5 Tax Workflows You Can Automate With AI in 5 Days

Tax Workflow Automation — Why Now?

The path to the rise of tax workflow automation is easy to trace. It's a logical response to the current environment in the tax industry:

- Teams are under immense pressure, working with more entities, more jurisdictions, and more data than ever, yet the headcount stays the same
- Data fragmentation across ERPs, subledgers, spreadsheets, and tax engines forces teams to extract, reformat, and reconcile information before analysis can begin
- Far too much capacity is tied up in manual processes like data entry, data preparation, reconciliation, and reporting

According to Ernst & Young, 72% of tax personnel's time is spent on routine compliance work vs. 28% on higher-value work. This is the exact mix that automation can rebalance.

Thomson Reuters found that only 26% of corporate tax departments have a dedicated tax data management system. The lack of a connected data layer forces hand-stitched extracts and late tie-outs.

Thankfully, much of the work that eats up capacity is predictable and rule-based, and thus, perfect for automation: pulling data from source systems, normalizing it, running calculations, reconciling results, and packaging evidence for review.

This guide walks through five common tax workflows you can automate in as little as five days, freeing your team to focus on more high-value, judgment-intensive work.

The Trouble With Spreadsheets

Manual extracts and one-off macros drive errors, slow reviews, and messy audit trails. In fact, a 2024 study in Frontiers of Computer Science found that **94%** of spreadsheets used in business decision-making contain errors, posing serious risks.

In February 2024, Australia's Department of Finance inadvertently emailed a spreadsheet with hidden worksheets to 236 suppliers, exposing confidential pricing and contacts — a failure the department's independent review **traced to manual spreadsheet processes.**

In December 2021, **Crypto.com mistakenly transferred $10.47 million instead of $100** due to a manual data entry error in a spreadsheet-driven workflow, triggering asset recovery efforts and criminal proceedings.

These aren't edge cases. They show how small mistakes cascade into missed data, misstated results, and costly remediation in high-stakes finance.

Benefits of Workflow Automation

Workflow automation standardizes data intake, calculations, and evidence capture across repeatable tax workflows. It converts ad hoc tasks into governed, scheduled runs, so teams spend more time reviewing results and less time assembling inputs. This means:

- Less manual handling and copy-paste across spreadsheets and systems
- Shorter cycle times; faster month/quarter close
- Consistent, searchable evidence and end-to-end lineage
- Fewer errors and rework; lower audit and compliance risk
- Standardized, version-controlled rules across entities and jurisdictions
- Audit-ready, reusable outputs (CSV/PDF) for provision, returns, and reviews

