



# Streamlining Tax Operations with Microsoft & ONESOURCE

Utilize your organization's Microsoft instance for improved visibility, insights, and overall control leveraging Power Platform & ONESOURCE data

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# Common operational challenges



Limited visibility into global responsibilities, status of filings, & cash taxes



Documents are buried in multiple locations and difficult to search



The concept of inquiry management, especially in the form of notices and assessments, are difficult to track



Lack of insights to tax processes, constant use of spreadsheets, & siloed data



Difficult to automate the distribution of secure data with ability to collect sensitive information

How do we  
solve for these  
challenges?

# Each of these challenges has a solution

...and you may already have access to them



Limited visibility into global responsibilities, status of filings, & cash taxes



WorkFlow & Tax Calendar



Documents are buried in multiple locations and difficult to search



FileRoom



The concept of inquiry management, especially in the form of notices and assessments, are difficult to track



Global Tax Audit Manager



Lack of insights to tax processes, constant use of spreadsheets, & siloed data



Data Hub




Difficult to automate the distribution of secure data with ability to collect sensitive information



DataFlow





What if we do not have  
access to any of these  
applications or we do  
and we want to begin  
integrating them with  
additional  
applications?

# Utilize your existing Microsoft applications to handle these challenges

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- Not looking to “buy” a new software to serve a specific need but instead leverage an existing technology already available
- Aiming to avoid a separate licensing fee for a new tool for solving a particular pain point
- Application that may be “off-the-shelf” but can be re-purposed or integrated with other ONESOURCE applications to help solve multiple pain points

# How does it work?

Imagine building a house...



## Foundation & Framework

- Establish a well-laid foundation & framework to support the entire structure
- Entities, jurisdictions, service types, users, & permissions

## Interior & Utilities

- Continue by adding walls, floors, & plumbing until it becomes hospitable
- Populate filing event details to form a tax calendar, establish milestone steps for workflow tracking, & begin uploading documents using standard file tagging

## Finishing Touches & Extras

- Customize the home and make improvements like adding a pool & garden
- Continuing to expand on the common data model but for unique uses like custom dashboards, notice tracking, K1 distribution, exemption campaigns



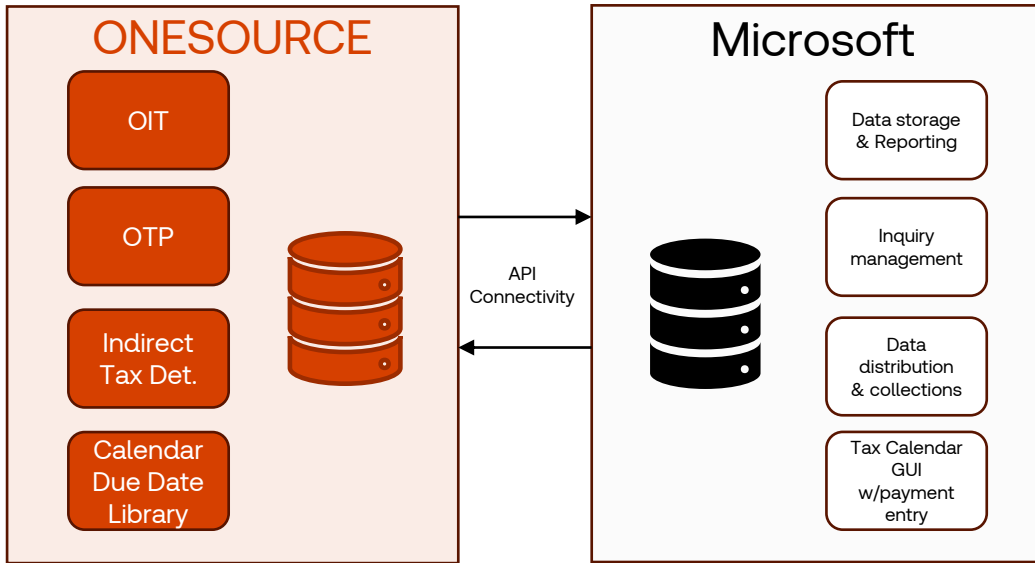
# Demonstration





# Takeaways

Configure, integrate, & continue to scale for your specific need



## Workflow, Tax Calendar, & Ad-hoc Tracking

Assign milestone-level tasks and detailed checklists to stakeholders and monitor status with dashboards and automated notifications



## Document Management

SharePoint integration provides a secure library to store documents and manage SOX compliance with permissions management and an edit history



## Data Storage, Connection, & Reporting

Configure schema for storing your data and establish connections to source systems, inputs, and embedded dashboards for reporting & insights



## Distribution & Collection of Data

Securely store data with ability to configure automation capabilities for common items like tax packages, surveys, questionnaires, & K1s



## Collaboration

Integration with Microsoft Teams makes collaboration easy between colleagues and external parties

Thank  
you!