



Case Study

Bluebeam

Bluebeam Gains Efficiencies by Automating Sales Tax in the Cloud with ONESOURCE

Learn how growing software company Bluebeam transformed their transaction tax activities in NetSuite with Thomson Reuters ONESOURCE™ Indirect Tax.

Overview

Bluebeam, a software company focused on developing collaboration and workflow efficiency solutions for design and construction professionals, was growing rapidly and needed a reliable solution for keeping up-to-date with ever-changing sales tax laws and an increasing number of orders. With NetSuite as their ERP provider, the Bluebeam tax team made the decision to implement ONESOURCE Indirect Tax Integration for NetSuite to manage and automate their transaction tax activities.



"We wanted a reliable, accurate tax solution that was flexible enough to grow with our company and would give us confidence that our tax activities were accurate."

— Fang An
Project Manager, Bluebeam

Understanding the Challenges

As a rapidly growing software company with a small back-office tax team, Bluebeam was new to tracking sales tax and needed help determining nexus. Because the company sells to all 50 states, staying up-to-date on tax rates and rules was a challenge, to say the least. With limited resources, they lacked the time needed to keep track of sales tax and file manually.

The Bluebeam team came to the decision that they needed a transaction tax solution that would eliminate their manual processes, automatically keep up-to-date with constantly evolving tax rates and could scale as the company grew. With NetSuite as their ERP platform, it was also critical that the technology they chose integrated seamlessly with minimum disruption to their existing workflows.

Challenges

- Managing nexus in all 50 states
- Keeping up-to-date with constantly changing tax rates and rules
- Time-consuming manual processes
- High volume of orders
- Rapid growth

Choosing ONESOURCE

After researching several transaction tax solutions and evaluating their functionality, the Bluebeam tax team decided on ONESOURCE Indirect Tax Integration for NetSuite because of its ability to meet their current needs, grow with them into the future and integrate with their NetSuite ERP platform. As a scalable solution, ONESOURCE was exactly what Bluebeam needed to better manage their tax requirements and gain a complete view of their sales tax liability from a single, unified system.

“When it comes to the sale of software, every single state charges a slightly different rate based on product classification. And software isn’t always taxable, so it gives us peace of mind that ONESOURCE is automatically tracking and applying evolving rates and rules so our customers are being charged correctly.”

— Chris Donnelly
Senior Accountant, Bluebeam

The decision to choose ONESOURCE also had to do with the commitment they saw from the Thomson Reuters team early on. With an aggressive 8-week timeline for implementation, Bluebeam needed assurance that the Thomson Reuters team would handle their implementation and ensure they were set up for success on time. By working together closely, the Bluebeam and ONESOURCE teams successfully met their goal, even moving their go-live date up by several days.

“The ONESOURCE team worked tirelessly to achieve our aggressive timeline. The commitment was there from the very beginning. Their responsiveness exceeded our expectations.”

— Fang An
Project Manager, Bluebeam

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Achieving Results

Through the patented ONESOURCE tax determination engine, the sales and buying transaction data that Bluebeam enters into NetSuite is processed to instantly calculate precise taxability, validate the customer address and apply the final tax decision back to the transaction in NetSuite. This enabled Bluebeam to gain control over their back-office processes, while boosting their productivity.

With robust reporting capabilities built right in, Bluebeam can also utilize ONESOURCE to customize reports and create returns for easy filing and audit defense.

Because the ONESOURCE solution integrated seamlessly with Bluebeam’s existing workflows, the learning curve was minimal and the adoption process was smooth. The end result was an extended functionality of their ERP software to handle the entire sales tax lifecycle — from tax calculation to signature-ready returns — with little disruption to their existing workflows.

The Bluebeam team says they would definitely recommend ONESOURCE to other companies who are looking to automate sales tax management.



“ONESOURCE has made managing the entire sales tax process seamless and streamlined. From an operational standpoint, it’s great.”

— Chris Donnelly
Senior Accountant, Bluebeam

Results

- Automated transaction tax management
- The elimination of manual, time-consuming processes
- Automatically updated sales tax rates and rules
- Confidence that the data on their returns was always accurate
- Built-in logic to determine sales tax without any special customizations
- Scaled business support to match their growth, including VAT support
- Access to reports and data, ultimately reducing audit risk
- Superior compatibility and functionality as a Built for NetSuite certified integration