

# Simplifying Tax Exemption Management for High-Volume Enterprises

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## CASE STUDY

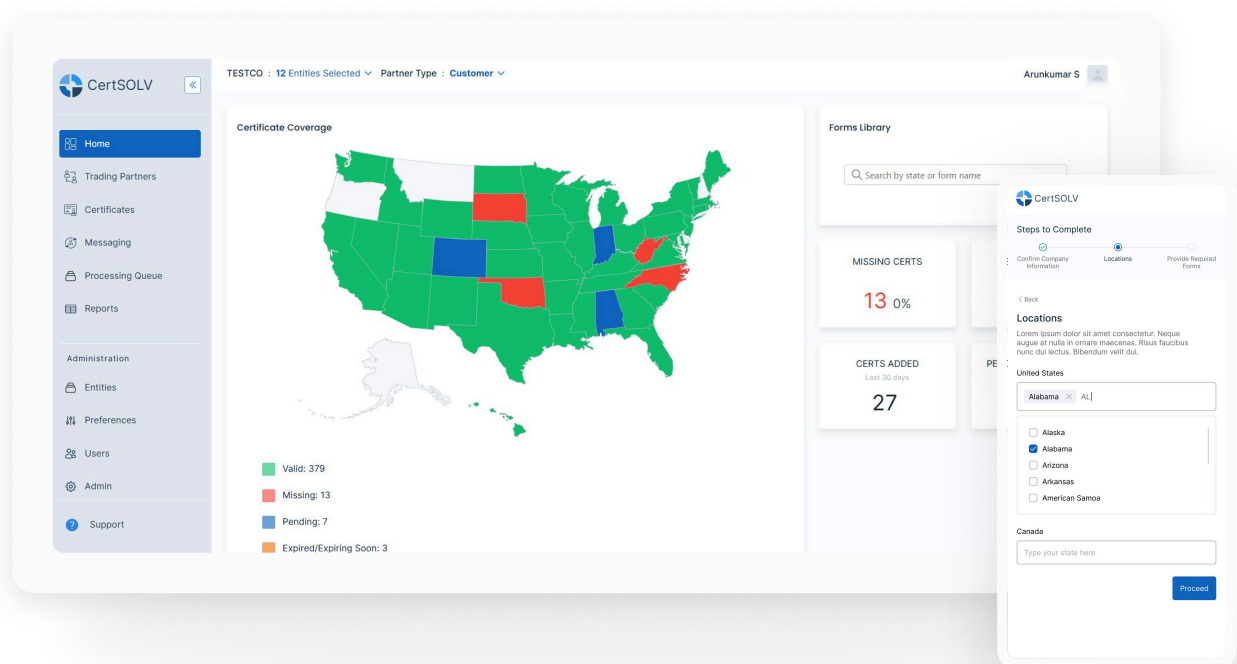
Fintech



# Overview

ActSolv, a trusted leader in sales and use tax compliance automation, offers powerful solutions to simplify the complexities of tax operations across diverse industries. Among its core offerings is CertSolv, a robust Tax Exemption Certificate Management Solution that automates the entire lifecycle of exemption certificate collection, validation, and compliance tracking.

Our company collaborated with ActSolv to further refine CertSolv's architecture and scalability, ensuring it efficiently supports enterprise clients handling thousands of tax exemption certificates across multiple states. Our goal was to enhance automation, accuracy, and compliance to help enterprises avoid costly audits and penalties.



# The Challenge

CertSolv was built to address a range of persistent and evolving tax exemption certificate management issues:

- **Multi-State Variability**

Each U.S. state enforces unique rules for exemption certificates, including variations in accepted formats, expiration periods, and required documentation, making standardization a significant challenge.

- **Frequent Legislative Changes**

With states regularly updating tax laws—especially in response to economic nexus regulations—keeping CertSolv consistently compliant required dynamic update mechanisms and rapid deployment capabilities.

- **Fraud & Invalid Certificates**

The risk of fraudulent, outdated, or incorrectly completed certificates posed serious audit risks for enterprises. CertSolv needed to automatically validate certificate authenticity and flag inconsistencies.

- **Customer Data Mismatches**

Certificates must exactly match customer records (name, address, tax ID) to be valid. Discrepancies often led to delays or rejections, requiring an intelligent validation and match engine.

- **High-Volume Transactions**

For clients handling thousands of transactions daily, the manual processing of exemption certificates was inefficient. CertSolv required powerful automation and bulk processing capabilities.



# Our Solution

We worked closely with ActSolv to enhance CertSolv with an advanced, enterprise-grade feature set:

- **Unified Multi-State Logic Engine**

We engineered a flexible rules engine that adapts to the unique tax exemption rules of each U.S. state, making CertSolv capable of handling compliance requirements across all jurisdictions.

- **Real-Time Legislative Updates**

Through integrations with legal databases and automated update modules, CertSolv now reflects real-time tax code changes, including updates to economic nexus thresholds and digital certificate regulations.

- **Smart Certificate Validation**

We introduced AI-powered document parsing and validation to detect fraud and expired certificates, ensuring only valid documents are accepted and stored.

The image displays three overlapping screenshots of the CertSolv web application interface. The top-left screenshot shows the 'Client Preferences' tab, listing 14 parameters such as 'Entity Trading Partner Share Level' and 'Certificate Expiring Soon Threshold in Days'. The top-right screenshot shows the 'Certificate User Defined Values' tab, displaying a grid of values for various parameters like 'Entity Trading Partner Share Level' and 'Certificate Expiring Soon Threshold in Days'. The bottom screenshot shows a 'Certificates' table with columns for Jurisdiction, Trading Partner Name, Trading P., Entity No., Exempti..., Form, Status, Effective..., Expirat..., and JOB. The table lists certificates for various states including Alabama, Arizona, and California, with details on their status and expiration dates.

- Automated Data Reconciliation

The system now auto-validates customer-entered certificate information against CRM records, flagging mismatches and suggesting corrections before certificates are accepted.

- Scalable Automation Framework

With batch processing, bulk uploads, and auto-validation, CertSolv now supports high-volume users with minimal manual intervention, reducing the average processing time by over 70%.

## Benefits

Implementing the enhanced CertSolv platform delivered significant improvements for enterprise clients. Manual processing time was reduced by 95% through automation and streamlined workflows. The platform boosted audit readiness with accurate data, real-time compliance tracking, and secure digital storage. CertSolv also ensured continuous compliance across all states without requiring frequent manual updates. Clients experienced fewer errors and faster onboarding, leading to higher customer satisfaction. Additionally, automatic expiration tracking and fraud detection helped mitigate financial risks associated with invalid or expired certificates.

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## What The Client Says About Us

"Fortunesoft IT Innovations has been an outstanding business partner for our company. After a terrible experience using offshore developers, we took a chance on Fortunesoft IT Innovations and they have been excellent to work with. The team is relentless in following agile development processes. They took the time to learn our business and it shows in the quality of the work they do. Their team has a broad range of skillsets and were able to help us with every aspect of our start-up company."

**Conner Humphrey**

Co-Founder SalesC2, Texas US

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