

Aseptico

Leading dental equipment provider Aseptico selects Epicor Tax Connect to streamline their tax activities across 40 states in the U.S.



Company Facts

Overview

- ▶ Location—Woodinville, WA, U.S.
- ▶ Industry—Manufacturing, healthcare
- ▶ Founded in 1975
- ▶ Exports to more than 125 countries
- ▶ Website—www.aseptico.com

Solution

- ▶ Epicor® ERP

Success Highlights

Challenges

- ▶ Managing economic nexus and tax filings in all states across the U.S.
- ▶ Handling Voluntary Disclosure Agreements (VDA), tax notices
- ▶ Showing appropriate taxes on quotes and invoices
- ▶ Streamline the process of managing legacy and new tax certificates

Benefits

- ▶ Increased efficiency by time and costs saved on tax determination
- ▶ The solution is end-to-end compliance provided by Avalara
- ▶ Everything is monitored on taxes, the notification area at login is helpful
- ▶ Use tax for AP is included
- ▶ Affordable costs compared to alternatives
- ▶ One bank transaction instead of 40 each month



Aseptico designs, manufactures and distributes high quality surgical, endodontic, and portable dental equipment.

Aseptico sells directly to dentists and oral surgeons, but they also supply distributors and dealers. The company is proud to provide OEM products for some of the largest dental distributors in the world. Aseptico also ships to public health, military, and non-profit organizations.

Why was Aseptico looking for a tax solution?

Paul Jackson, CFO at Aseptico, spent 6 hours each month preparing and filing state tax returns for 4 states—before implementing Epicor Tax Connect.

The new standards of economic nexus mean that Aseptico needs to file tax returns in all U.S. states, where they have customers or trading partners. It means working with 40 states instead of only 4. If they continued their old manual practice, Paul's team would need to work 60 hours a month (almost two work weeks) preparing and filing tax returns, plus the efforts to manage tax notices, tax holidays, and exemptions. Not to mention updating tax rates for all of the jurisdictions every time they change.

Paul certainly wanted to avoid having an additional employee to work exclusively on taxes, so they decided to find a product that is capable of applying the proper tax rates and help them with the expansion of their tax filing and compliance activities accordingly.

What were the experiences during implementation?

Aseptico found Epicor Tax Connect through Epicor when they were looking for a quality product. Paul heard about other tax add-ons written for Epicor ERP, but had the impression that those are not thorough enough nor tightly integrated enough and none of them works with tax exemption certificates. These solutions do not connect to an updated professional service like Avalara.

“I did not consider others, because Avalara is the only one that is truly integrated.”

—Paul Jackson, CFO | Aseptico

Epicor Tax Connect was implemented at Aseptico on October 1, 2016. According to Paul, it was the last month he ever filed a state tax return.

Paul reduced risk and saved time with Voluntary Disclosure Agreement (VDA) services, in part because the Epicor Tax Connect product can easily provide the relevant information due to the tight integration with Epicor ERP.

Which modules does Aseptico use and why?

Aseptico uses three products offered by Epicor:

- ▶ Epicor Tax Connect
- ▶ Epicor Tax Connect CertCapture
- ▶ Epicor Tax Connect Tax Returns

Paul says *“We use all three products. I don’t know how you would do it any other way”*.

Epicor Tax Connect manages the sales and use tax rate determination accurately on a transaction line level for each sales quote, sales order, and invoice, accessing the industry-leading Avalara services in real time that is always updated and covers more than 14,000 tax jurisdictions.

Epicor Tax Connect CertCapture maintains all the tax exemption certificates for Aseptico, and determines if the exemption reason is valid for the destination jurisdiction. Even the legacy certificates were imported and utilized during implementation.

Epicor Tax Connect Tax Returns does all filing and remittance for tax returns in more than 40 states in the U.S.—instead of 40 bank transfers they only need bank transaction each month, which is a huge time and cost saver.

A recommendation from Aseptico

“People think the cost will be overwhelming” says Paul. The investment into Epicor Tax Connect pays off by saving significant time, and cost savings—considering the changed tax landscape with new economic nexus in more than 40 states.

For CertCapture, their existing certificates needed to be fully vetted. They used Avalara’s Professional Services for a full review and used that as a learning opportunity for their internal team on how to manage those certificates.

Aseptico is still happy with Epicor Tax Connect and successfully completed a state tax audit since the product was implemented.

“I love that it is full service. It takes care of all our tax needs.”

—Paul Jackson, CFO | Aseptico

About Epicor

Epicor Software Corporation drives business growth. We provide flexible, industry-specific software designed to fit the precise needs of our manufacturing, distribution, retail, and service industry customers. More than 45 years of experience with our customers’ unique business processes and operational requirements are built into every solution—in the cloud or on premises. With this deep understanding of your industry, Epicor solutions dramatically improve performance and profitability while easing complexity so you can focus on growth. For more information, [connect with Epicor](#) or visit www.epicor.com.