

# 2019 FALL

## CUSTOMER SUCCESS REPORT



### TAX COMPLIANCE SOFTWARE CATEGORY



An aerial photograph of a city skyline at dusk or dawn. The sky is a mix of light blue and orange. Numerous skyscrapers are visible, some with their lights on. In the foreground, a large, modern building with a flat roof and many windows is prominent. The overall scene is a dense urban environment.

# TAX COMPLIANCE SOFTWARE OVERVIEW

Tax compliance software gives you accurate federal and local tax computations, and automates tax filing and reporting. Top vendors present different solutions to manage specific types of transactions and their linked taxes. Sales tax compliance programs compute and process relevant taxes to be charged across jurisdictions. Further, Value-Added Tax (VAT) applications monitor regulations and automate computations across intricate scenarios. Advanced tax compliance tools support custom tax management for global sales. Many vendors also deliver managed audit reporting and tax filing for businesses of all sizes.

Apart from the above features, tax compliance systems also help to handle other tax-related work like audit reporting, tax data analytics, returns processing with compliance with multiple jurisdictions, e-way bill tracking and processing, and exemption certificate management and search.

# Customer Success Report Ranking Methodology

The FeaturedCustomers Customer Success ranking is based on data from our customer reference platform, market presence, web presence, & social presence as well as additional data aggregated from online sources and media properties. Our ranking engine applies an algorithm to all data collected to calculate the final Customer Success Report rankings. The overall Customer Success ranking is a weighted average based on 3 parts:

**Content Score** is affected by:

1. Total # of vendor generated customer references (case studies, success stories, testimonials, and customer videos)
2. Customer reference rating score
3. Year-over-year change in amount of customer references on FeaturedCustomers platform
4. Total # of profile views on FeaturedCustomers platform
5. Total # of customer reference views on FeaturedCustomers platform

**Market Presence Score** is affected by:

1. Social media followers including LinkedIn, Twitter, & Facebook
2. Vendor momentum based on web traffic and search trends
3. Organic SEO key term rankings
4. Company presence including # of press mentions

**Company Score** is affected by:

1. Total # of employees (based on social media and public resources)
2. Year-over-year change in # of employees over past 12 months
3. Glassdoor ranking
4. Venture capital raised

## Customer Success Report Award Levels



### Market Leader

Vendor on FeaturedCustomers.com with substantial customer base & market share. Leaders have the highest ratio of customer success content, content quality score, and social media presence relative to company size.



### Top Performer

Vendor on FeaturedCustomers.com with significant market presence and resources and enough customer reference content to validate their vision. Top Performer's products are highly rated by its customers but have not achieved the customer base and scale of a Market Leader.



### Rising Star

Vendor on FeaturedCustomers.com that does not have the market presence of Market Leaders or Top Performers, but understands where the market is going and has disruptive technology. Rising Stars have been around long enough to establish momentum and a minimum amount of customer reference content along with a growing social presence.



# 2019 Customer Success Awards

Check out this list of the highest rated Tax Compliance Software software based on the FeaturedCustomers Customer Success Report.



**SOVOS**  
SOLVE TAX FOR GOOD™

 **TaxJar**®

 **VERTEX**®



**canopy**

 **csc**  
**corptax**®

**VATBOX**



**DAVO**

 **Quaderno**

 **TAXIFY**  
by SOVOS

# OVERALL BEST

OF TAX COMPLIANCE SOFTWARE



 **VERTEX<sup>®</sup>**



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### ABOUT VERTEX INC.

Vertex Inc. is a leading tax software and services provider that empowers global commerce. Vertex connects customers and partners across all industries to deliver the world's most trusted tax solutions for businesses to grow with confidence. Vertex provides cloud-based and on-premise solutions that can be tailored to specific industries for every major line of indirect tax, including sales and consumer use, value added and payroll. Headquartered in Pennsylvania, and with offices worldwide, Vertex is a privately held company that employs over 1,000 professionals and serves companies across the globe.

# 65

Customer references from happy Vertex Inc. users

[VIEW ALL REFERENCES](#)

CONA is at the forefront of evolving POS models required to compete in the modern retail world, supporting Coca-Cola's mission-critical bottling business operation. Accurate tax calculations are combined with complete end-to-end reconciliation of high transaction volumes and broad jurisdictional coverage to deliver superior business services.

