

NUMBERS

YOU CAN COUNT ON

Get access to all your indirect tax data
for **faster analytics and reporting**

Next-generation reporting and analytics turn your
indirect tax team into a strategic business partner

“Internally, corporate tax departments are also being asked to do more — collect and analyze data across the enterprise, conduct wider ranging risk assessments, provide strategic intelligence, participate in business planning, and find new ways to extract value for the corporation — and they are being asked to do it all faster and with fewer resources.”

— Thomson Reuters 2022
Corporate Tax
Departments Survey

Business leaders need **indirect tax** professionals to provide accurate, customized analytics and reporting to guide their decision-making and help fuel corporate growth. They want their tax advisors to bring these capabilities in real time, rather than waiting days or weeks for data that’s outdated on arrival. Sales and use tax, value-added tax (VAT), and goods and services tax (GST) professionals similarly seek to serve as strategic partners to the business, rather than simply service providers. To do that, they need a future-proof **indirect tax software solution** to access, interpret, and scale with the growing data volumes they manage. Tax leaders are looking for a user-friendly, next-generation reporting solution that can empower indirect tax teams and business users alike, streamlining operational processes even if their users lack significant technology skills.

Get indirect tax reports built on current, accurate data for strategic advantage

Strategic decisions are built on reports that provide fast, accurate, and up-to-date **tax data and analysis**. But many indirect tax teams are still using manual processes, including manual data input and linked spreadsheets to perform complex calculations. They also often rely on customized enterprise resource planning (ERP) solutions that entrench data into silos for each business unit. Although industry tax technology solutions abound, overworked teams may lack the skills, time, training, or desire to adopt them, leading to postponed deployments or underutilized systems.

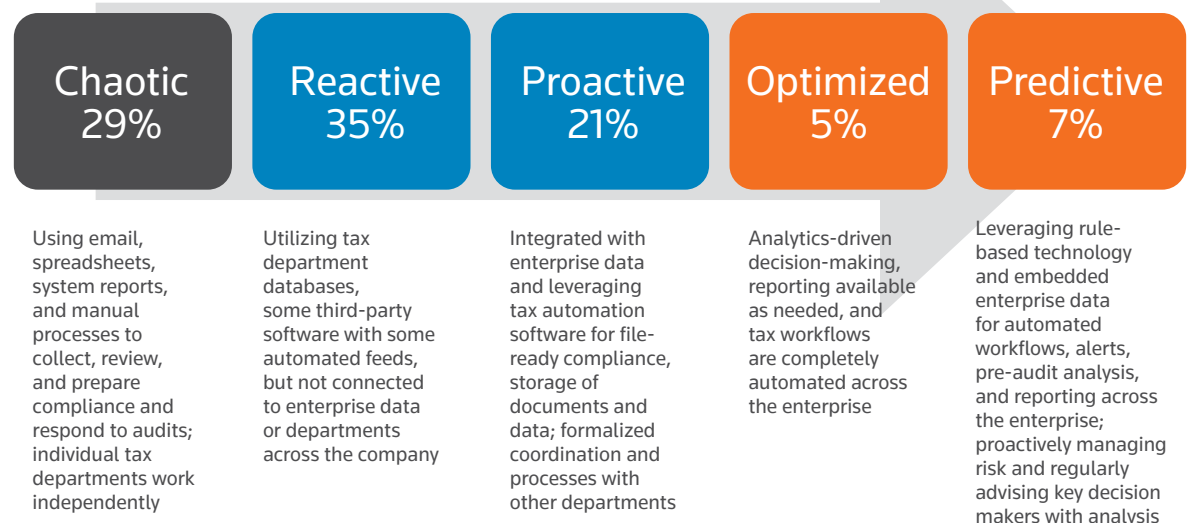
Indirect tax teams need easy-to-use, intuitive tools that help them do their jobs without requiring significant technical skill and training. A growing remote workforce and the ever-increasing pace of business have strained manual processes to the breaking point. Corporations are embracing digital transformation, product and service innovation, mergers and acquisitions, and global growth. These imperatives are creating new tax responsibilities for already overburdened teams who are striving to keep pace with regulatory change. Consequently, many technology projects may be put on hold as indirect tax teams struggle to address changing priorities and their increased responsibilities.

Now is the time for indirect tax teams to press forward with next-generation reporting and analytics

The solution is not to delay or cancel technology deployments, but rather to implement the right indirect tax technology. The ideal indirect tax system surfaces critical data in visual and other formats, provides customizable and sharable reporting, and is easy for both tax teams and business stakeholders to use.

