



**Select. Simplify. Scale.**

# **Your Ultimate Sales Tax Automation Checklist**

## *How to Future-Proof Your Tax Stack with Smarter Software*

Sales tax isn't just about rates and returns. It's a fast-changing compliance risk that quietly drains resources, introduces avoidable exposure, and steals time from already stretched finance teams. One wrong exemption, one misapplied rate, or one missed jurisdiction—and suddenly your team is cleaning up chaos instead of focusing on strategy.

The complexity isn't slowing down. States are updating taxability rules faster than ever. Your product catalog is evolving. Your business model is expanding across channels, geographies, and systems. And the spreadsheet-and-support-ticket approach? It doesn't scale.

Modern tax automation software can solve this. But only if it's built for the way your business actually operates—not bolted on to paper over the gaps.

The right solution won't just calculate tax correctly. It will streamline operations, reduce audit exposure, enable faster billing, and give your team confidence—not just compliance. But with every platform claiming to “automate tax,” how do you know which one can truly keep up with your complexity?

### **This guidebook is your go-to checklist for:**

- ✓ Spotting gaps in your current sales tax system
- ✓ Evaluating new software with confidence
- ✓ Making tax automation a strategic advantage, not just a compliance box

Whether you're a CFO, controller, or systems architect, this resource is built to help you simplify complexity—and scale tax with clarity.

# The 7 Signs You've Outgrown Your Tax Stack

Start here if you're not sure whether you need new software.

## You've likely outgrown your current system if...



**Spreadsheets are your backup plan.** Your team still fixes tax data manually post-transaction



**Certs are scattered.** Exemption certificates live in shared folders or email chains.



**Support is slow or non-existent.** Tickets take days. There's no one who understands your business.



**Nexus management is fuzzy.** You're unsure where you're collecting, or where you should be.



**Tax rules don't update themselves.** When a state changes sourcing logic or rate structures, your team has to find and fix it.



**You can't explain decisions.** If your CFO asks why a rate was applied, you cross your fingers before answering.



**Your team is reacting—not leading.** Too much time is spent cleaning up tax errors instead of focusing on strategy.

**Red Flag:** *If even two of these sound familiar, your tax software isn't just inefficient—it's a risk multiplier.*

The reality? Most platforms weren't built for the scale, complexity, or speed of modern finance. What worked when you were a \$10M business will fail when you're pushing \$100M. The cracks are already showing.

# Your Sales Tax Automation Checklist

Use this checklist to evaluate any sales tax solution—whether you're auditing your current provider or vetting a new one.

## Real-Time Tax Calculation

Your system should support sub-second tax decisions—at scale.

- Millisecond response time
- Handles multi-jurisdiction logic dynamically
- No latency even under high-volume loads
- Accurate taxability by line item, not just invoice total

## Intelligent Rules Engine

Your business isn't static—your tax logic shouldn't be either.

- Configurable by product, service, location, or channel
- Built to manage edge cases: bundles, subscriptions, drop-ship, SaaS, etc.
- Adapts as your revenue model evolves
- Includes sourcing rules, thresholds, and exemptions

**Tip:** Avoid systems that force you into rigid, pre-coded tax logic.

## Advanced Geolocation + Situs Determination

ZIP codes won't cut it. Rooftop accuracy is the new standard.

- Geospatial rooftop-level location mapping
- Correct tax jurisdiction selection every time
- Automatically adjusts for sourcing and taxability rules by state

## Exemption Certificate Management (SmartExempt)

Manual cert tracking is a liability waiting to happen.

- Real-time certificate capture at checkout or onboarding
- Built-in validation for formatting, expiration, and jurisdiction
- Centralized storage and version control
- Flags expired/missing certs before invoices go out

## Transparent Reporting and Reconciliation

If it's not traceable, it's not defensible.

- Line-level audit trail for every transaction
- Built-in nexus, exposure, and liability dashboards
- Easily exportable data for reporting or filings
- Drill-downs available by state, customer, or SKU

## Seamless Integrations

Tax should live inside your workflow, not outside of it.

- Native or API integrations with ERP, billing, eComm, CRM
- Pre-built connectors for Dynamics, NetSuite, Shopify, Salesforce, etc.
- Scales without rework as your systems evolve
- No-code or low-code integration options for faster deployment

## Scalability and Future-Readiness

What works at \$10M ARR may break at \$100M.

- Single platform for sales tax + use tax
- Supports multi-entity, multi-channel, and multi-currency setups
- Handles new product lines, regions, or business models without custom builds
- Continuous regulatory updates—no manual patching required

## Reliable, Expert Support

Sales tax is too complex to navigate alone.

- Dedicated account manager who knows your industry
- Responsive team (not bots) with deep tax knowledge
- Proactive check-ins during critical times (filings, audits, expansions)
- U.S.-based support with fast SLAs

**Ask Yourself:** *If you had a tax emergency tomorrow, would your current provider show up?*

# What Great Tax Automation Looks Like in Action

Let's be real: you don't just want software that works—you want software that works better than what you have now. Here's what that looks like.

## Before CereTax:

- Tax decisions had to be manually overridden in the ERP
- Invoices were delayed due to exemption cert issues
- Sales tax logic had to be updated manually across systems
- Reporting lacked transparency, forcing audits into fire-drill mode
- Teams wasted hours reconciling inconsistent tax data

## After CereTax:

- Tax decisions happen in real time, at line-item precision
- Certificates are validated before invoices go out—no surprises
- Tax rules update automatically, across all states and product types
- Full audit trails are baked in, with every rate and rule cited
- Billing happens faster, and finance teams spend more time forecasting, not fixing

**Result:** Zero errors, faster billing, and a tax stack that scales with your business.

And it's not just about automation. It's about control, clarity, and confidence. Your tax platform should give your team leverage—not more to manage.

## Final Scorecard: Are You Ready to Automate?

Capability	Current System	CereTax
Real-time tax decisions	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Line-item logic with sourcing rules	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Rooftop-level geolocation	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Line-item logic with sourcing rules	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Transparent, auditable reporting	<input type="checkbox"/> Yes <input type="checkbox"/> No	
ERP + eComm integration	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Scales with business growth	<input type="checkbox"/> Yes <input type="checkbox"/> No	

## What to Do Next?

If you've made it this far, chances are your current stack isn't cutting it. Here's how to move forward:

### 1. Run this checklist with your team.

Use it in a working session to assess your current tools, surface known issues, and map your ideal state. Treat it like a diagnostic tool—not just a list.

### 2. Pinpoint what's slowing you down.

Is it manual overrides? Exemption certs? Reporting bottlenecks? Identify the gaps that are costing you the most time, money, and energy.

### 3. Talk to a tax automation expert.

Our team at CereTax works with companies in SaaS, telecom, manufacturing, and energy to modernize their tax stack—without disruption. We'll help you pressure-test your current system, spot blind spots, and show you what good can look like.

## Ready to take control of your tax automation journey?

Grab your copy of the Sales Tax Automation Checklist to see where your tax tech falls short—or talk to a sales tax expert who can help you fix it.

Talk to a Tax Expert →