Susan Laughrey

P & S Solution Architect, CONA Services

Vertex was a great partner to have when choosing a tax solution.

Daniel Meyer

SAP Business Analyst, Summit Electric Supply Co

Together, Vertex and DMA provided a win/win solution for Siemens. Completing the massive task of exemption migration and multiple systems migration allowed for the implementation of a state of the art, enterprise tax solution that could adapt to our diverse ERP landscape and provide the tax team the control and functionality to further drive...

Sandra Blair

Tax Director, Siemens

"We're a strong believer in Vertex Cloud for its functionality, flexibility, and cost. We've improved efficiency and reduced our audit exposure."

Ryan Briggs

CFO, Espresso Services



# 2019 MARKET LEADERS







# SOVOS

SOLVE TAX FOR GOOD™

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## ABOUT SOVOS

Sovos brings together the world's most accurate and reliable regulatory analysis with a global cloud software platform built to reduce the burden and risk of tax compliance and business to government reporting everywhere your business grows. Trusted by over half of the Fortune 500, Sovos delivers the world's most reliable, stable and secure solutions ahead of regulatory change.

# 71

Customer references from happy Sovos users

[VIEW ALL REFERENCES](#)

“Sovos CertManager is a very user-friendly system that is saving us time and effort, not only making exemption certificate management a much more efficient process, but I believe will continue to reduce our audit costs.”

Andrew Snowden  
Controller, Bridgestone HosePower

“We always strive to create an exceptional trading experience that both protects and benefits our customers. Sovos takes away the complicated guesswork of crypto tax reporting, helping us and our clients to be compliant.”

Andrew Chang  
Chief Operating Officer, Paxos

“Because Sovos provides the network upgrades as well as the SAP ERP configurations, we have been able to work with one vendor across multiple countries and confidently manage the changes to Brazil's Nota Fiscal and Mexico CFDI's legislation.”

Randy Isdahl  
Director, SAP Process Architecture, Brown-Forman

“There's just no way you could manually do 1099 reporting. With Sovos, we're able to check the federal tax ID numbers ahead of time, so I don't know that we've gotten any B notices in the last several years.”

Sharon Huskins  
Staff Accountant, The Quartz Corp



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## ABOUT TAXJAR

TaxJar is the leading technology solution for busy eCommerce sellers to manage sales tax and is trusted by more than 7,000 businesses. TaxJar was founded to help eCommerce merchants spend less time on sales tax and more time growing the businesses they love. TaxJar is passionate about creating simple solutions and leveraging technology to solve complicated sales tax issues.

# 45

Customer references from happy TaxJar users

[VIEW ALL REFERENCES](#)

"Making the complex and tedious simpler and seamless. The overall ease of use and UI/UX are complimented with great customer support. We saved significant time by getting informed, succinct answers from the customer team at TaxJar."

Raghu Kakarala  
Managing Partner, FortyFour

"This TaxJar app uses the new NetSuite SuiteTax API to seamlessly sync your sales transactions to TaxJar for sales tax compliance reporting and filing. The integration is easy to use and understand."

Chief Executive Officer  
NetSuite

"TaxJar provides a very simple service that saves me hundreds of dollars a year. Now I don't worry at all about filing my sales tax. Huge headache alleviated."

Coffee Joulies

"We couldn't be more excited to partner with TaxJar! Their solution takes the headache out of tax for store owners. It's easy to use, affordable and it just plain works."

Paul Maiorana  
Vice President, WooCommerce



# 2019 TOP PERFORMERS



*corptax*<sup>®</sup>

canopy

VATBOX



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### ABOUT CSC CORPTAX

CSC Corptax transforms the business of tax through technology, business process expertise and award-winning customer support. Clients achieve breakthrough tax performance using the first and only single system on the market offering unmatched automation to align processes and workflows, enhance transparency, improve accuracy, and lower risk across the corporate tax lifecycle. For more than 40 years, Corptax products have supported the evolving tax needs of leading organizations in many industries. Today, Corptax solutions help almost 1,000 clients in 100 countries, including 50% of the Fortune 500 and 60% of the Fortune 100, nationally.

