

MAXIMIZING YOUR USE OF AVALARA PROPERTY TAX

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ABOUT AVALARA

Avalara makes tax compliance faster, easier, more accurate, and more reliable for 41,000+ business and government customers in over 75 countries. Tax compliance automation software solutions from Avalara leverage 1,200+ signed partner integrations across leading ecommerce, ERP, and other billing systems to power tax calculations, document management, tax return filing, and tax content access.

Visit avalara.com to improve your compliance journey.

Introduction

Avalara Property Tax is a next-generation, cloud-based property tax management solution built to solve compliance challenges facing industry-leading enterprises and growing businesses. It helps save time, reduce costs, and improve compliance by automating tasks like data entry and returns preparation.

Avalara Property Tax is ideal for enterprises and midsize businesses that need a secure, comprehensive property tax management solution. The solution prepares and generates property tax returns. Avalara Property Tax provides a centralized hub for storing real and personal property tax bills, assessment notices, and forms. The solution provides businesses an easier way to track due dates, manage appeals, and create reports.



Getting the most out of Avalara Property Tax begins with implementation. Avalara offers support to get you up and running quickly and for as long as you're using Avalara Property Tax. When you choose Avalara Property Tax, your company can experience benefits as soon as implementation concludes. The implementation schedule is roughly the same for small, midsize, or enterprise businesses.



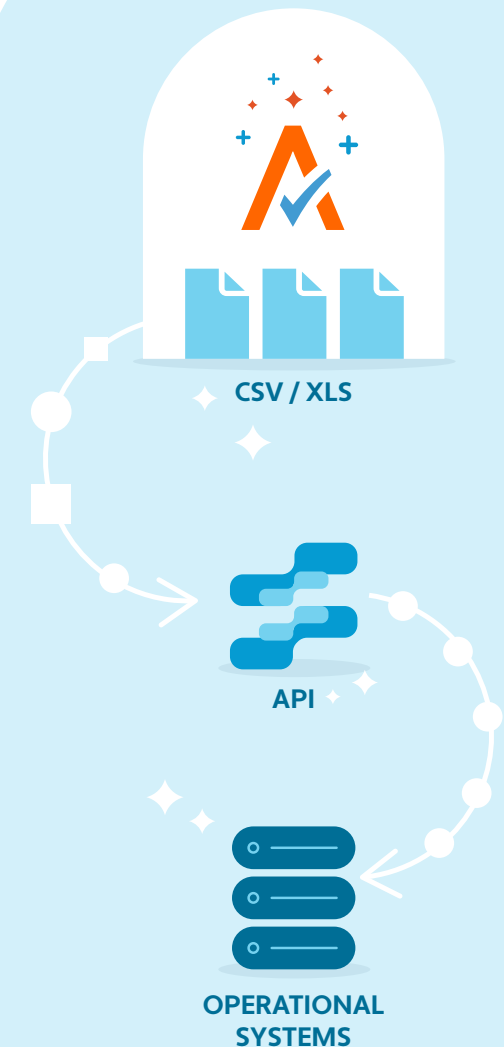
[Avalara Property Tax Returns Pro](#) is a great choice for smaller businesses looking to streamline the process of preparing personal property tax returns, while improving accuracy. The cloud-based solution provides customizable, signature-ready forms and built-in mapping guidance for asset classification, useful lives, trend factors, taxability, reportability, and form mapping. Once your business has prepared and generated your returns with Avalara Property Tax Returns Pro, they're ready for you to download, print, and mail. Self-guided onboarding allows your business to learn the system anytime from anywhere you're connected to the internet. Embedded support is available from the Help Center.

Integrate Avalara Property Tax with your business systems

Data and automation power business. When technology platforms are incompatible, it disrupts operations and burdens IT teams and end users. Choosing a property tax automation solution that integrates with your existing tech stack helps avoid these problems.

If you don't have the IT staff to build an API integration, you can sync data to Avalara Property Tax with automatic CSV or Excel file transfers.

Dedicated support and onboarding help make Avalara Property Tax integration as smooth as possible. One of the biggest benefits of a cloud-based property tax compliance solution is that once it's set up, you typically just need a web browser.