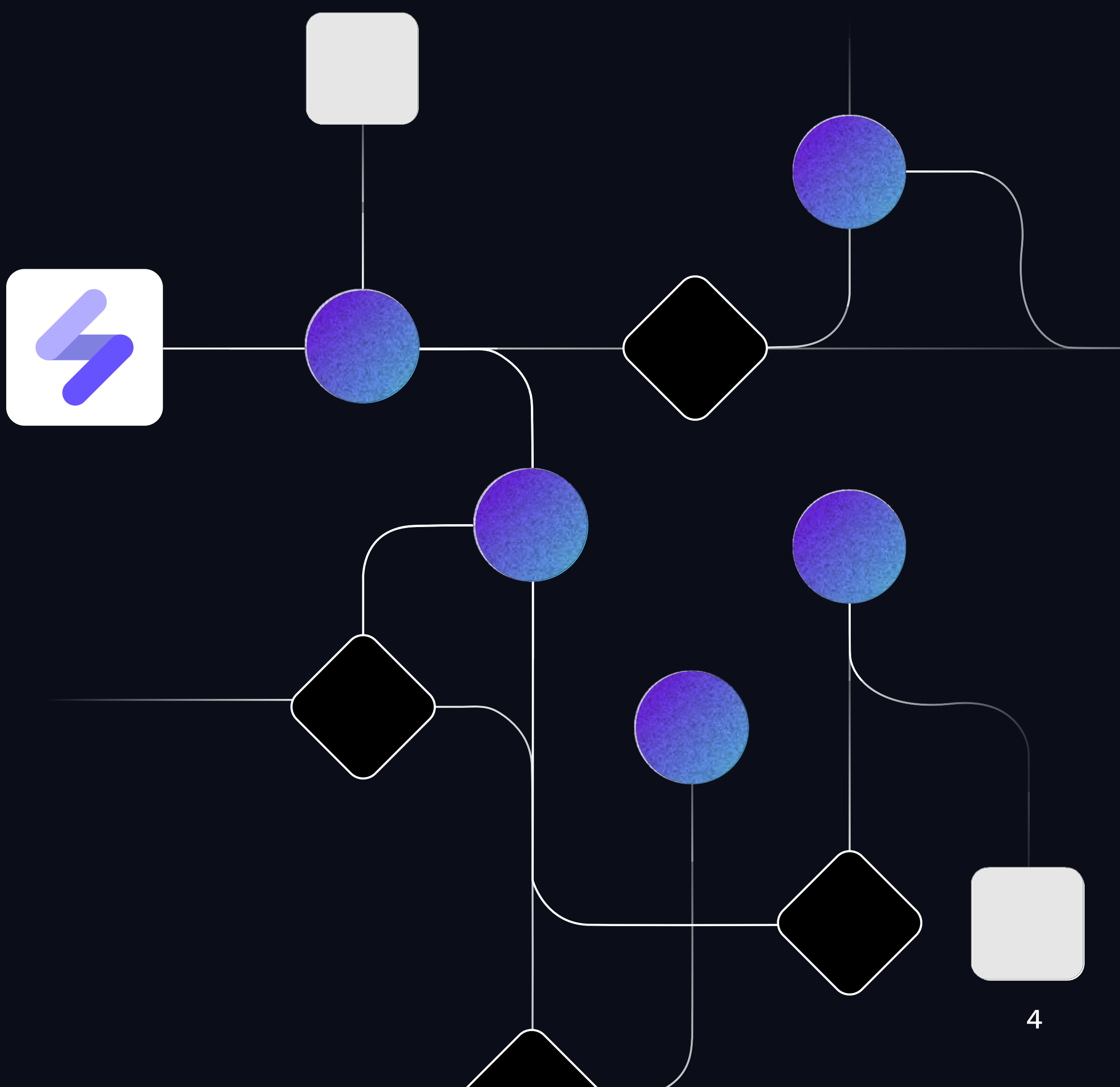
Fewer spreadsheets, faster closes, cleaner evidence, and lower audit risk. With Savant's repeatable AI automation, tax teams can standardize data, codify rules, and publish audit-ready outputs consistently.

Big Impact, Small Lift

Finance teams across industries are moving away from spreadsheets and adopting Savant's AI workflow automation platform to automate tax management.

Savant's simple, intuitive user experience lets tax professionals build governed workflows that boost productivity and accuracy without having to wait on IT.

Let's look at five high-impact workflows you can stand up in just five days.



