taxsuite

tpdoc

The smart documentation tool for TP professionals

By **TAXMODEL**
A Tax Systems Company

TPdoc

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FY 2022

Overview
Dashboard
Status board
Allocate work items

Intercompany model
Controlled transactions
Comprehensive information
Master file
Local file

LOCAL FILE CREATION STATUS

Overview | Functions | Transactions

LOCAL FILE PREPARATION

Repository
Custom tags
File manager

tpdoc
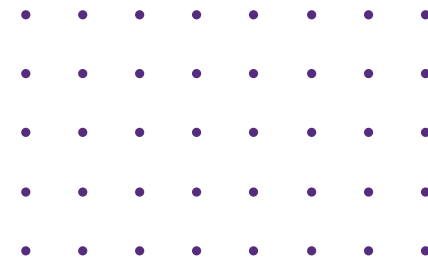
Accelerate your transfer pricing documentation workflows

Whether you want to scale-up your transfer pricing practices, leverage your resources or step-up your quality standards... try TPdoc! Gather data smarter, create files faster, and fortify your compliance by 100%.
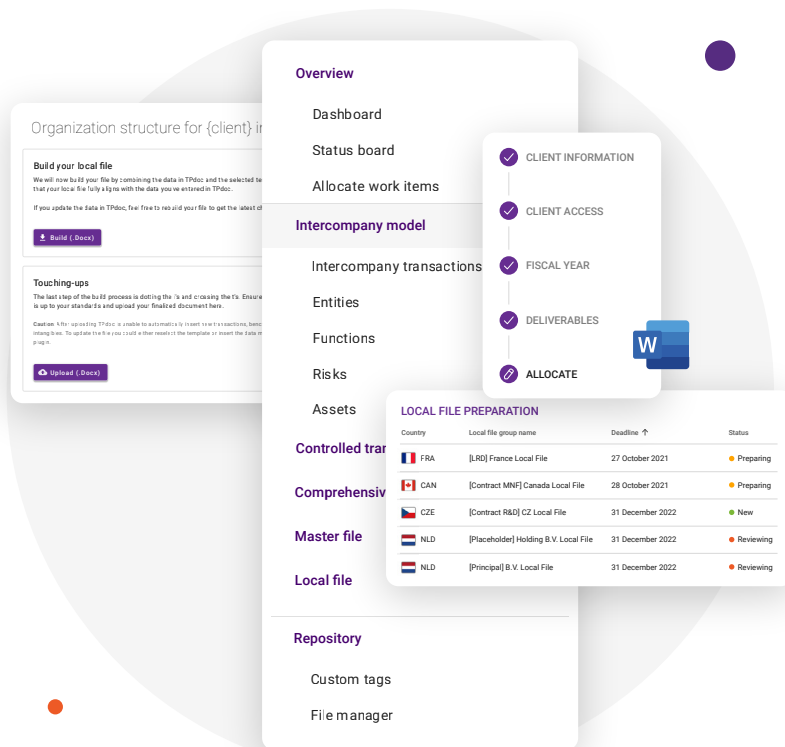
The smart documentation tool for TP professionals

Today, the realm of Transfer Pricing Documentation is governed by OECD guidelines and a country's legislation. The job that needs to be done is to fortify the transfer pricing policy in a manner geared towards the relevant tax authorities.

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Overview

Dashboard

Status board

Allocate work items

Intercompany model

Intercompany transactions

Entities

Functions

Risks

Assets

Controlled tran

Comprehensiv

Master file

Local file

Repository

Custom tags

File manager

Organization structure for {client} in

Build your local file

We will now build your file by combining the data in TPdoc and the selected te that your local file fully aligns with the data you've entered in TPdoc.

If you update the data in TPdoc, feel free to re-build your file to get the latest ch

⬇ Build (.Docx)

Touching-ups

The last step of the build process is dotting the i's and crossing the t's. Ensure is up to your standards and upload your finalized document here.

Caution: After uploading TPdoc is unable to automatically insert new transactions, benc intangibles. To update the file you could either reselect the template or insert the data m graph.