# 52

Customer references from happy CSC Corptax users

[VIEW ALL REFERENCES](#)

“Corptax invests heavily in technology to ensure customers have the greatest efficiency at their fingertips. Users can then utilize data in the system for other functions.”

Craig Stier  
Manager, International Tax, Kimberly-Clark

“Automating dataflow between three financial/tax systems via Corptax Office means less data entry, review time and frustration, and more time to assess tax positions and savings opportunities for the company. Plus, reviewing data on a consolidated rather than individual basis saves even more time.”

Hamadi Bengabsia  
Vice President of Process & Tax Technology, CBS

“A major benefit of Corptax architecture is the speed of calculations and the visibility we get to those calculations to do our analysis.”

Denise Vincent  
Tax Director, Nationwide

“With the Corptax Single System, work that took 6 people plus consultants to complete now takes 4 people and no consultants. The reduction in cost and risk helps everyone sleep easier.”

James Dippolito  
Tax Manager, Deutsche Post DHL Group



# canopy

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## ABOUT CANOPY

Canopy is building sophisticated, cloud-based software to make resolving IRS collections easier on tax professionals and their clients. It allows effortless gathering of client information and documents, robust tax analytics, auto-completion of tax forms, and more.

# 17

Customer references from happy Canopy users

[VIEW ALL REFERENCES](#)

“After less than three months of using Canopy, I had streamlined my process to the point that I could add \$10,000 in monthly recurring revenue.”

James Faughtenberry  
The ATA Group

“Canopy lets me work so much faster and makes me so much more productive - Canopy saves me at least an hour every time I pull a transcript.”

Sharise Nobles  
Nobles Bookkeeping

“Filling out mountains of paperwork is stressful for clients, so Lewis Hurwitz implemented a solution: Canopy’s collections workflow.”

Lewis Hurwitz  
Owner, Hurwitz Tax Solutions

“We talked to Emilia McAfee of We Legal, APC in Corona, CA about how choosing the right software made training and onboarding her staff easy.”

We Legal, APC



# VATBOX

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MONSANTO



## ABOUT VATBOX

VATBox offers peace of mind with their automated cloud-based technology. Recover VAT with complete compliance and genuine governance. Their state-of-the-art patented technology puts companies in control, providing total transparency and insight into all employee travel and expense transactions, foreign account payables, shipping (DDP), and all other invoices automatically identified with reclaimable VAT. Their simple-to-use dashboard offers drill-down analytics, effortlessly streaming compliant data from all VAT receipts and submitting VAT reclaims to the relevant authorities. Built by smart, passionate software engineers and VAT experts, their hassle-free solution minimizes overheads and maximizes refunds on domestic and foreign VAT.

# 25

Customer references from happy VATBox users

[VIEW ALL REFERENCES](#)

"With a direct connection between Teva's Expense Report and VATBox, we successfully minimized the time we needed to spend on VAT procedures and maximized our VAT potential outputs, leading to excellent results."

Senior Director of Global Tax  
TEVA

"We chose VATBox because we want to optimize our VAT reclaim process, simplify the administrative processes for our finance departments and to increase the compliance of our T&E invoices."

Marcel de Wit  
Vice President Global Tax & Treasury, BCD Travel

"We chose VATBox as our preferred solution in order to have one unified process for the recovery of VAT over specific jurisdictions. For us, VATBox means Governance & Disruptive innovation."

Global Head of Indirect Tax  
Kuehne + Nagel

"Monsanto has truly leveraged the partnership between VATBox and Concur. It helped us become more productive with VAT refunds, and resulted in higher yields from our VAT recovery process."