Workflow 1

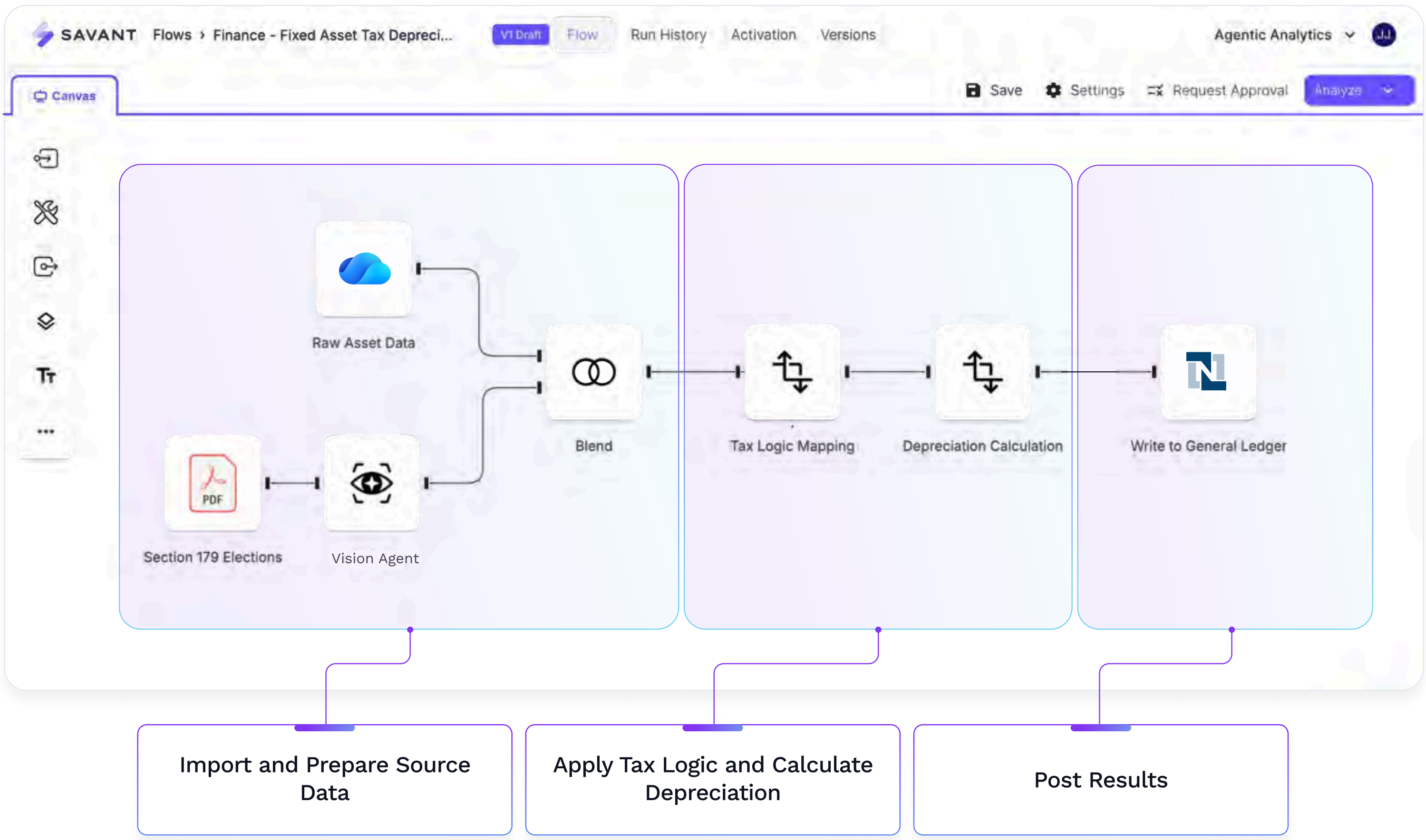
Fixed Asset Tax Depreciation

Enterprises with tens of thousands of assets across multiple entities have to track both book and tax depreciation at once, applying MACRS (Modified Accelerated Cost Recovery System), bonus depreciation, and Section 179, then carrying the differences through to deferred taxes.

Why it's challenging: Book and tax asset records usually live in separate systems, so every addition, disposal, and method change has to be matched and reconciled by hand. Disposals are especially painful, since the same asset has to be located in two systems by name and acquisition date.

Without Savant: Each close or filing, the team exports book data, re-keys changes into the tax system, validates them, and chases book-vs-tax differences line by line. That's roughly three to five days of reconciliation per cycle at enterprise scale, repeated every time assets are added or retired.

With Savant: Pull fixed-asset data, apply the tax depreciation rules automatically, and reconcile book vs. tax in one place. Generate roll-forward schedules, deferred-tax reconciliations, and audit-ready workpapers with approvals. All of this can be automated and run on a schedule.