By providing ready access to accurate, up-to-date data and analytics capabilities, corporate tax departments can move beyond chaotic and reactive manual processes. The right technology enables them to adopt digital tax workflows and automation capabilities that provide the single version of truth that both tax teams and key stakeholders want. In the corporate tax survey, respondents cited direct cost savings, lower risk, and higher quality and accuracy due to standardization as their top three desired gains for implementing tax technology.

In a 2022 Thomson Reuters **survey of corporate tax departments**, 57% of tax professionals said their teams were under-resourced. In addition, 39% stated that their teams possessed a tax skills gap and 30% cited a technology skills gap.



Key tax reporting and analytics capabilities indirect tax professionals need

What capabilities should you look for as you evaluate indirect tax analytics solutions? If your goal is to upgrade your current reporting capabilities, consider software vendors and solutions with the following key benefits:

- **Data architecture that enables data movement.** Tax professionals need real-time access to transactional and tax data with the ability to build scalable and repeatable reports for various tax processes. Ideally, your data will be collected only once, automated, and integrated across all of your tax systems. Consider a **data management tool** that is versatile enough to help you standardize, organize, and optimize data and how it's used in your system. Your **provider's software solution** should load and prepare your data for enhanced reporting and analytics, as well as provide a platform that can ingest, classify, validate, store, and access all of your tax data reporting needs.
- **Unlimited data storage and access.** Find a future-proof solution that will easily integrate new data sources and scale with fast-growing data volumes. This will help you gain control over all your indirect tax data while ensuring that you always have a holistic and historical view of your performance.
- **A single tax data source.** Accurate reports depend on accurate data. Many organizations run customized ERP solutions that entrench data in silos, making it challenging to gain a total picture of tax spending. A software solution like **ONESOURCE® Determination Reporting and Analytics** uses an **API** to integrate your ERP systems and e-commerce operations across all regions for a single view of your tax spending. Benefit from streamlined data access, without the need to rekey transactions. Gain a holistic view — or examine the details of an individual transaction. Maintain all your tax data in a scalable repository from the day you go live. Gain fast access to historical insights and ensure your readiness to meet audit and compliance requirements.
- **Analytics capabilities in a single application.** You need integrated tax data and analytics to review emerging and historical trends — as well as anomalies. ONESOURCE Determination Reporting and Analytics helps you produce reports quickly or in real time, with ultra-fast processing of vast data sets. Avoid data latency issues or the overnight report crashes that can occur when data is ingested and analyzed from multiple sources using a less scalable solution.
- **Visualizable tax data to facilitate stakeholder communications.** A graphical interface can help you create charts and graphs instantly — or change views for a different, deeper look. For example, with the graphical interface in ONESOURCE Determination Reporting and Analytics, you can help your business stakeholders understand indirect tax data easily with visuals and hold better conversations to drive faster decision-making.

Survey respondents identified tax reform, law changes, and developing efficient tax workstreams as their biggest challenges for the coming year (2022).



- **Detailed, customizable views.** Look for a solution that allows you to view your indirect tax globally or across specific tax types, then switch views to see more granular tax data in context. For example, you could analyze tax spending at a specific plant, county, or state level or by product type or SKU. For ease of use, tax teams should be able to manipulate data within the reporting dashboard itself or export the data into Excel, CSV, or PDF formats for additional analysis.
- **Fast and easy standard reporting.** A software solution with out-of-the box reporting enables sales and use tax, VAT, and GST professionals to auto-populate reports with the latest data. This can provide your team with instant access to key insights while also giving users time to familiarize themselves with the customization capabilities of a new reporting solution.
- **Flexible, shareable tax reporting.** Tax analytics solutions should enable the creation of customizable and sharable reports. ONESOURCE Determination Reporting and Analytics provides drag-and-drop functionality to create and save reports for stakeholders. With this solution, you can categorize confidential or tax team-only reports as private, ensuring that they are available only to authorized users.
- **Automated report production.** Tax automation is a significant efficiency booster. With automated report production, you can set up reports once — and then automate their production moving forward. With a software solution that enables you to simply log in to access the latest data and analytics, you can focus your indirect tax teams on higher-value work, such as analyzing inventory movements; validating and reconciling vendor-paid taxes; and pursuing tax credits, incentives, and exemptions.