Protect your data with rigorous security and privacy standards

Avalara prioritizes data security with robust encryption, stringent access controls, and continuous monitoring to protect customer information against cyber threats. Avalara Property Tax is SOC 1 Type 2 compliant. By following global standards and regulations Avalara ensures that tax compliance data is handled with the utmost security and privacy.

With a dedicated security team and advanced technologies, Avalara delivers peace of mind, allowing businesses to focus on growth while trusting your compliance data is secure.



Grow your business with Avalara Property Tax

Avalara Property Tax scales with your company as it grows, supporting unlimited users, legal entities, and property locations in the United States while putting you in a position to seize opportunities now and in the future.

As your company expands into new jurisdictions, you can add new properties and corresponding assessor and collector accounts. You can store additional property details such as a description, open and close dates, and incorporation information. You can also add accounting fields such as general ledger and cost center.

Avalara Property Tax is ideal for companies that have entered into a merger or acquisition. The solution offers features that make submitting accurate returns the first time you file after one of these events easier and those that help you manage property tax going forward.

As your company grows, [Avalara Business Licenses](#) can help you obtain the business licenses you need and get registered to collect and remit sales and use tax in new jurisdictions.



Setting up Avalara Property Tax

When implementing any new software, it's comforting to have a helping hand. Avalara provides your business with customized setup and implementation support combined with hands-on training.

During setup, your company will gather the information that will be put into Avalara Property Tax. For example, you'll need the addresses of your real estate locations, a list of your tangible personal property assets, and details about accounts you have with assessors and collectors.

Your implementation coordinator will show you how to enter this information into our Excel templates then import the files into Avalara Property Tax through bulk uploads. The solution will validate all data and flag any validation errors. Your implementation coordinator will teach you how to clear any errors then import

the corrected file for revalidation. They'll guide you throughout this process to make sure your data is imported and formatted correctly.

Avalara provides mini training sessions throughout implementation as well as formal instruction when you'll learn how to perform various tasks within Avalara Property Tax. Our training is customized much like the rest of the implementation process. It considers the size of your organization and of your tax team, how many team members will be involved with the implementation (and to what degree), and the learning needs of participants. We can deliver training in a multitude of ways – pre-recorded videos, live conference calls with screen-sharing, and even in person.

Lastly, we help ensure you're set up for success by sharing best practices.



Manage property tax documents

A survey by Potentiate and Avalara found that 56% of enterprises who responded receive between 500 to 10,000 property tax bills annually. Avalara Property Tax helps you stay organized and audit-ready.

As blank returns, assessment notices, and tax bills come in, upload them as PDFs into the system. Avalara Property Tax uses one of the best-in-class optical character recognition (OCR) technologies to automatically extract account numbers, addresses, and due dates from hundreds of documents and triple validate them for accuracy. The solution associates scanned data with the designated account and identifies data that doesn't have an associated account. Two additional levels of extractions – including verification by humans – help ensure data is correctly uploaded and linked to the appropriate accounts.

