

Indirect Tax

Integration for Microsoft Dynamics 365 for Finance and Operations, Enterprise Edition

Companies of all sizes are using Enterprise Resource Planning (ERP) systems 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.

ONESOURCE® Indirect Tax is a comprehensive tax automation solution that connects with Microsoft® Dynamics 365 for Finance and Operations, Enterprise edition, 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 intelligently delivers billions of real-time tax decisions at the point of transaction, right inside of your Dynamics 365 system. This scalable solution is tightly integrated into your existing sales and purchasing processes, enabling you to better manage your tax requirements and gain a complete view of your transactional tax liability from a single, unified platform.

Each time you run a sales or purchasing transaction in your Dynamics 365 system, the ONESOURCE Indirect Tax processes the data through the ONESOURCE tax determination engine to instantly calculate precise taxability, validate the customer address and apply the final tax decision back to the transaction in Dynamics 365.

Key Benefits

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

Connecting ONESOURCE Indirect Tax with Microsoft Dynamics 365 for Finance and Operations, Enterprise edition, enables companies to extend the functionality of their ERP software to handle every step of the sales and use tax process. This powerful integration delivers the SaaS capabilities users expect plus the robust features thousands of companies rely on globally.



Trusted Tax Content

Automatic tax rate updates for thousands of tax authorities globally, removing the need to maintain them in your native system.



Automated Calculations

Accurate, real-time sales and use tax calculations securely and automatically delivered back to your system.



Product Taxability

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



Address Validation

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



Dynamic Reports and Returns

Robust reporting functionality leverages Dynamics 365 capabilities to assist in filing, remittance, and audit defense.



Exemption Management

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



Sales and 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.

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