

TaxView™ Pro

Tax Audit and Accrual Solution



A single, turnkey solution that makes tax accuracy easy.

How much are sales and use tax errors costing you? For most companies the answer is shocking. Over payments, under payments and non-compliance can easily cost companies hundreds of thousands of dollars each year. Ideal for complicated tax requirements, TaxView Pro brings clarity and huge savings to your sales and use tax function. Our turnkey solution is configured at a granular level with all applicable tax rules for your business to calculate the most accurate tax possible.

Smart Technology and Smart Services.

Each TaxView Pro subscription includes a dedicated tax professional with TaxView expertise. Your Account Manager will be well versed in your unique tax requirements and will configure the software with your situsing and tax rules. Each month, your Account Manager also assists you to accurately calculate your taxes, resolve errors, set up new rules and prepare your accrual entries.

The power of TaxView Pro

How does TaxView™ continuously drive accurate tax calculations?

- **Maximum Rules Flexibility** – TaxView was built to provide maximum flexibility to any rule structure with dozens of data elements and operators. Virtually any rule can be written without limitation.
- **Zero Integration** – TaxView doesn't require integration with other financial/ERP systems. All transaction data is easily imported each month which results in a simplified implementation and lower cost of ownership.
- **Data Granularity** – TaxView is configured to accept more than 160 data elements, 51 of which can be used at a time to construct each tax rule.
- **Ultimate Visibility** – TaxView acts as a single system of record for sales and use tax. The increased visibility also allows you to review ALL your transactions in a short period of time.
- **Tax Rate Content** – Taxability content and rates are provided and kept up-to-date at no additional charge. You also have the flexibility to establish custom rate codes to address taxing scenarios unique to your business needs.

TaxView™ Pro Benefits

- Fast implementation – most clients are up and running in two months
- Easy configuration of rules as business and tax regulations evolve
- Granular visibility into ALL transactions, and ability to review them quickly
- Efficient audit and accrual process
- Accurate general ledger accrual entries are generated
- Quantifiable monthly savings
- More accurate monthly tax filings
- Eliminate the need for costly reverse audits
- Documented proof of compliance

Stop sweating sales and use tax errors. TaxView has you covered.

Key capabilities (cont.):

- **RuleBook** – Our RuleBook maintains the definition and hierarchy of your rule structure and provides a complete library of all your tax rules.
- **STAAR Algorithm** – STAAR (Synchronized Tax Attribute Assignment Routine), our proprietary algorithm, drives tax accuracy. When more than one rule matches the data elements of a transaction line, STAAR properly analyzes which rule should be used to derive correct taxability.
- **Exception Alerts & Reports** – TaxView provides reports that continually alert you to transactions that may have errors, don't map to a rule or need further research. In addition, more than 60 management reports are delivered to help with tax analysis and compliance reporting.
- **TV Navigator** – Our proprietary dashboard, provides a concise, batch-level view of every key piece of information that should be reviewed for the period. This includes visibility to your largest (5) over and under payments by rule, state and vendor. It also displays your gross and net tax standings for the batch and where your current rule approvals stand.
- **JE Writer** – Unlike tax engines that write journal entries (JE) directly to the general ledger, our JE Writer allows you to review and make changes to the proposed accruals prior to sending them to the ledger. Additionally, it provides a reconciled compliance file to assist with your filing obligations.
- **Streamlined Workflow** – TaxView contains built-in smart workflow technology that alerts your dedicated Account Manager every time you need to make a change to your tax rules.
- **TV Invoices** – Great for EFT transactions! From all the detailed transaction lines that are imported into TaxView, the system rebuilds electronic invoiced with the added detail of line item tax and tax discrepancy information. This powerful feature streamlines reconciliation for your internal tax team and auditors alike.
- **Refund Center** – TaxView is the only tax software that provides a mechanism for you to build and track refund claims that are associated with the errors found by your rule structure. TaxView's Refund Center also provides the supporting information to file refunds with vendors and/or taxing jurisdictions.

Real TaxView Client Results

Average Monthly Savings by Industry

Consumer Products	\$279K
Manufacturing	\$692K
Mining	\$352K
Oil & Gas	\$1.2M
All Industries	\$469K

What Makes TaxView Different?



Smart Technology

Maximum Flexibility &
Designed to Stay
Up-to-Date



Proven Rules Methodology

Drives the Most Accurate
Tax Possible



No Risk Model

Fast and Simple to
Implement & Delivers
Immediate Value

“TaxView provides unparalleled visibility, flexibility and configurability so the system fits how we need to manage our purchase-side tax data. It helps us quickly identify errors and take corrective action long before a state audit happens.”

- Tax Director, Fortune 500
Consumer Products Manufacturer