

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 Rules 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 4 to 6 weeks, 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 to 6 weeks.
- Results are detailed & compelling.
- You'll see the bottom-line savings impact of your over and under payments.

Diagnostic Review Steps for Success

Source Data - DTS will work with Tax & IT to determine what data should be pulled from the source system(s) for analysis by TaxView.

Data Analysis - DTS will perform a comprehensive analysis of your data to determine proper importability into TaxView and to identify the 51 data elements that will be used for determining proper taxability.

System Configuration - DTS will build a custom TaxView Environment to meet the specific needs of your company and related data.

Rule Configuration - DTS will build all necessary situsing and tax rules to properly determine the correct amount of tax due on every purchase.

Transaction Processing - DTS will process all source data against the custom rule structure to identify all potential over and under payments of tax present in the data set.

Report & Train - DTS will relay all Diagnostic Review findings to the tax team and subsequently train one user on using the system.

30-Day Access - DTS will provide one user with unlimited 30-day access to TaxView to validate results, make changes, and run over 80 different reports.



Clearly see your sales and use tax savings before you buy

Once our review is complete, all work performed and summary findings will be presented to the tax department. We will then provide 30-day unlimited access to TaxView, along with applicable user training, so that your organization can validate all findings, make any desired changes, and/or run more than 75 different reports on your source data. Examples of such reports include:

- ✓ Errors by Vendor
- ✓ Errors by State or Location
- ✓ Errors by Invoice
- ✓ Errors by General Ledger Account or Any Other Key Data Element
- ✓ Taxability Determination by Rule or State
- ✓ Tax Rule Structure & Hierarchy

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 \$35,000 or the amount of tax overpayments 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.

The Proof is in the Numbers

Average **Monthly ROI***

\$920M

Total Monthly Spend

All purchase-side activity.

\$391M

Analyzed Monthly Spend

Averages 45% of total purchase-side spend.

\$838K

Tax Overpayments

Dollars that fall straight to the bottom line.

\$548K

Tax Underpayments

Amount of mitigated risk.



Ready to get started?

Contact us to schedule a Diagnostic Review of your sales and use taxes.

Call **1.678.566.3740** or email info@dtstax.com