With ONESOURCE Determination Reporting and Analytics, you can:

- Quickly get to relevant data by running standard reports in sample data mode, then flip to full data view when you're comfortable with the presentation
- Easily design more relevant tax reports by using drag-and-drop to add new data point columns
- Move seamlessly from summary or subtotal views to detail view by simply clicking a toggle button
- Easily enable sort and filter criteria for detailed views
- Efficiently add advanced analytics by adding Calculate and Measure fields, which enable you to design user-defined parameters to leverage complex algorithms for isolating key data point parameters
- Save, share, and reuse both public and private tax reports for repetitive processes across user groups and business organizations



How ONESOURCE Determination Reporting and Analytics can help you accomplish your indirect tax reporting goals and support strategic decision-making for the business

ONESOURCE Determination **global tax determination software** can help you meet all of your indirect tax processing and reporting needs.

The only industry calculation-to-compliance tax solution that delivers indirect tax rates, logic, rules, and policy from a global perspective, ONESOURCE Determination Reporting and Analytics gives you the next-generation reporting and analytics you need to maintain compliance and support proactive, informed decisions.

ONESOURCE Determination Reporting and Analytics offers end-to-end automation for determining, calculating, and recording your **global indirect tax liability** that spans 190 countries and 19,000 global tax jurisdictions. It's a comprehensive, web-based solution for VAT, GST, and sales and use tax that's used by global leaders to optimize processes and right-size tax spending.

In addition, it provides interfaces to SAP, Oracle, and other ERP platforms, ensuring that you can easily access and aggregate your data. It offers scalable reporting, data visualization, and analytics that grow with your business. You can empower users with:

- Prebuilt, editable starter reports
- Custom report generation with drag-and-drop functionality
- Both shared and private reports

You can even create and share transaction-level reports on all your data with ONESOURCE Determination Reporting and Analytics.

To ensure global deployment and scalability, ONESOURCE Determination Reporting and Analytics uses a cloud-based architecture built on industry-standard technology and state-of-the-art design principles, making it ideal for software security center (SSC) deployment. **ONESOURCE Determination Reporting and Analytics is strategically designed to optimize performance, reliability, interoperability, scalability, and security.**



An easy-to-use tax reporting dashboard increases adoption and standardization across your organization

With easy access to accurate data and analytics, your indirect tax teams are liberated from repetitive manual tasks and can focus on better decision-making and adding strategic value. The ONESOURCE Determination Reporting and Analytics dashboard (Figure 1) is an essential software tool that adapts to your needs. You do not need to be an expert in technology or bring in IT resources to build a report that addresses your specific needs. You can create the reports and analytics you need on demand.

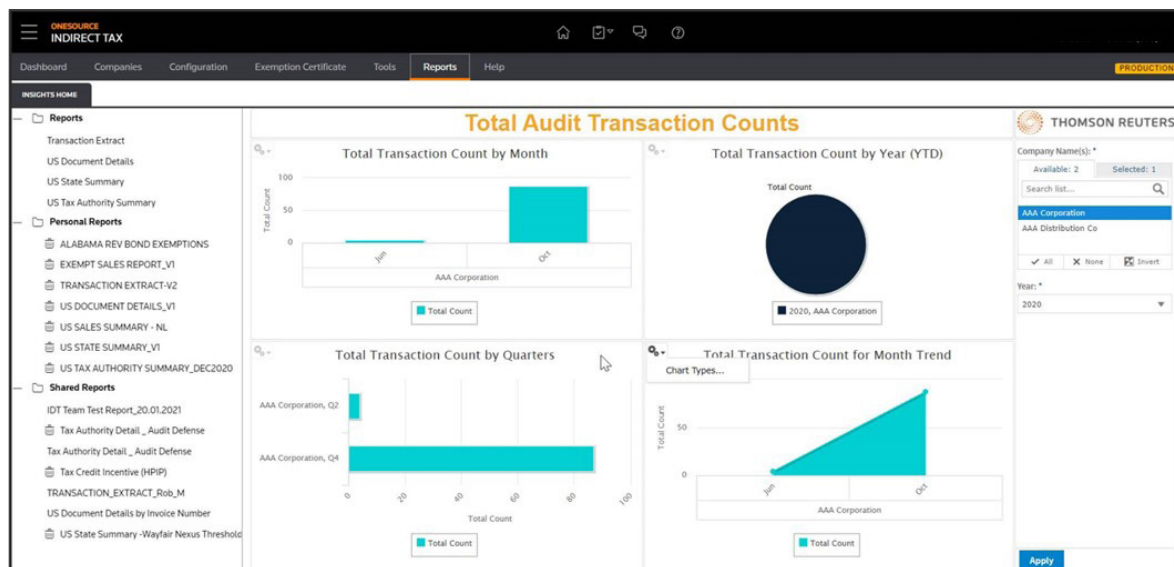


Figure 1: ONESOURCE Determination Reporting and Analytics dashboard

Use the Filter criteria option to easily filter and customize the data view to meet your needs (Figure 2). Quickly change filters for different views of the data. The data is pulled from the central repository; it is accurate and current, and your reports are updated in real time.

