

# TaxView™ Express Tax Audit and Accrual Solution



## The power of an enterprise-grade tax solution packaged for the small and mid-sized company.



Even less complicated indirect tax issues are...well, complicated. You don't have to be a large enterprise to face enterprise-size tax challenges – especially when it comes to accurately calculating sales and use tax. The cost of inaccuracy can be dangerously high for small and med-sized companies. Over payments can take capital away from critical growth initiatives, and under payments can lead to costly penalties and large compliance risks.

TaxView Express solves these challenges. Ideally suited for smaller companies with less complex indirect tax requirements, TaxView Express is an out-of-the-box solution that simplifies sales and use tax calculations and makes the monthly audit process more efficient. It's designed to be easy-to-use and is managed internally by your tax team.

## Accurate sales and use tax calculations right out of the box.

These unique TaxView Express packaged capabilities help your internal tax team to continuously drive accurate tax calculations.

- **Smart Template** – TaxView Express clients are provided with a Smart Template that guides them through the process of properly determining what data field(s) should be imported into the application and prioritized to drive accurate tax decisions.
- **RuleBuilder** – RuleBuilder is a series of smart windows that guides the user through the process of defining all new situsing and tax rules. The embedded technology within the RuleBuilder helps to ensure all rules are created quickly, efficiently and accurately.
- **Express Manager** – The Express Manager provides the user with step-by-step instruction to guide the user from data import to fully processing their data. This technology completely takes all of the guesswork out of running the TaxView, and ultimately teaches the user important best practices in properly calculating their monthly tax liability.

 We recommend TaxView to our clients because it delivers big savings while reducing audit and tax liability risk. 

– Principal, Top Independent Audit and Advisory Firm

## TaxView™ Express Benefits

- Fast time-to-savings – you'll be up and running in days or weeks
- Easy, guided tax rule configurations
- Granular visibility into all of your transactions
- Smart technology guides your tax team through best practice monthly audit processes
- Confidence that accurate general ledger accrual entries are generated
- More accurate tax filings
- TaxView™ support services, including Account Manager guidance (for a fee)
- Eliminate the need for costly reverse audits once and for all
- Documented proof of compliance

# Forget complicated sales and use tax. TaxView makes it easy.

Your business is constantly changing, and so are tax requirements. TaxView gives you a solution that TaxView Express also delivers the following valuable features which help calculate the most accurate indirect tax possible and improve your visibility to purchase-side transactions and tax.

- **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 up to 30 data elements, 3 of which can be used at a time for tax rule construction.
- **Ultimate Visibility** – TaxView acts as a single system of record for sales and use tax. The increased visibility also allows you to review all of your transactions in a short period of time.
- **Tax Rate Content** – Taxability content and rates are provided and kept up-to-date as part of your subscription at no additional charge. You also have the flexibility to establish custom tax codes, if the published tax content doesn't completely meet your unique business needs.
- **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 taxing accuracy. When more than one rule matches a transaction line, this routine properly analyzes which rule should be used.
- **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 30 management reports are included 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) overpayments and underpayments by rule, state and vendor. It also allows you to see your gross and net tax standings for the batch.
- **JE Writer** – Unlike tax engines that write accrual journal entries (JE) directly to the general ledger, our JE Writer allows you to review and make changes to the proposed JEs prior to sending them to the ledger and provides a reconciled compliance file to assist with your filing obligations.
- **TV Invoice** – Great for EFT transactions! From all the detailed transaction lines that are imported into TaxView™, the system rebuilds an electronic invoice 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 refunds claims that are associated with tax errors with vendors and/or taxing jurisdictions.

## What Makes TaxView Different?



### Proven Rules Methodology

Drives the Most Accurate  
Tax Possible



### Smart Technology

Maximum Flexibility &  
Designed to Stay  
Up-to-Date



### No Risk Model

Fast and Simple to  
Implement & Delivers  
Immediate Value

## Trusted Experts Trust TaxView

TaxView Express is a perfect fit for auditing firms and tax consultants to serve their clients.

Contact us to learn more  
**info@dtstax.com**.



Smarter Sales and Use Tax Automation

## Ready to see TaxView Express?

Request a demo at **www.dtstax/demo** or contact us at **info@dtstax.com** or **1.678.566.3740**.

**www.dtstax.com**

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