



Returns Excise Enterprise

Signature-ready excise and sales & use tax return generation



Business challenge

Midstream and downstream energy companies operate in a highly regulated industry. Whether acting as a refiner, terminal operator, supplier, distributor, retailer, or trader, each time a product is sold or moved, it may be subject to one or more taxes. In fact, each federal, state, and local jurisdiction has its own rules, regulations, rates, and forms required for comprehensive fuel tax compliance. This complexity makes compliance difficult, and tax errors can impact profit margins that are already tight and risk fines and penalties.

Tax departments still spend significant time manually aggregating data from multiple systems, extending data, creating schedules, and preparing returns using spreadsheets. While raw transaction data required for filing is captured in back-office systems, these manual processes are the primary cause for low productivity and tax filing errors particularly for companies that need to file taxes in several jurisdictions.

Tax jurisdictions are continuously changing rules, rates, and forms. Tax departments are constantly challenged to stay up-to-date and adjust their processes to ensure tax accuracy. The result is that tax managers are consumed with monthly filing operations, and find it difficult to allocate time to analysis or other strategic projects.

Solution

Returns Excise Enterprise is a comprehensive solution for energy and motor fuel tax compliance, enabling tax departments to automate filing processes for all excise taxes, sales and use taxes, and terminal operator reports. Returns Excise Enterprise imports and transforms data from the back-office systems that track fuel transactions, eliminating the need for manual spreadsheet-based processes. Built-in tax rules incorporate city, county, state, and federal tax laws, enabling schedule determination and paper or electronic return generation for over 450 tax return types in the U.S. and Canada. Monthly tax updates ensure on-going compliance with regulatory changes.

Returns Excise Enterprise is the most widely deployed fuel tax automation solution in the U.S. and Canada. With comprehensive support for all major jurisdictions, hundreds of companies depend on it, from small single-jurisdiction filers to the largest oil companies processing millions of monthly transactions. Fuel industry tax professionals and tax jurisdictions alike, have come to trust Avalara to determine and file taxes accurately and reliably.

KEY BENEFITS

- **Improve tax filing productivity** by automating excise and sales tax returns within an integrated filing process and eliminating manual data collection and tax calculation
- **Reduce tax errors and risk of penalties** through automated data validation, built-in tax content, and timely tax updates
- **Reduce implementation time and cost** through available back-office integrations, built-in jurisdiction support, and flexible scenario-based architecture
- **Enable business agility** by making it easy to support new products, jurisdictions, or business partners
- **Reduce IT costs** by eliminating IT projects for tax reporting and by eliminating hardware and application management requirements through cloud-based deployment



Get started with Returns Excise Enterprise today.

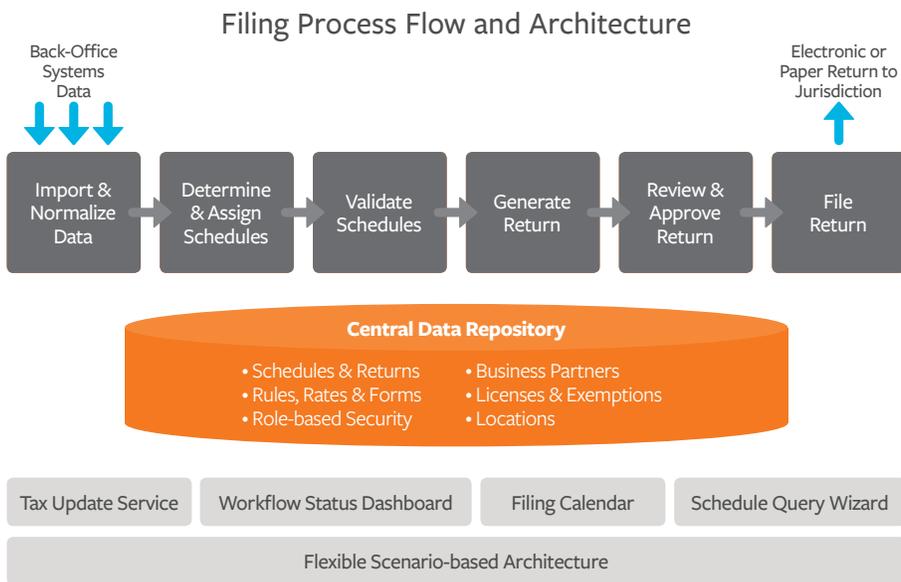
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Workflow automation and filing calendar