INDIRECT TAX

Dashboard

Companies

Configuration

Certificate Manager

Tools

Reports

Help

Daves User

Indirect Tax Pre-Sales (888)

INDIRECT TAX

CREATING CUSTOM EXEMPT SALES REPORT_V1

TOPICS: Transaction Extract

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Taxable State

Authority Type

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Total Gross Amount

Exempt Amount

Exempt Flag

Groups

Taxable State

Transaction Extract

CALIFORNIA

D&D123

101-Sales-CA-CO-TX

Jan 1, 2019

CALIFORNIA

County Sales/Use

FREIGHT

33,000.00

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WCD19595

101-Sales-CA-CO-TX

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District Sales/Use

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101-Sales-CA-CO-TX

Dec 1, 2019

CALIFORNIA

County Sales/Use

FREIGHT

33,000.00

1,000.00

Y

WCD19595

101-Sales-CA-CO-TX

Dec 1, 2019

CALIFORNIA

City Sales/Use

FREIGHT

-33,000.00

-1,000.00

Y

WCD19595

101-Sales-CA-CO-TX

Dec 1, 2019

CALIFORNIA

State Sales/Use

FREIGHT

-33,000.00

-1,000.00

Y

ADB123

101-CA-CO-NY

Dec 1, 2019

CALIFORNIA

District Sales/Use

FREIGHT

33,000.00

1,000.00

Y

ADB123

101-Sales-CA-CO-TX

Sep 1, 2019

CALIFORNIA

District Sales/Use

FREIGHT

33,000.00

1,000.00

Y

CALIFORNIA Totals

9

10

10

10

10

10

198,000.00

6,000.00

10

COLORADO

WCD19595

101-Sales-CA-CO-TX

Mar 1, 2019

COLORADO

District Sales/Use

FREIGHT

33,000.00

1,000.00

Y

D&D123

101-Sales-CA-CO-TX

Jan 1, 2019

COLORADO

State Sales/Use

FREIGHT

33,000.00

1,000.00

Y

WCD19595

101-Sales-CA-CO-TX

Mar 1, 2019

COLORADO

State Sales/Use

FREIGHT

33,000.00

1,000.00

Y

ADB123

101-Sales-CA-CO-TX

Sep 1, 2019

COLORADO

District Sales/Use

FREIGHT

33,000.00

1,000.00

Y

ADB123

101-Sales-CA-CO-TX

Sep 1, 2019

COLORADO

State Sales/Use

FREIGHT

33,000.00

1,000.00

Y

101-GUADALUPE-CA-CO-NY

Jan 1, 2020

COLORADO

District Sales/Use

FREIGHT

33,000.00

1,000.00

Y

101-GUADALUPE-CA-CO-NY

Jan 1, 2020

COLORADO

State Sales/Use

FREIGHT

33,000.00

1,000.00

Y

101-GUADALUPE-CA-CO-NY

Feb 1, 2020

COLORADO

District Sales/Use

FREIGHT

33,000.00

1,000.00

Y

101-Sales-CA-CO-TX

Oct 1, 2019

COLORADO

District Sales/Use

FREIGHT

33,000.00

1,000.00

Y

WCD19595

101-Sales-CA-CO-TX

Nov 1, 2019

COLORADO

State Sales/Use

FREIGHT

33,000.00

1,000.00

Y

WCD19595

101-Sales-CA-CO-TX

Nov 1, 2019

COLORADO

State Sales/Use

FREIGHT

-33,000.00

-1,000.00

Y

ADB123

101-CA-CO-NY

Dec 1, 2019

COLORADO

District Sales/Use

FREIGHT

33,000.00

1,000.00

Y

COLORADO Totals

9

12

1

Figure 2: Filter criteria to customize data views

You can focus on reports and analytics that inform your decisions and forecasts. For example, if you're running a state summary report to view total sales by state, you can gain insight into whether you've reached the nexus threshold and now have a tax obligation (Figure 3).