Workflow 2

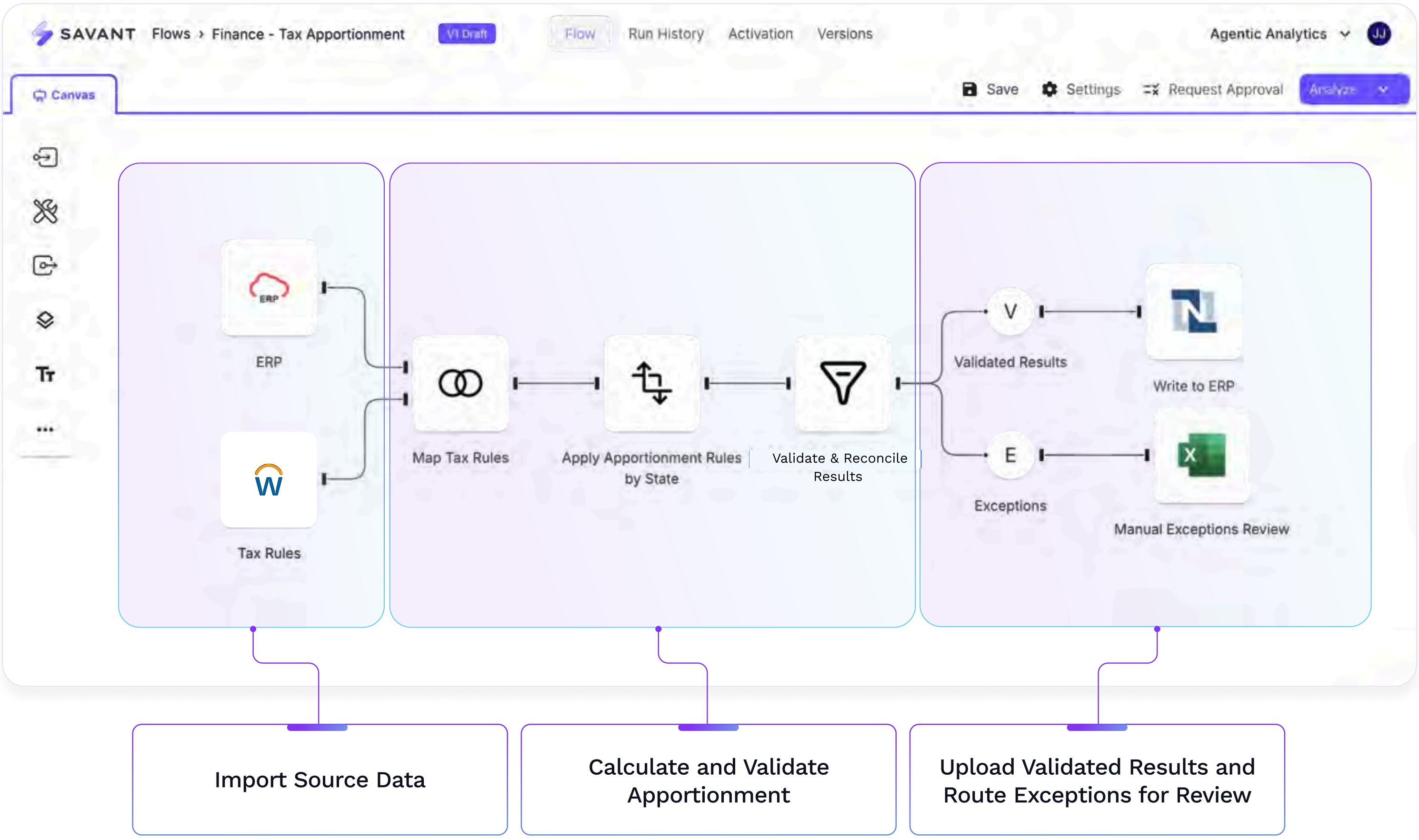
Tax Apportionment

Multistate enterprises have to divide income across dozens of states using each state's apportionment formula, which weighs sales, payroll, and property factors to determine how much income each state can tax.

Why it's challenging: Every state applies different and frequently changing rules, like three-factor, double-weighted sales, or single-sales-factor, and sourcing receipts takes real judgment. The underlying data is scattered across entities and locations, which makes manual calculation highly resource-intensive.