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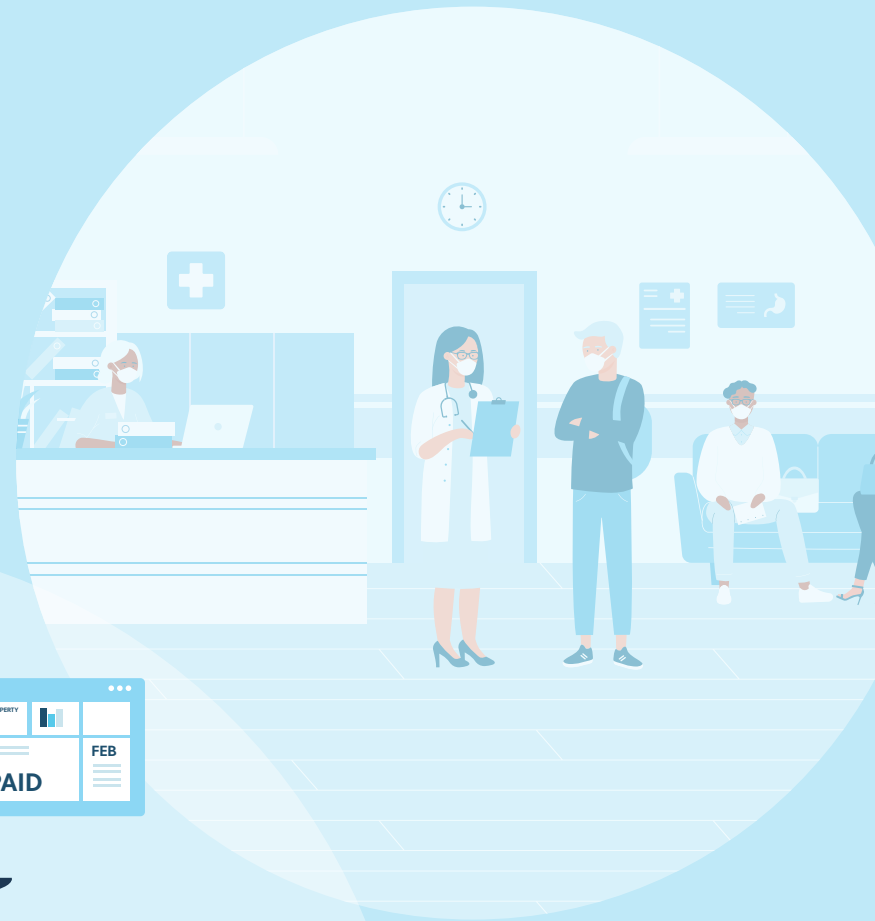


HOW AVALARA CAN HELP

Diego is the finance manager at a health care organization.

The organization tracks property tax assessment notices in Excel. This task requires an intern to manually key in due dates and add them to a wall calendar.

After implementing Avalara Property Tax and receiving hands-on training, the health care organization is able to scan all property tax notices and track appeal dates using the solution's calendar.



Stay on top of filing and payment deadlines

It's important to meet filing and payment due dates to avoid late fees and penalties.

Avalara Property Tax includes a handy calendar to help ensure you never miss a deadline and enable you to take advantage of discounts for filing early. The calendar shows you when your returns are due and updates automatically as you file them. It also alerts you to payment deadlines and upcoming appeals hearings. If you're in a crunch situation and unable to meet a filing deadline, you can update the due date to reflect any extensions allowed by the assessor.



HOW AVALARA CAN HELP

Mira is the property tax manager for a retailer with brick-and-mortar locations.

Her business receives property tax bills from many jurisdictions. Mira recently missed a payment deadline because a tax bill was sent to the wrong address.

Mira needs a way to keep up with due dates despite unforeseen circumstances. She chooses Avalara Property Tax to remind her of upcoming deadlines and help ensure she avoids penalties for late payments.



Automatically generate your returns and remit tax

When you're ready to file, go to the **Prepare returns** screen to search for your assessor accounts and begin the filing process. Avalara Property Tax provides immediate access to forms across all assessing jurisdictions in the U.S. Jurisdictional data, forms, and rules are validated annually to save you time and improve accuracy.

Avalara Property Tax allows you to file consolidated returns for counties that prefer them. For example, if you have 15 accounts with a county, you can create a master account with sub-accounts in Avalara Property Tax. This feature will produce one return while allowing you to maintain the granularity required to track your assessments.

Avalara Property Tax maps your assets to more than 500 state and county depreciation schedules that are validated annually. Drill

down to find out the depreciation factors used by asset vintage year. You can also create custom depreciation schedules and compare the state's schedule to your own. This information allows you to calculate a fair market or rendered value to report to the assessor. Once your assets have been depreciated, view the total reported costs and rendered values.

After reviewing the prepared return cost and values, approve the returns for filing. The system will then create each return. You can include attachments and a standardized cover letter, create a customized cover letter for your business, and add a digital signature. The return generation process occurs in the background, so you don't need to wait and the system won't time out when multiple returns are being created. A progress bar shows the completion percentage.

