

Ideal Living Saves Time and Reduces Risk with the Help of CereTax

Ideal Living, based in Los Angeles, specializes in creating, marketing, and distributing innovative products to enhance health, wellness, and home environments. Their mission is to ensure everyone has access to clean air, clean water, and a solid foundation for wellness. They achieve this through their products: AirDoctor, AquaTru, and Aromatru.



Manual Processes Created Inefficiencies and Increased Risks

Ideal Living faced several challenges in managing its B2B sales operations. The Accounts Receivable (AR) team manually handled sales tax calculations, requiring it to look up tax rates, input them into the system, and then check them for accuracy. The process consumed significant time, risked errors, and led to dissatisfaction among the team. Every month, the AR team would need to correct entries for 10-20% of new B2B customers, resulting in needless delay. As Ideal Living rapidly expands its business from individual to commercial customers, with plans to quadruple its size by the end of the year, the existing process became unsustainable and unscalable. The team had to make a change.

At a Glance

Challenges

- 10-20% entries needed correction
- Sales tax processes weren't scalable with expected 400% growth

Benefits

- Quick and seamless implementation alongside ERP
- Immediate increase in efficiency
- Immediate reduction in workload

CereTax and Microsoft Were Implemented for Automation

To address these challenges, Ideal Living integrated CereTax Sales Tax with Microsoft Dynamics 365 Business Central, with the assistance of an implementation partner. The implementation process was straightforward and streamlined, supported by the responsive and knowledgeable CereTax team. The project, which ran from October to December 2023, included testing mid-way through. It included specific sales tax content for food and supplements and a custom shipping method, incorporating taxability behind the shipping, to ensure accurate tax calculations.

The CereTax team conducted training sessions and converted existing mappings to ensure a smooth transition. They maintained weekly calls to quickly resolve issues and provide ongoing support. Setting up SKU and customer information took just two weeks, followed by training and testing phases. Open lines of communication were vital for a seamless transition, and having a knowledgeable support team was crucial for addressing specific questions and concerns, ensuring the team felt fully supported throughout the process.

"Of all the integrations we set up with Microsoft Dynamics 365 Business Central, CereTax was by far the most straightforward and streamlined. The process was very easy and the team was exceptionally responsive and knowledgeable," said Lina Pinskaya, Controller of Ideal Living.

Ideal Living Saw an Immediate Increase in Efficiency and a Reduction in Workload

The success of sales tax automation was evident immediately. The CereTax process ran on its own with significantly reduced human oversight. Fewer data entry errors needed to be corrected. The AR team spent less time setting up and correcting invoices before they were sent out. And because of the training sessions, sales and accounting teams more efficiently managed sales tax in Business Central.

"We've seen a dramatic reduction in time spent on manual processes. The new system has truly streamlined our operations," said Nini Le, Accounting Consultant for Ideal Living.

Ideal Living Positioned for Growth with Sales Tax Automation

In conclusion, the move to automation with CereTax and Microsoft Dynamics 365 Business Central significantly improved Ideal Living's operational efficiency. By automating sales tax calculations and streamlining the invoicing processes, the company reduced the time and resources spent on error-correction, streamlined operations, and positioned itself for successful business expansion. The project highlighted the importance of thorough planning, effective training, and responsive support in streamlining business processes and automating sales tax.

"We knew we needed a solution to streamline our operations and support our rapid business growth. CereTax and Microsoft were the perfect fit," said Nini Le, Accounting Consultant for Ideal Living.

The CereTax team consistently provides support as needed, demonstrating responsiveness and quick turnaround times. They promptly hold calls to resolve issues and offer assistance from highly knowledgeable staff. Their responsiveness to specific questions ensured Ideal Living felt supported when transitioning to a new system and application.

"Having a knowledgeable support team made all the difference. They were responsive to our specific questions and helped us feel supported throughout the transition and after," said Lina Pinskaya, Controller of Ideal Living.

CereTax's Certified Microsoft Integration

CereTax provides a certified integration with Business Central. This allows the Ideal Living Sales and Accounting teams to manage the entire sales tax process directly from within the ERP, utilizing native workflows. As part of the implementation process, CereTax set up its robust rules engine to accommodate specific requirements with custom rules.

The tight integration between CereTax and Business Central ensures that issues are promptly flagged within the Business Central interface, allowing for swift resolution. One common example is the native Business Central posting approvals. If Business Central stops an invoice from posting due to a missing field, CereTax will also prevent the invoice from posting on its side. Conversely, if an invoice is ready to post in Business Central, but CereTax detects an issue, it blocks the posting process.