Without Savant: Teams build multi-tab Excel workbooks — a tab per factor, per state, per entity — manually pulling revenue, payroll, and property by location and re-updating formulas every period. Across a wide state footprint, that's roughly two to three weeks of work during each compliance cycle, and managing dozens of workbooks is error-prone.

With Savant: Automatically pull revenue, payroll, and property data by entity and location, apply each state's sourcing rules, and compute the factors and apportionable income. Publish factor workpapers and prior-period bridges, and export a tie-out pack for the provision and state returns with reviewer approvals.



Workflow 3

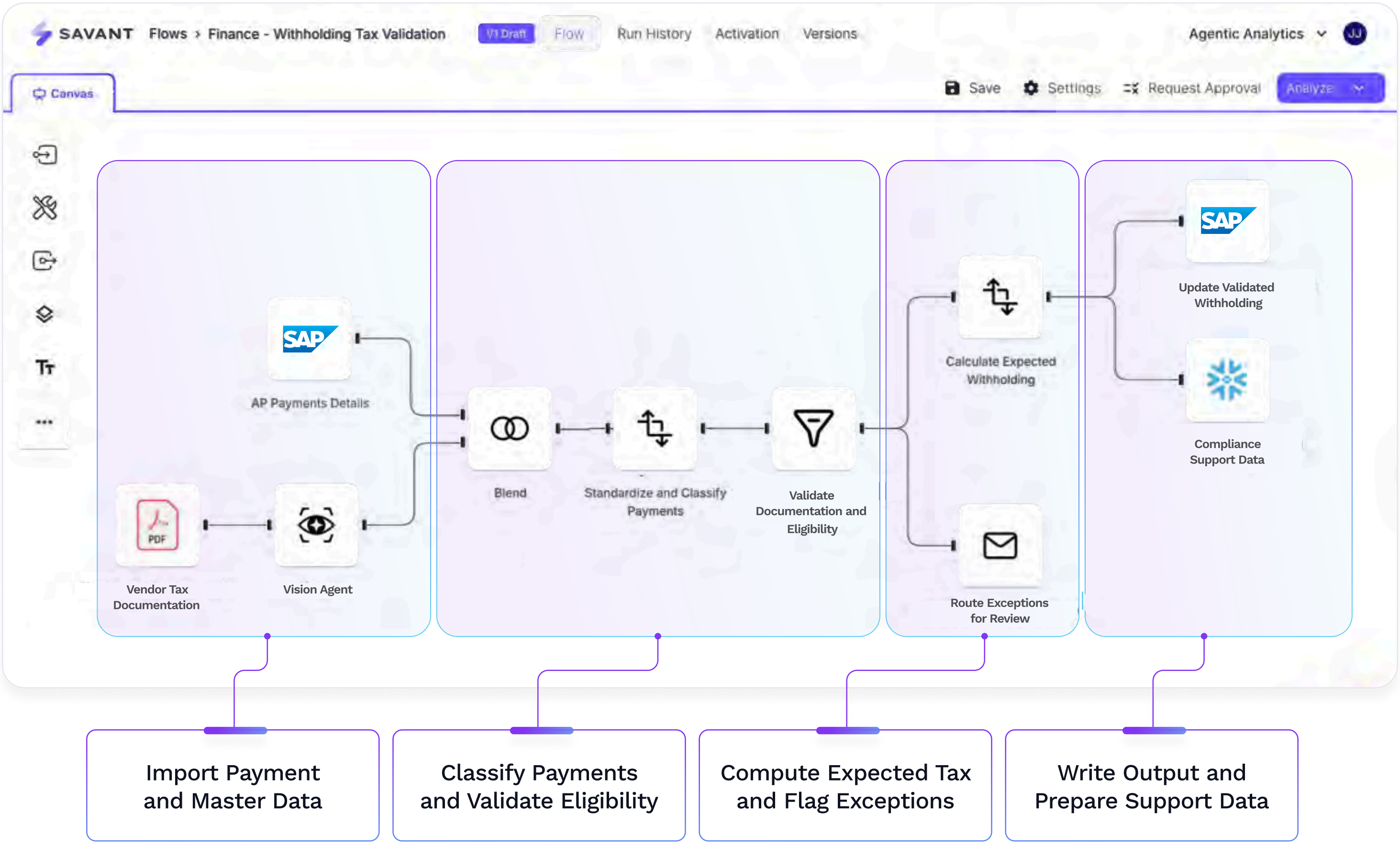
Withholding Tax Validation

When enterprises pay vendors, contractors, and cross-border payees, they must withhold the correct tax, often at reduced tax-treaty rates, and reconcile those credits back to the general ledger and returns.

Why it's challenging: It requires matching payee data to tax certificates, validating TINs, finding the right treaty rate for each payment type, and reconciling across large, varied payment volumes, with hundreds or thousands of 1042-S forms that all have to aggregate correctly into the return.

Without Savant: Analysts review invoices and payment files by hand, look up treaty rates one at a time, and tie withholding back to the ledger in spreadsheets. At enterprise volumes, this takes approximately one to two weeks of reconciliation each filing cycle. Over- or under-withholding often surfaces late.

With Savant: Savant's AI agents read invoices and payment files; capture payer, payee, gross amounts, withholding rates, and treaty details; and check them against policy. Automatically reconcile withholding credits to the GL and returns, flag over- or under-withholding, and generate claim/refund packages with evidence and approvals.



