

# INDIRECT TAX

## Integration for Microsoft Dynamics 365 for Operations

Companies of all sizes are using Enterprise Resource Planning (ERP) systems, such as Microsoft Dynamics 365 for Operations, to streamline their business processes. Automating your core operations is a huge benefit, but that is only one piece to a much larger puzzle. Unfortunately, most ERP systems aren't able to handle the core elements of transactional tax compliance, such as calculation, collection, reporting, and filing and remittance, leaving back-office staff to manage the processes manually.

Thomson Reuters ONESOURCE™ Indirect Tax is a comprehensive tax automation solution that connects with your Dynamics 365 for Operations system to enable accurate sales and use tax calculation, easy certificate management and effortless filing and remittance. The seamless integration automates the entire transactional tax lifecycle—from rate calculation and research to reporting and returns—so you can say goodbye to manual work and focus more on growing your business.

### INTEGRATION OVERVIEW

ONESOURCE Indirect Tax makes sales and use tax compliance easy by intelligently calculating and applying real-time tax decisions at the point of transaction, right inside of your Dynamics 365 for Operations system. Industry-leading tax content from ONESOURCE ensures tax calculation on both order-to-cash and procure-to-pay transactions in Dynamics 365 Operations accrue tax correctly, avoiding costly penalties and time spent on the audit process.

Here's how it works: Each time you run a sales or purchase transaction in Dynamics 365 for Operations, the ONESOURCE integration instantly processes the data through our patented tax determination engine. In milliseconds, the engine determines the exact sales or use tax and automatically applies it back to the transaction in your Dynamics 365 for Operations system.

### INTEGRATION OVERVIEW

#### SIMPLE

- + Automates sales, use and value-added tax management across your business.
- + Removes manual tax rate and rule maintenance with built-in, continuously updated certified tax research.
- + Works behind the scenes of your existing system with no disruption to user experience or workflows.

#### FLEXIBLE

- + Scales to support business growth with an unrivaled global vantage point.
- + Offers enterprise-grade configurability to meet the specific tax needs of your company.
- + Delivers flexible integration options for multiple systems, enabling company-wide automation.

#### RELIABLE

- + Advanced address validation and geolocation technology ensure sales tax calculations are accurate every time.
- + Built following Microsoft development best practices to assure superior compatibility and functionality.
- + Reduces risk to projects and ongoing operations with expert-led implementation and support.

## FEATURES

ONESOURCE Indirect Tax for Dynamics 365 for Operations enables companies to extend the functionality of their ERP software to handle the entire sales and use tax lifecycle, from tax calculation to signature-ready returns. This powerful integration delivers the SaaS capabilities users expect plus the robust features more than 7,000 companies rely on globally.



### PATENTED TECHNOLOGY

Seamless integration with the industry's only patented sales, use and value-added tax determination engine.



### ACCURATE CALCULATIONS

Precise, instantaneous sales and use tax calculations securely and automatically delivered back to your system.



### AUTOMATIC UPDATES

Automatic updates to tax rates and rules directly in ONESOURCE, removing the need to maintain them in your native system.



### ADDRESS VALIDATION

USPS CASS-certified address validation quickly cleanses, verifies and stores addresses with roof-top level accuracy.



### PRODUCT TAXABILITY

Specific taxability rules can be mapped to millions of products and services in seconds, ensuring accurate calculation in every jurisdiction.



### EXEMPTION MANAGEMENT

Manage and record exemption taxability in real-time at the line level with tax override and adjustment functionality.



### DYNAMIC REPORTING

Robust reporting functionality leverages D3650 capabilities to assist in filing and remittance activities, and audit defense.



### SALES & USE TAX SUPPORT

Real-time support for selling and buying transactions, including use tax accrual, enables complete visibility.

ARE YOU READY TO SIMPLIFY YOUR SALES AND USE TAX PROCESS?

CONTACT US TODAY.



1.800.865.5257



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