Bas de Koning  
EME Indirect Tax Specialist, Monsanto





**DAVO**

 **Quaderno**

 **TAXIFY**  
by SOVOS



# DAVO

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STEAMBOAT FLORAL



### ABOUT DAVO TECHNOLOGIES

DAVO Technologies has developed a suite of applications to provide automated solutions to merchants' sales tax and cash management needs. DAVO Technologies Sales Tax is the only automated sales tax solution available with daily cash management. DAVO Technologies automatically collects sales tax daily and files and pays it when due. DAVO Technologies patented technology is trusted by thousands of brick and mortar merchants to automate their sales tax from start to finish. The DAVO Technologies Sales Tax app integrates with cloud based Point of Sale (POS) systems and guarantees on-time and in-full sales tax filing and payment for its merchant customers. DAVO Technologies offers a suite of payments products to help brick and mortar merchants with cash management—DAVO Technologies Sweep & Save, DAVO Technologies Savings Club and DAVO Technologies FranchisePay.

# 10

Customer references from happy DAVO Technologies users

[VIEW ALL REFERENCES](#)

“DAVO takes the stress out of paying sales tax. With DAVO, we know our cash flow, pay our taxes daily, and never have to think about being in compliance with state law. This is one of the most essential services we use to run our business.”

Elizabeth Turnbull  
Co-Owner, COPA

“Using DAVO Sales Tax app has transformed the business. Knowing that our sales tax is always set aside and paid on-time has been life changing. There are many apps available, but none are as important as DAVO. I would never consider any POS system that does not have DAVO, and I recommend DAVO to everyone I know who either owns or is...”

Michael Martinez  
The Rolling Pin Bake shop

“DAVO is the best thing that ever happened for small businesses.”

Hawkins House of Burgers

“DAVO truly changed my life. I expended so much emotional energy worrying about sales tax all the time and now I don't even think about it.”

Gina Knochenmus  
Owner, Steamboat Floral



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## ABOUT QUADERNO

Quaderno provides automatic tax compliance for SaaS, eCommerce, and digital businesses worldwide. From US sales tax to VAT to GST, merchants can effortlessly comply with tax laws in any country. Quaderno offers automatic invoicing, instant tax reports, a variety of useful integrations, and great customer support. They want to help business owners customize Quaderno to their business, to solve their particular problems and reflect their own brand.

# 12

Customer references from happy Quaderno users

[VIEW ALL REFERENCES](#)

"I like being able to combine multiple invoices into one PDF so you can go through your customer's entire history. Tick all the boxes and it would generate a PDF for the whole time they have been with you. It's really a time saver."

Murat Mutlu  
Co-Founder and Product Designer, Marvel

"Quaderno was, and still is, the solution I needed to solve all my VAT compliance woes. Brilliant product. Exceptional team. Stress reduction accomplished!"

Sam Hurley  
OPTIM-EYEZ

"Quaderno helped us a lot to work more efficiently by automatically creating Shopify and Amazon invoices. Furthermore, the service is great. Whenever we need something special, we just write an email to their support center and a few minutes later, we receive a reply."

Stefan Lehrer  
SunnyBAG

"Automatic invoices were never so easy. Easy to set up and it works perfectly with WooCommerce. 100% Recommended."

Antonio Cantero  
Woodemia



## TRUSTED BY



## ABOUT TAXIFY

Taxify saves online sellers time and money by keeping them in compliance with sales tax reporting and remittance. Taxify can report for every state and local jurisdiction - on an easy-to-use, self-service software platform that any business can afford. Taxify makes it easy to comply with thousands of tax rules and rates, giving internet retailers, including Amazon sellers, an easy way to accurately calculate tax, avoid tax gaps and automatically file state and local tax forms.

# 17

Customer references from happy Taxify users

[VIEW ALL REFERENCES](#)

"I love Taxify, they have put to rest any ambiguities that I may have had. It was a bit of a process handling all the monthly, quarterly, six month or yearly State tax remittance. They took that burden off of me and put it on them. So far I feel like a huge weight has been taken off my shoulders. It is a field that you do not want to mess around in and they..."

Michael  
Record Peak

"Taxify is a partner to eCommerce businesses and accountants to manage the mechanics of the complex world of sales tax compliance in the 21st Century. They take on this dirty job so you can focus on growing your business. We couldn't scale our business or deliver as much value to our eCommerce customers without Taxify as a partner."

Scott Scharf  
Catching Clouds

"Our monthly filings would take a whole day. Now, using Taxify, it takes minutes."

Rainier Arms

"Taxify is the perfect solution for our online business. It properly manages sales tax issues along with compliance."

Zenbio