Workflow 4

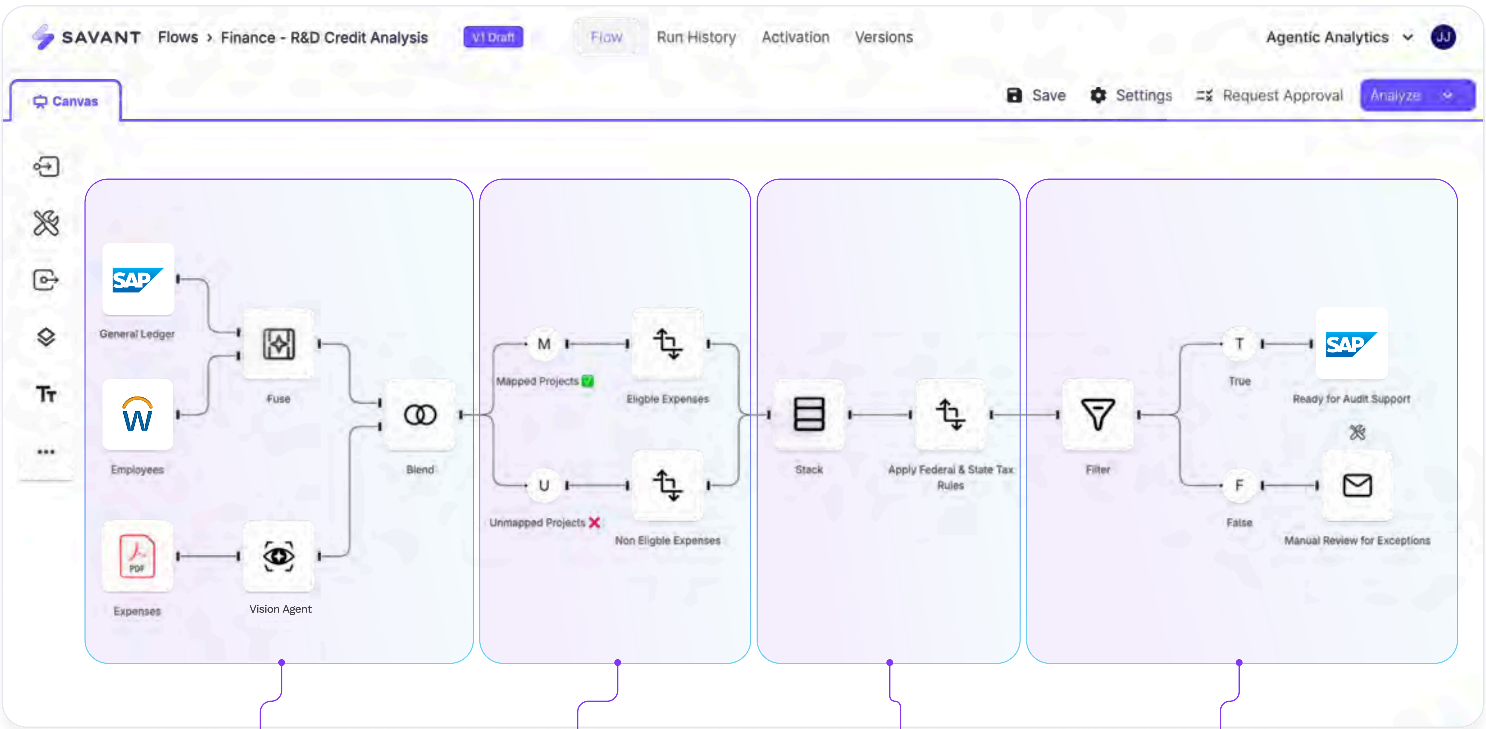
R&D Credit Analysis

Enterprises claiming R&D credit have to identify qualified research activities and quantify the associated qualified expenses, such as wages, contractor costs, and supplies, then substantiate all of it for filing and potential audit.

Why it's challenging: The "substantially all" wage test rule under Section 41 is analyzed employee-by-employee, costs have to be allocated per project, and it takes finance, engineering, and operations working together to assemble contemporaneous documentation.

Without Savant: The quantification phase of gathering financial data, allocating costs per project, and calculating qualified expenses and the credit typically runs three to six weeks before anything is filed, and the supporting evidence is often reconstructed after the fact, which weakens the claim under audit.

With Savant: Automatically combine payroll, contractor, and project costs; tag qualified research activities; and apply the rules to calculate qualified expenses and the credit. The system generates substantiation files with short narratives and samples, keeps a change log, and exports schedules for filing and audit.



