet.

**A customer's certificate is valid one day, then invalid or expired the next:** This means that the tax department reviewed the customer's exemption certificate between the time you last checked and now. All certificates waiting to reviewed have a status of "pending," which shows up in the Search Results as Valid. When the tax department rejects a certificate, it shows up in the Search Results as "Invalid" or "Expired".