

# Automated Tax ID Validation Prevents Billing Errors



## Client Overview

————— A global software company delivers Intelligent Automation solutions for enterprise environments supporting mission-critical operations. The billing team manages high volumes of customer invoices, requiring accurate data to ensure compliance and avoid financial discrepancies.

As operations scaled, maintaining consistent and accurate Tax ID records in Salesforce became increasingly critical.

## Challenges Faced

Missing or inconsistent Tax IDs in Salesforce caused invoice errors, rework, and compliance risk.



### Manual Tax ID Checks

Billing teams manually verified and corrected Tax ID records, increasing effort and delays.



### Inconsistent Data Collection

Tax IDs were collected at different stages, often after invoicing had already begun.



### Invoice Errors and Rework

Incorrect invoices were not blocked, requiring time-consuming corrections.



### Compliance and Risk Exposure

Missing or incorrect Tax IDs increased the risk of legal and tax-related issues.

## The Solution

Amiseq implemented a **Tax ID Validation Automation** integrated with Salesforce to ensure accurate data before invoicing.

The solution automatically checks for Tax ID availability, triggers customer follow-ups when data is missing, and updates records once valid information is received. By enforcing validation before invoice generation, the system prevents incorrect invoices from being issued.



Why the Client Chose

AMISEQ  
YOUR TECH PARTNER



Expertise in automating  
finance and billing  
workflows

Seamless integration with  
Salesforce

Strong focus on data  
accuracy and compliance

Ability to prevent errors  
upstream rather than  
correcting them later

# Strategy and Implementation



## Trigger Validation on Invoice Events

Automation initiates when key billing details are entered in Salesforce.



## Check Tax ID Availability in Salesforce

The system verifies whether a valid Tax ID exists for the customer account.



## Initiate Customer Follow-Up

If missing, automated emails request the required Tax ID from the customer.



## Update Records and Handle Exceptions

Valid responses are extracted and updated, while exceptions are routed for review.



## Track Status and Generate Reports

Automation monitors responses and generates summary reports for the billing team.

# What Amiseq Delivered

**90%**

## Effort Reduction

Manual verification and correction efforts were significantly reduced.

**300**

## Hours Saved Annually

Billing teams spent less time on rework and follow-ups.

## Fewer Invoice Errors

Incorrect invoices were prevented before issuance.

## Improved Compliance and Accuracy

Consistent Tax ID capture reduced risk and ensured data integrity.

## Conclusion

Tax ID validation is now handled proactively, preventing errors before they impact billing. Automation ensures that the required data is captured, verified, and updated at the right time in the process.

With fewer manual corrections and stronger data control, billing operations run more smoothly. The organization benefits from improved accuracy, reduced compliance risk, and a more efficient invoicing workflow.

## Modernize Billing Data Validation

See how Amiseq can automate Tax ID validation and improve billing accuracy.

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