Returns Excise Enterprise uses customizable workflow to manage the filing process from the transaction import through review and approval, to the filing of returns and amendments. Using the Filing Calendar, tax managers can orchestrate their filing process around key internal and external dates. The Workflow Status Dashboard provides full visibility to the status of each return to ensure on-time filing. Workflow status can also trigger automated notifications so that swift remedial action can be taken when needed.

After data is imported, normalized and assigned to schedules, additional validation is performed to ensure that schedule data is consistent, complete, and accurate. This eliminates the potential for tax errors due to incomplete data or entry errors that can occur when manually fixing data.



KEY FEATURES

- **Comprehensive tax filing solution for downstream fuel** — Signature-ready tax return generation, including all motor fuel excise taxes, sales and use taxes, and terminal operator reports
- **Tax update service** — Monthly tax content updates ensure that new rules, rates, and forms are always available
- **Back-office integration** — Easily connects with ERP and fuel accounting systems
- **Flexible scenario-based architecture** — Built-in tax rules can be augmented or customized by tax preparers, without programming or IT involvement
- **Workflow automation and filing calendar** — Customize the filing process and ensure easy visibility of status, including transaction import, return generation, review, filing, acceptance, and amendment processes
- **Reporting** — Built-in reports and a flexible query wizard handles custom reports and data extracts for tax analysis, audit response, or customer support

Comprehensive coverage for excise and sales taxes

Returns Excise Enterprise supports over 450 excise tax returns and over 1,900 license and exemption types. In addition to motor fuel excise tax returns and terminal operator reports, support is provided for environmental, storage tank, and alternative fuel returns.

By leveraging Avalara's extensive expertise in sales and use taxes, the Returns Excise Enterprise filing process has been extended to support determination, calculation, and filing of sales and use taxes. Tax analysts now have a common automation platform for both excise and sales tax returns, reducing costs, simplifying the filing process, and improving productivity. In addition, calculating sales and use taxes as part of the filing process allows for reconciliation of calculated and accrued taxes, and through error detection, reduced audit liability.

The Tax Update Service provides monthly tax rule, rate, and form updates. Tax and IT departments no longer need to try to track regulatory changes to ensure tax calculations stay up-to-date. Avalara's team of tax experts constantly monitors jurisdictions for new tax regulations to ensure ongoing compliance.

Back-office integration

Complete tax automation requires tight integration to the back-office systems managing fuel transactions. Returns Excise Enterprise includes data integration with the most popular general and fuel accounting systems. This reduces the need for costly and time consuming custom development to integrate back-office data.

Returns Excise Enterprise uses tax scenarios to implement built-in and custom tax rules. Its unique and flexible scenario-based architecture enables tax rules to be defined and modified by tax preparers, without the need for programming. Tax managers can modify scenarios directly, allowing them to quickly adapt to new business requirements without the cost or lead-time typically required for new IT projects.

About Avalara – making sales tax less taxing

Avalara helps businesses of all sizes achieve compliance with sales tax and other transactional tax requirements by delivering comprehensive, automated, cloud-based solutions that are fast, accurate, and easy to use. Avalara's end-to-end suite of solutions are designed to effectively manage the complicated and burdensome tax compliance obligations imposed by state, local, and other taxing authorities in the United States and internationally.

Avalara is integrated with leading accounting, ERP, ecommerce and other business applications. Founded in 2004 and privately-held, Avalara's venture capital investors include Battery Ventures, Sageview Capital, Arthur Ventures, and other institutional and individual investors. Avalara employs more than 500 people at its headquarters on Bainbridge Island, WA and in offices across the U.S. and in London, England and Pune, India.



Getting started with Avalara Returns Excise is easy.

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