SAP Concur

Welcome Pack I EXTERNAL

Concur® Tax Assurance by VATBox: Let's Get You Started

Congratulations. You're on the way to continued business innovation with our VAT compliance solution.

Let's help you improve your compliance with global tax regulations — and maximise your VAT reclaim.

Service | Workflow | Results

You're in Safe Hands with SAP Concur Solutions

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

Reduced compliance risk

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

Maximised profitability

- Increase hard savings
- Reallocate savings to areas of business that matter most
- Address missed opportunities with Historical Tax Reclaim

Extra add on

Increased operational efficiency

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

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

Personalised support

Once your Concur Tax Assurance solution has gone live, your dedicated Customer Success Executive (CSE) will be **in touch by e-mail** to introduce themselves.

Easy access to advice

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

How Our Service Works, at a Glance

Easy uploads

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

Automated validation

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

Accurate analysis

VATBox 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 VATBox optimises data integrity to help organisations comply with global tax regulations.

Listen now

Thank You

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

Essential Contacts if You Need Us

Ongoing support

Got a question or need advice? Whether you're experiencing a system issue, or just need some everyday support to utilise the Tax Assurance by VATBox solution, just ask your Customer Success Executive.

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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 digitalised 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.

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 fulfil 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.

Optimising 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.*

* VATBox 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

VATBox 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 maximise your tax reclaim.

Up-to-date knowledge base

With over 4.6 million vendors registered in the VATBox database, we've several pre- and post-matching tools, as well as secondary computer sampling which constantly refines the accuracy of our extraction and validation.

Reclaim and Optimisation

With the Reclaim and Optimisation add-on, you can maximise 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:

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

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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**.

Your Compliance Dashboard

Disqualifying Analytics

Optimise VAT Posting Configuration

Looking Closely at Individual Invoices

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

If you have any questions, simply reach out to your dedicated Customer Success Executive via phone or email.

If your Customer Success Executive is unable to help, your question will be passed on to the global tax experts at VATBox for resolution.

Did you know?

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

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

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 Customisations

With this fully customisable service, you can:

Configure tax rules for specific tax recovery interpretations.

The default will always be VATBox's 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.

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