Then it's time to send your returns to the assessor. With a separate Anybill account seamlessly integrated with Avalara Property Tax, returns and checks can be printed and mailed for you. You can also send your returns yourself. Search for your filed returns, download returns in bulk, and generate assessor address labels on the **Package tracking** screen.



HOW AVALARA CAN HELP

Jesse is the property tax director for a telecom provider.

The time required to manually prepare and file thousands of returns is taxing their team. Jesse turns to Avalara Property Tax to automate returns preparation and filing.

The solution saves the team days of work and frees them up to focus on higher-value tasks, like being proactive with determining valuations and challenging assessments.

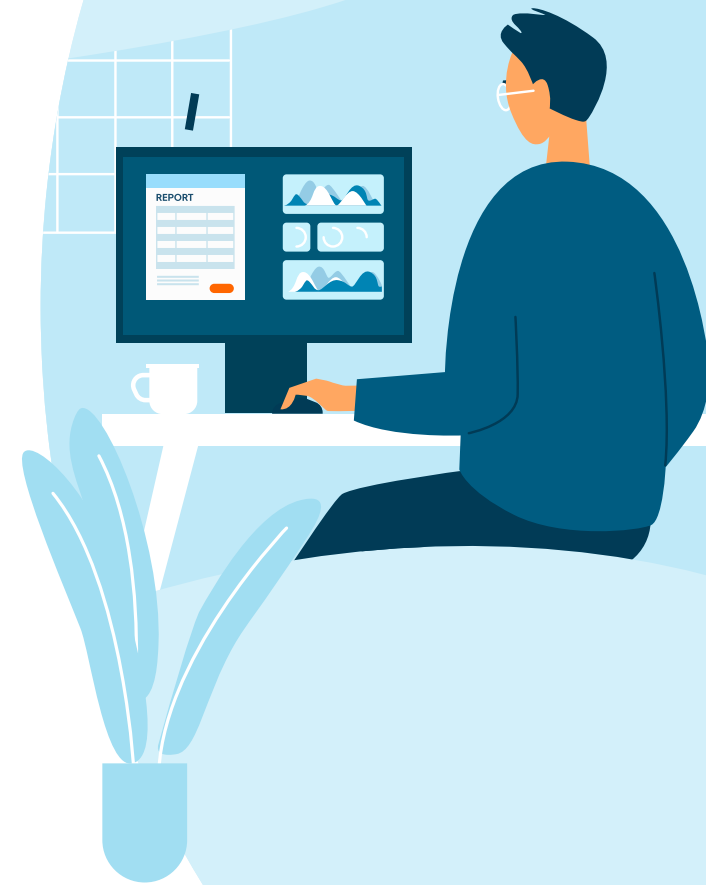


Create business reports

Avalara Property Tax helps your team save money and time with robust reporting features. Create and download more than 60 reports that provide users with visibility of the complete property tax management cycle. Reports are generated in the background without forcing you to wait.

Compare prior and current year property values and tax amounts. Get the status of your returns. Project expected taxes, discover how much tax you paid, and find out which tax rates were applied. Perform what-if analysis changing asset class depreciation schedules and trend tables from those used for previous filings.

Your implementation coordinator can build desired reports when you set up Avalara Property Tax.



HOW AVALARA CAN HELP

Aisha is the senior property tax analyst at an airline.

The company pays substantial property tax every year. Aisha uses Avalara Property Tax to provide executives at the business with status reports of property tax assessments in appeal and run scenarios to help quantify how much the airline could save.

Comprehensive reporting tools also give Aisha instant access to data to support audit requirements.





Access ongoing support services

Avalara offers multiple ways to get additional help when you need it and to make tax compliance even easier.

- *Contact Avalara Property Tax support by email.*
- *Send a request for support through Product Help.*
- *Watch [Avalara University](#) training for self-help resources with tips on implementing and using Avalara Property Tax.*
- *Reach out to Avalara Property Tax Advisory Services for valuation, advice, and expert witness testimony for large property appeals.*

Ask an Avalara Property Tax product specialist for more information about how you can get started.

Disclaimer:

Tax rates, rules, and regulations change frequently. Although we hope you'll find this information helpful, this product guide is for informational purposes only and does not provide legal or tax advice.