

Welcome Pack | EXTERNAL

Concur[®] Tax Assurance by Blue dot: Let's Get You Started

Improve your compliance with global tax regulations
— and maximize your VAT reclaim.

THE BEST RUN



Overview

Tax Assurance
at a Glance

Concur Tax Assurance by Blue dot at a Glance

Concur Tax Assurance by Blue dot uses sophisticated AI algorithms and up-to-date tax knowledge to capture, analyze, and enrich the data in 100% of Concur Expense transactions – digitizing your compliance process and maximizing recovery. You'll benefit from:



Reduced Compliance Risk

- Avoid fines and audits with improved accuracy and awareness of regulations
- Indemnity against fines and penalties



Maximized Profitability

- Increase hard savings
- Reallocate savings to areas of business that matter most
- **Extra Add On:** Address missed opportunities with Historical Tax Reclaim



Increased Operational Efficiency

- Simplify the complicated reclaim process
- Potential headcount savings
- Improve traveler experience and efficiency

Overview

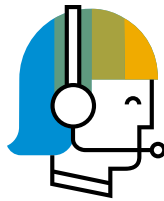
Dedicated Personal Help

You'll Get Dedicated Personal Help, Every Step of the Way



Personalized Support

Once your Concur Tax Assurance solution has gone live, your dedicated SAP Concur representative will be in touch by e-mail.



Easy Access to Advice

They can answer questions and provide advice to your team members assigned as administrators for Concur Tax Assurance.



Overview

How it Works

Here's How It Works

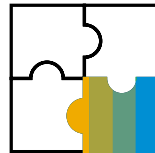
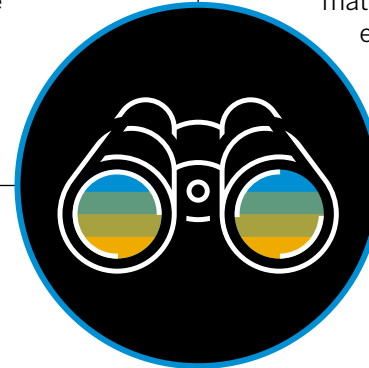


Easy Uploads

Your users upload their expenses to Concur Expense as usual. The expense process workflow continues as usual while Concur Tax Assurance gets to work in the background.

Automated Validation

The solution eliminates the presence of human error by automating the extraction, matching, and validation of every invoice.




Accurate Analysis

Concur Tax Assurance automatically checks every invoice for compliance, as well as the eligibility of both domestic and foreign VAT reclaim.

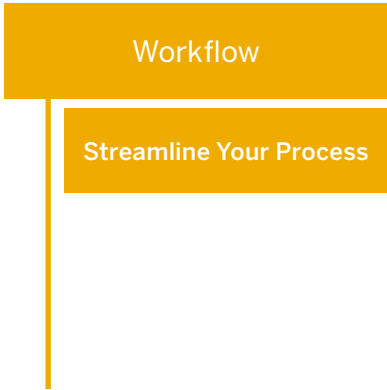
The Outcome

- Optimal savings
- Enhanced compliance
- Improved analytics
- Better user experience

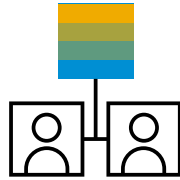


 Discover how Concur Tax Assurance by Blue dot optimizes data integrity to help organizations comply with global tax regulations.

[Listen Now](#)



How Concur Tax Assurance Streamlines Your Process



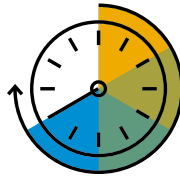
Consolidated

Multiple data sources and processes are unified in a single workflow, giving you a single access point for global and local management across all entities and jurisdictions.



Accessible

All relevant invoices and receipts are digitalized and accessible in near real time. You'll access valuable reports, instant record retrievals, detailed audit trails and more.



Streamlined

Country-specific rules are embedded in the solution, so there's no need for tax tables. Plus, you get a streamlined audit process which is fully compliant.

Workflow

Increase Confidence
in Compliance

Enhanced Confidence in Your Compliance



Global Tax Expertise

You have access to tax experts – with intricate knowledge of regulations around the globe – who will work on your behalf to fulfill inquiries from tax authorities.



