

# TaxView™ Diagnostic Review

Stop guessing if your sales and use taxes are correct.  
Let us show you with a Diagnostic Review.

When it comes to the power of TaxView, you don't have to take our word for it – we'll show you. Whether you need to try it before you buy it, build an airtight business case, or simply want to see the software and process in action, our Diagnostic Review gives you a real-world examination of how TaxView will benefit your business.

## How the TaxView Diagnostic Review works.

Your Diagnostic Review will follow our Proven Rule Methodology to build and configure tax rules specific to your industry and business requirements. Using your purchasing transaction data, the Dynamic Tax Solutions (DTS) team will implement and configure the TaxView software according to your taxation requirements. All your transaction data will be processed, and within one month, you'll get an accurate calculation of the sales and use tax for your transactions. You'll also see the quantified value of your costly over and under payments.

### Our Proven Rules Methodology

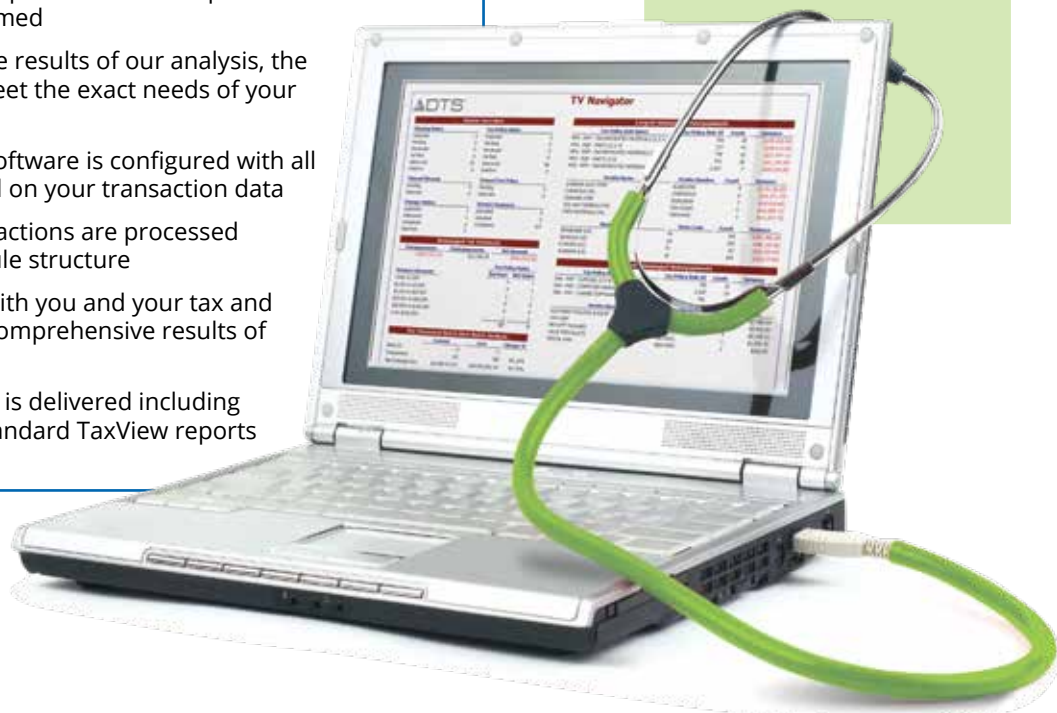
Developed over years of research and real-world substantiation, it's our secret sauce behind efficiency and tax accuracy.

## Quick Facts

- We use your data to produce concrete results
- Other than providing the data – we do all the work
- We apply our Proven Rules Methodology
- The entire process is completed in just 4 weeks
- Results are detailed & compelling
- You'll see the bottom-line savings impact of your over and under payments

## Here's how the Diagnostic Review process works:

- **Data Mapping** – DTS works with your tax team to identify the scope of data to be used
- **Import and Analysis** – your data is imported and a comprehensive analysis of the transactions is performed
- **System Configuration** – based on the results of our analysis, the TaxView software is configured to meet the exact needs of your data and business
- **Rules Configuration** – the TaxView software is configured with all situsing and tax rules required based on your transaction data
- **Transaction Processing** – your transactions are processed against the newly created TaxView rule structure
- **Review and Approval** – DTS meets with you and your tax and management teams to present the comprehensive results of the Diagnostic Review
- **Diagnostic Reports** – the final report is delivered including your choice of up to 10 of the 60+ standard TaxView reports



## Clearly see your sales and use tax savings before you buy.

Once our review is complete, you will receive a Diagnostic Report of results that will be reviewed with you and your team. This report provides complete visibility into your tax errors and what is needed to make the right tax decisions, drive accurate sales and use tax calculations, and the bottom-line savings it would mean to your company.

### Diagnostics Report of Summary and Line-item Findings

#### Summary

- ✓ Review period
- ✓ Total transactions
- ✓ Total dollars
- ✓ Total tax paid

#### Detailed Results

- ✓ Tax originally paid versus tax calculated by Taxview
- ✓ Tax policy structure and hierarchy
- ✓ Tax policy and situsing rules used
- ✓ Results analysis with dollar value (completed, errors, no rules or situsing match, etc.)
- ✓ Over payments and under payments tax variance

## It's a no-risk, cost-neutral assessment. The only price you pay is the price of not getting started.

The TaxView Diagnostic Review is a no-risk proposition. By performing an actual tax assessment and implementation, DTS puts skin in the game. The results deliver proof of the estimated tax savings that can go directly to your bottom line. The entire process also demonstrates the unmatched sales and use tax visibility and accuracy TaxView delivers.

The Diagnostic Review is a cost-neutral investment – your organization pays the lesser of a flat fee of \$30,000 or the amount of tax over payments identified by the review. And, if you choose to subscribe to TaxView within the Diagnostic period, we will credit the entire fee against your monthly subscription costs.

### Sales and Use Tax Findings\* (Averages by Industry)

#### All Industries

Monthly Over Payments: **\$415K**  
Monthly Under Payments: **\$369K**  
Monthly Savings: **\$469K**  
Projected Annual Savings: **\$6.0M**

#### Manufacturing

Monthly Over Payments: **\$601K**  
Monthly Under Payments: **\$415K**  
Monthly Savings: **\$692K**  
Projected Annual Savings: **\$8.3M**

#### Mining

Monthly Over Payments: **\$301K**  
Monthly Under Payments: **\$233K**  
Monthly Savings: **\$352K**  
Projected Annual Savings: **\$4.2M**

#### Oil & Gas

Monthly Over Payments: **\$1M**  
Monthly Under Payments: **\$797K**  
Monthly Savings: **\$1.2M**  
Projected Annual Savings: **\$14.4M**

#### Consumer Products

Monthly Over Payments: **\$256K**  
Monthly Under Payments: **\$103K**  
Monthly Savings: **\$279K**  
Projected Annual Savings: **\$3.3M**

#### Other Industries

Monthly Over Payments: **\$26K**  
Monthly Under Payments: **\$142K**  
Monthly Savings: **\$58K**  
Projected Annual Savings: **\$687K**

\* Savings were calculated from TaxView clients and include the full amount of identified tax over payments plus 22% of the identified tax under payments (10% for audit penalties and 12% for audit interest).



### Ready to get started?

Contact us to schedule a Diagnostic Review of your sales and use taxes or for more information. Call **1.678.566.3740** or email **info@dtstax.com**.

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