



RFP template

Setup and implementation

- What will the first 30 days with the software look like?
- How long is your typical implementation?
- What information will I need to complete the setup?
- Does your documentation include code snippets, detailed steps, and easy-to-follow examples?
- What resources do you have to help my team learn the software on their own?
- How will we test to ensure tax is being calculated correctly before going live?

Geographical support

- What markets do you currently support?
- Are you planning to expand support for more markets in the future?
- Do you provide support to help us register to collect tax in new markets?
- Can you help us navigate local regulations when we expand?
- Can you dynamically select the correct tax rates based on our customer's location?
- What are the steps to set up a new country, and how quickly can that be done?

Accurate, real-time tax rates

- How does your tax engine calculate tax rates?
- What does your software support in terms of product tax codes? Does my offering fall under your list of coverage?
- If we expand our product line, how easily can we add new product tax codes?
- How does your team ensure the tax rates and product tax codes used for calculations are kept up-to-date?

Filing and remittance

- Are your tax reports tailored to the filing requirements of each jurisdiction?
- Does your software provide due date reminders to ensure our team files on time in each location?
- What resources are available to educate our team on filing requirements for each region?
- How easy is it to download the relevant information to file each month or year?
- Do you provide resources that allow me to hand off my filing to a partner?

Pricing

- How is your pricing model structured?
- What can we expect to pay monthly?
- Is there an annual agreement or minimal contract commitment length?
- Can I switch between pricing models in a timely and efficient way?
- Are there any other fees outside of the monthly cost for the software that I should be aware of now?