Import, Standardize, and Map Project Data

Identify Qualified and Unqualified Expenses

Apply Credit Rules and Calculate Qualified Expenses

Prepare Workpapers and Route Exceptions for Review

Workflow 5

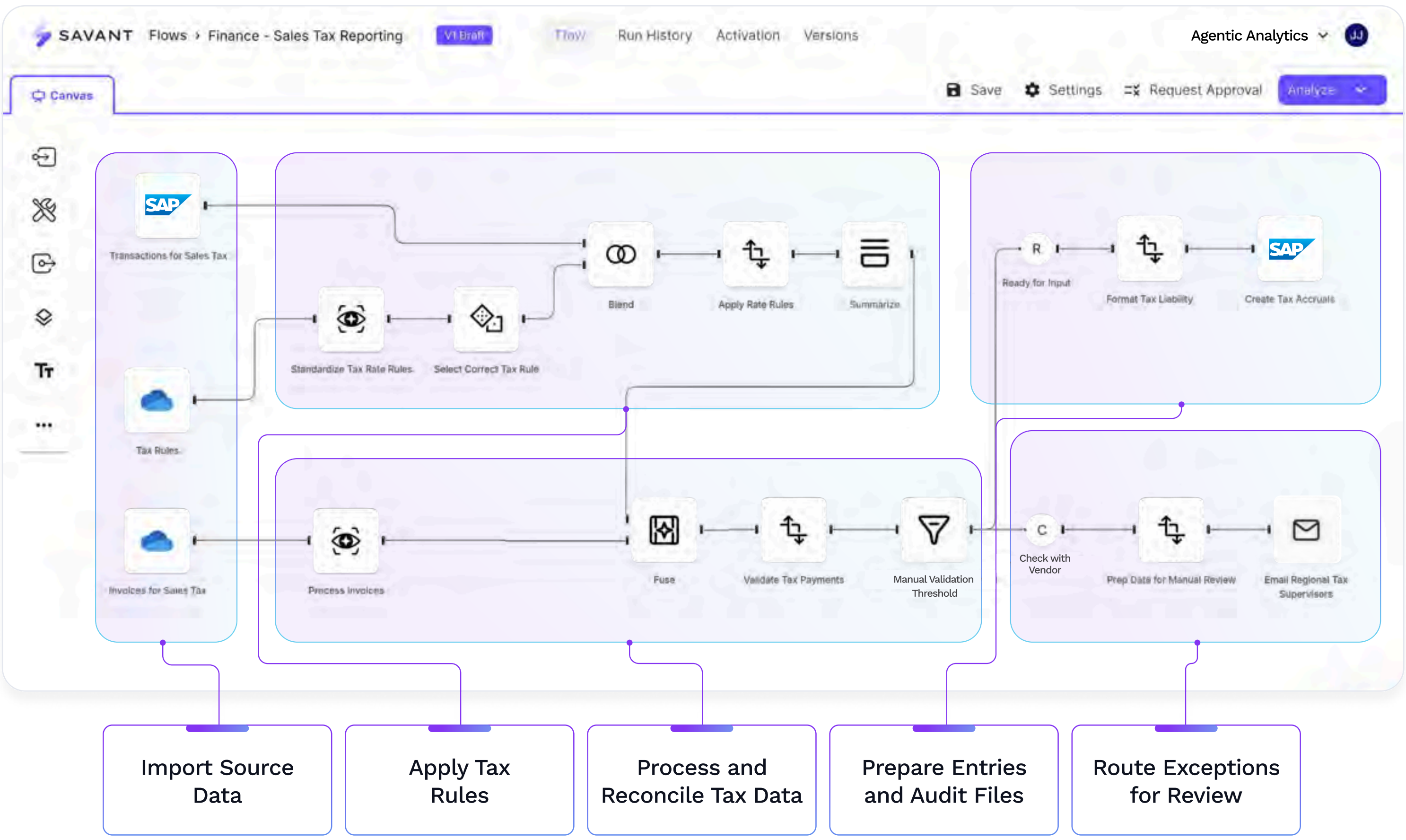
Sales Tax Reporting

High-volume enterprises have to classify products and services for taxability, apply the right rate and exemptions by jurisdiction, and file accurate returns across many states and localities.

Why it's challenging: Rates and rules vary by location and change constantly, transaction volumes are enormous, and each additional state multiplies the filing burden.

Without Savant: Manual sales tax work scales with your footprint — over 20 hours a month at ~15 states and toward 70 hours at 46 states. Simple returns take about 45 minutes each, while complex or home-rule jurisdictions can take up to three hours. A wide-nexus enterprise spends the better part of one to two weeks of effort every month in just filing.

With Savant: The system ingests high-volume AP/AR/POS transactions, classifies products and services for taxability, and validates rates and exemptions by location. Savant automatically reconciles accruals, surfaces refund opportunities and recurring exceptions, and produces filing-ready reports and journals with evidence and sign-offs.



Your One-Week Game Plan

Follow this schedule to get your tax workflows up and running in no time.

Day 1-2	**Connect sources** and load prior workpapers
Day 3-4	**Configure workflow rules**, run baseline, and review exceptions
Day 5	**Publish workpapers**, enable approvals, and schedule recurring runs

Customer Spotlight

"We rebuilt our monthly tax process in Savant. It now runs on a schedule, matches transactions automatically, and is always audit-ready. From pulling data to reconciling it and pushing clean results into our stack, Savant handles the entire tax workflow."

Paige Foelber
Senior Tax Accountant, Rover

Ready To Get Started?

Identify your biggest time sinks. The first step is to identify the tax workflows with the most repetitive, manual work, including copy-paste across spreadsheets, hand-built reconciliations, and one-off macros. When you're ready, automate them.

Don't have a workflow automation solution in place?

Savant helps finance, tax, and accounting teams automate data preparation and analytics workflows with agentic AI, so practitioners can create governed workflows that enhance accuracy and productivity. Book a demo below to see how Savant can address your specific needs.

Schedule a personalized demo

to see examples, ask questions, and explore next steps.

www.savantlabs.io

SAVANT