Indemnification

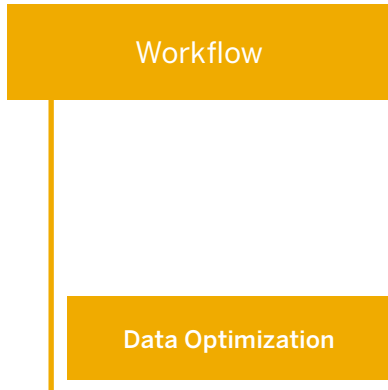
You are indemnified against fines and penalties in the event incorrect data is reported.*

* Applies to domestic tax only.



Transactional Model

The monthly fee ensures no conflict of interest and 100% of recovered VAT/GST stays with your business.



Optimizing Data and Making Sure You Don't Lose Out



Always Up-To-Date Global Rates

The dynamically updated rates and rules engine enables access to current indirect VAT/GST rates, rules and data postings.*

* Concur Tax Assurance by Blue dot technology country coverage extends to over 96% of the identified VAT/GST/HST potential in the Americas, EMEA and APAC regions.



Tax Receipts and Refund Validation

The solution contacts your suppliers and vendors to recover original tax receipts, where missing, for big ticket expense items such as hotels, events, and car rentals to maximize your tax reclaim.



Up-To-Date Knowledge Base

With more than 4.6 million vendors registered in the Blue dot database, we have several pre- and post-matching tools as well as secondary computer sampling, which constantly refines the accuracy of our extraction and validation.

Reclaim and Optimization

With the Reclaim and Optimization add-on, you can maximize VAT reclaim with functionality including:

- Arranging the re-issue of incorrect invoices
- Managing the filing and reclaim process of non-domestic tax reclaim between EU (D8) and Non-EU business (D13)



Historical Tax Reclaim

With the Historical Tax Reclaim add-on, we can:

- Analyze up to five years of Concur Expense reports, depending on regulations
- Analyze tax filings to reclaim any previously un-reclaimed taxes due to your organization



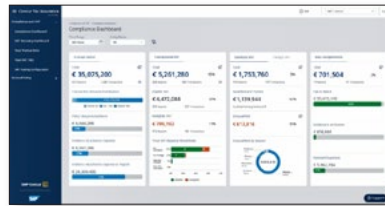
Seeing the Big Picture – Viewing the Results



With a comprehensive reporting dashboard, you'll be able to cross-reference areas like supplier spend and compliant and non-compliant spend to discover additional tax saving opportunities.

Results

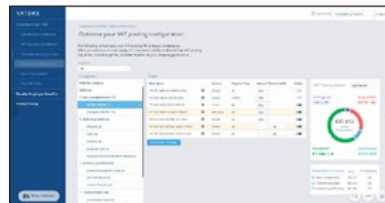
Viewing the Results



Compliance Dashboard



Disqualifying Analytics



Optimize VAT Posting Configuration

Examining Individual Invoices



- Drill down into individual receipts to **analyze issues**
- Automatically request new or missing invoices to **correct records**

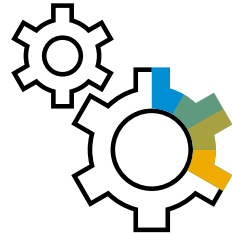
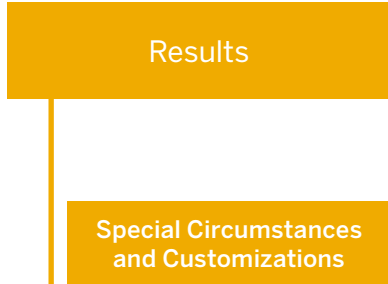
For Existing Customers with Standalone Expansions



- Include the name of your tax contact as “Client Project Lead”
- Include e-mail address (must have) and phone number (if available)

Allowing for Special Circumstances and Customizations

With this fully customizable service, you can:



Configure tax rules for specific tax recovery interpretations.

The default will always be best-practice templates. Customer-specific changes are excluded from indemnification.



Filter and select only the transactions that are in scope to be processed.

There are some limitations. For example, you cannot limit expenses at the employee level, but they can be filtered later to disregard items that are not relevant to the inquiry.

Thank You

With Concur Tax Assurance by Blue dot we hope you can free up resources for more value-added activities, while we help you to improve compliance and maximize reclaim.

Ongoing Support

Got a question or need advice? Just ask your SAP Concur representative.

Systems Issues

View the [support page](#) to raise a case and/or ask your Service Coordinator.

Contact Us



If your SAP Concur representative is unable to help, your question will be passed on to the global tax experts at Blue dot for resolution.

Did you know?

The target response time for Blue dot is within one working day of receipt from SAP Concur Admin Support.*

*N.B. Target response time, not resolution time.

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