

Innovyze enlists NexusTek to integrate software application AvaTax and Microsoft Dynamics CRM, reducing human error and financial risk for sales and use tax.

Innovyze®

Overview

Location: Broomfield, CO

Solution Highlight: Microsoft Dynamics CRM

Website: www.innovyze.com

Company Profile:

Innovyze is a leading global provider of wet infrastructure business analytics software solutions designed to meet the technology needs of water/wastewater utilities, government industries, and engineering organizations worldwide.

Business Situation:

Innovyze was manually entering tax and shipping calculations on quotes and invoices, creating inordinate risk due to human error and significant manual effort to comply with local regulations.

Solution:

NexusTek designed a custom integration between Microsoft Dynamics CRM and AvaTax. This solution automates the calculation and application of accurate tax and shipping charges to eliminate mistakes and minimize risk.

Benefits:

- Improved accuracy
- Reduced risk
- Faster quote turnaround and better customer service

“ We always know what to expect with NexusTek. Their professional staff always deliver and exceed expectations, even in the most complicated of situations.” – Tim Gallagher, Innovyze

Business Need

Innovyze was struggling to manage tax calculations throughout multiple jurisdictions across the United States. Prior to enlisting the help of NexusTek, the company was forced to manually enter tax calculations into quotes and invoices, elevating risk due to human error. A similar process was in place to calculate and add shipping charges to quotes and invoices, introducing the same opportunity for mistakes. Inaccurate or missing tax calculations or freight charges exposed Innovyze to harsh penalties and potential government audits

Solution

Innovyze enlisted the help of NexusTek to design and implement a custom integration between Microsoft Dynamics CRM and the tax calculation software, AvaTax. AvaTax provides automation for tax calculations and dynamically updates itself to maintain real-time accuracy for tax rates. This integration allowed Dynamics CRM, the company's customer relationship and order management application, and AvaTax to communicate automatically to perform and add tax and shipping calculations into quotes and invoices.

Results

The integration between Microsoft Dynamics CRM and AvaTax has significantly reduced the possibility of inaccurate tax calculations. Because AvaTax maintains tax rates dynamically, confidence in tax accuracy is greatly increased and audit risk is greatly minimized. Finally, by automating the process, Innovyze is experiencing faster quote turnaround and sales tax filing preparation.