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# Sales Tax Management

## Case Study



**Zoho**  
Authorized  
Partner





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# Overview

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**SGM Tax Services**



**Finance Industry**



**Sales Tax Management**

**Zoho App Used : Zoho Creator**

# Background

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SGM Tax Service is a specialized sales tax consulting firm providing end-to-end tax compliance services for businesses across multiple jurisdictions. Their services include Sales Tax Return Filings, Consulting & Adhoc (C&A) services, Registrations, and Exemptions. With a rapidly growing client base and increasing compliance complexity, SGM Tax Service required a scalable and reliable system to manage operations efficiently.

# Challenges

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Overall, the existing process lacked centralization and visibility, making it difficult to closely track each return progress level and monitor the time spent on individual records

- Managing 110+ active customers, each with multiple places of business across different states
- Handling 300+ sales tax returns on a monthly and quarterly basis, along with yearly filings
- Each return required location-wise tracking, making consolidation difficult
- Strict filing deadlines where even a minor delay could lead to penalties for clients
- Heavy reliance on Excel spreadsheets for tracking returns, registrations, and tasks, which resulted in:
  - Manual data entry and duplication
  - High risk of human errors
  - Lack of real-time visibility
  - Difficulty tracking task ownership and status
- No centralized system to:
  - Assign preparers, reviewers, and team leads
  - Track progress across multiple task types
  - Monitor time spent on each task
- Inefficient communication with clients through emails and calls for approvals and clarifications
- Limited reporting and no real-time dashboards to summarize workload, deadlines, or performance

Overall, the existing process was time-consuming, difficult to scale, and prone to delays, making it challenging to consistently close returns on time.

# Solution

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We built a Sales Tax Management application using Zoho Creator to replace SGM Tax Service's manual Excel-based process and bring all tax-related work into one centralized system.

The solution helps SGM Tax Service manage all their clients, locations, and tax activities efficiently while ensuring returns are completed on time.

## How the Solution Works

- All Sales Tax Returns, Registrations, Consulting & Adhoc (C&A), and Exemption tasks are managed in one application
- Based on the return calendar, the system automatically creates return tasks for each client and each business location (monthly, quarterly, and yearly)
- Each task is assigned to a Preparer, Reviewer, and Team Lead, so responsibilities are clear
- Team members can update task status, add comments, and track progress easily
- Email reminders notify users about deadlines and pending actions
- A time tracker records the time spent on each task
- Dashboards provide quick summaries with filters for clients, periods, and task status
- A secure Client Portal allows clients to:
  - View all their returns, registrations, C&A, and exemption details
  - Approve or reject filings directly in the system

This simplified and automated approach ensures better control, visibility, and collaboration for both the internal team and clients.

# Result

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By moving from manual Excel tracking to a custom-built Sales Tax Management application on Zoho Creator, SGM Tax Service achieved significant operational improvements.

- Replaced multiple Excel sheets with a single, centralized Zoho Creator application
- Eliminated manual tracking and follow-ups that were difficult to manage in spreadsheets
- Automated creation of monthly, quarterly, and yearly return tasks, reducing the risk of missed deadlines
- Improved accuracy and consistency by maintaining structured data instead of scattered Excel files
- Enabled real-time visibility into:
  - Return status
  - Task ownership
  - Client-wise and location-wise compliance
- Improved team productivity with:
  - Clear role assignments (Preparer, Reviewer, Team Lead)
  - Built-in comments and task history
  - Time tracking for each task
- Simplified client communication through the Zoho Creator Client Portal, replacing email-based approvals
- Faster decision-making using dashboards and reports, which was not possible with Excel

Overall, the Zoho Creator application transformed a manual, spreadsheet-heavy process into a scalable, automated, and reliable system that supports SGM Tax Service's growing business.

# Conclusion

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NYN IT Solutions successfully transformed SGM Tax Service's Excel-based tax management process into a centralized, automated, and scalable system using Zoho Creator. The custom Sales Tax Management application streamlined return tracking across multiple clients and locations, automated task creation based on return calendars, improved internal collaboration, and enhanced client communication through a secure portal, resulting in better visibility, timely tax filings, and increased operational efficiency. This project demonstrates NYN IT Solutions' ability to deliver practical, reliable, and scalable Zoho Creator solutions for businesses managing complex compliance workflows.



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