	Taxable State	Company Role	Gross Amount	Exempt Amount	Taxable Amount	Tax Amount	Document Count
US State Summary							
XYZ Demonstration Co							
	ARKANSAS	Seller	10,000.00	0.00	10,000.00	0.00	10
	MINNESOTA	Seller	13,000.00	0.00	14,000.00	0.00	13
	NEBRASKA	Seller	82,000.00	0.00	118,000.00	0.00	29
	NORTH DAKOTA	Seller	9,000.00	0.00	9,000.00	0.00	9
	OKLAHOMA	Seller	8,000.00	0.00	11,000.00	0.00	8
	SOUTH DAKOTA	Seller	167,000.00	0.00	208,000.00	0.00	31
	WYOMING	Seller	8,000.00	0.00	10,000.00	0.00	8
XYZ Demonstration Co Totals			297,000.00	0.00	380,000.00	0.00	108
			297,000.00	0.00	380,000.00	0.00	108

Figure 3: State summary report viewing total sales by state

Transforming global financial operations

A leading manufacturer of laser printers uses ONESOURCE solutions, including ONESOURCE Determination, to centralize indirect and property tax processes across 100 countries. Benefits include an automated, centralized system for taxes that enabled the company to manage tax exemptions without assistance from IT, simplify their tax code maintenance in SAP, and create greater flexibility for complex tax scenarios. They also gained user-friendly configurability and efficient and accurate management of tax data with up-to-date content.

Your indirect tax team can be a strategic partner to the business with ONESOURCE Determination Reporting and Analytics

When you use ONESOURCE Determination Reporting and Analytics capabilities, you will help your tax organization:

- **Become a proactive partner.** Provide instant access to the tax data your business units need. Enrich your data, so that it becomes increasingly useful over time. Set up sharable, self-service reports so that business stakeholders can always access up-to-date analytics, without delays due to tax team or IT intervention. Set up permissions to empower or control who can generate reports.
- **Shape strategic decision-making.** Easily generate reports that interpret analytics results, helping business stakeholders understand the impacts of their decisions and analyze tradeoffs. Share insights on emerging trends to prepare for changing payment requirements. Repurpose data for new reports, such as voluntary disclosure agreements or reports required when your tax liability exceeds a nexus threshold.
- **Predict tax spending.** Avoid tax overpayments, which reduce working capital and require time to recoup. Use ONESOURCE Determination Reporting and Analytics to predict — and pay — the right sales and use tax, VAT, and GST in every tax jurisdiction in which you operate. Sample tax items to validate your approach and avoid errors.
- **Capture tax credits and incentives.** Your business may be eligible for credits and incentives based on the sales, use, and income tax you pay. Generate the robust transactional data and reports you need to file for — and secure — these key incentives.
- **Simplify tax compliance and audits.** Create automated, custom reports that are tailored to your compliance and audit needs to quickly demonstrate tax compliance and prepare for audits without straining team resources or needing to add new staff.
- **Work more efficiently.** Reduce low-level busywork, such as manual data input, Excel table manipulation, data exporting, or report generation. Avoid team errors that lead to tax overpayments, unrealized incentives, and more. Use a centralized dashboard and tools to facilitate collaboration, streamline processes, and gain economies of scale.

Adobe reduces ERP customization and completes sales tax returns faster

As a multinational software company operating in a constantly evolving global tax and e-commerce landscape, Adobe sought to increase control over its indirect tax processes. Manual processes involving millions of line items led to inaccuracies and wasted time. For example, sales tax returns took the tax department nearly two weeks to complete and required heavy intervention by IT. To reduce this inefficiency, Adobe's IT director set a goal to remove 40% of this customization from SAP.

After implementing ONESOURCE, Adobe was able to reduce unnecessary tax management costs by \$1 million, reduce Advanced Business Application Programming (ABAP) coding and SAP customizations related to tax processes by 95%, and streamline reporting. Sales tax returns now take just 30 minutes to process, instead of the two weeks they took before deployment. The significant time savings allows the tax department to focus more on tax strategy and analysis, giving many individuals a chance to evolve and expand their roles.

"With the global tax landscape presenting numerous challenges for today's tax department, ONESOURCE Indirect Tax provides a centralized approach for increased compliance, accuracy, and control that gives tax departments an opportunity to not only address these challenges but elevate their status within their organizations as a trusted partner to senior leadership," says Brian Gardner, Adobe's Director of Global Indirect Tax.

Get more from your indirect tax data with ONESOURCE Determination Reporting and Analytics

Strategic decisions rely on reports that provide fast, accurate, up-to-date data and analysis. Your sales and use tax, VAT, and GST professionals can provide strategic leadership with reporting and analytics from ONESOURCE Determination. Empower your tax team and business users with the insights they need for strategic decision-making, while making it easy to integrate myriad data sources and grow data volumes. Help your business power global growth by automating processes, reducing costs, accurately accounting for taxes, and capturing the full range of tax incentives your business may be entitled to.

Contact one of our indirect tax experts to learn more about **ONESOURCE Determination** and our reporting and analytics capabilities.