⬆ Upload (.Docx)

✓ CLIENT INFORMATION

✓ CLIENT ACCESS

✓ FISCAL YEAR

✓ DELIVERABLES

✎ ALLOCATE

LOCAL FILE PREPARATION

Country	Local file group name	Deadline ↑	Status
🇫🇷 FRA	[LRD] France Local File	27 October 2021	● Preparing
🇨🇦 CAN	[Contract MNF] Canada Local File	28 October 2021	● Preparing
🇨🇿 CZE	[Contract R&D] CZ Local File	31 December 2022	● New
🇳🇱 NLD	[Placeholder] Holding B.V. Local File	31 December 2022	● Reviewing
🇳🇱 NLD	[Principal] B.V. Local File	31 December 2022	● Reviewing

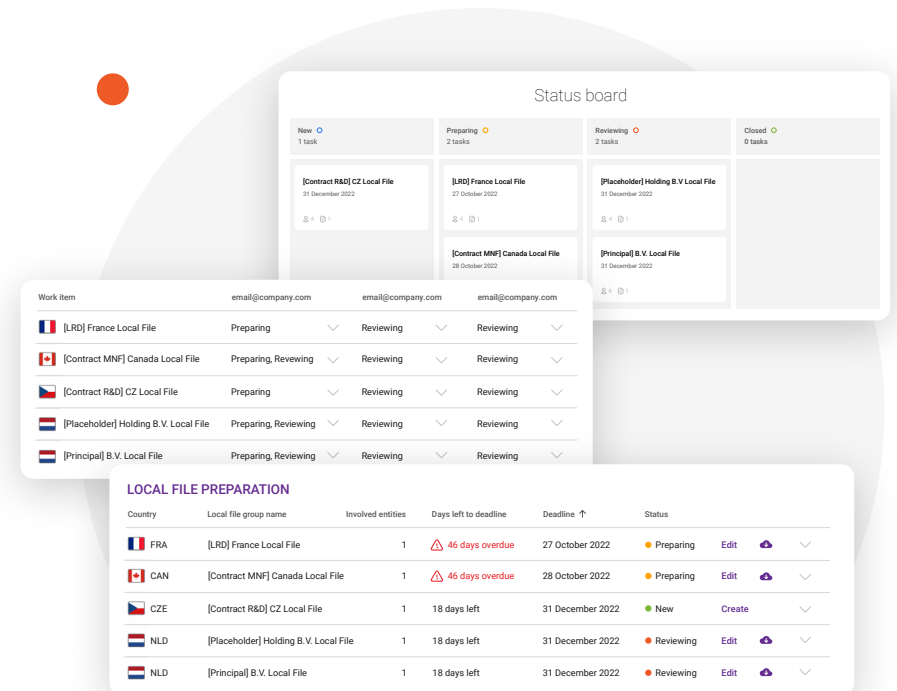## For building or expanding your transfer pricing practices

TPdoc provides a central platform for all your key transfer pricing documentation workstreams. It generates automated, customised OECD-compliant Master and Local files in MS Word format. Time-saving features include vertical (future and past), as well as horizontal (country and entity) roll-forwards.

- A user-friendly platform to be used as a single point of proof for all transfer pricing documentation workstreams.
- Automated Master- Local file generation in Word format directly from platform.
- Training capabilities for junior TP professionals.
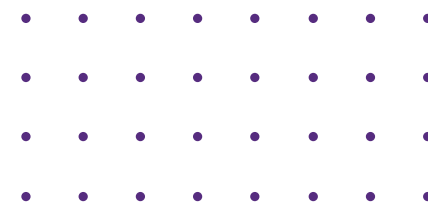
Collaborate with your team and clients

TPdoc offers various user roles that are linked to the file status, e.g., preparing or reviewing documents, etc. TPdoc can also be upgraded to allow the status and user roles to be set according to a company's bespoke wishes and to be defined at any level, including collaboration options with 3rd parties.
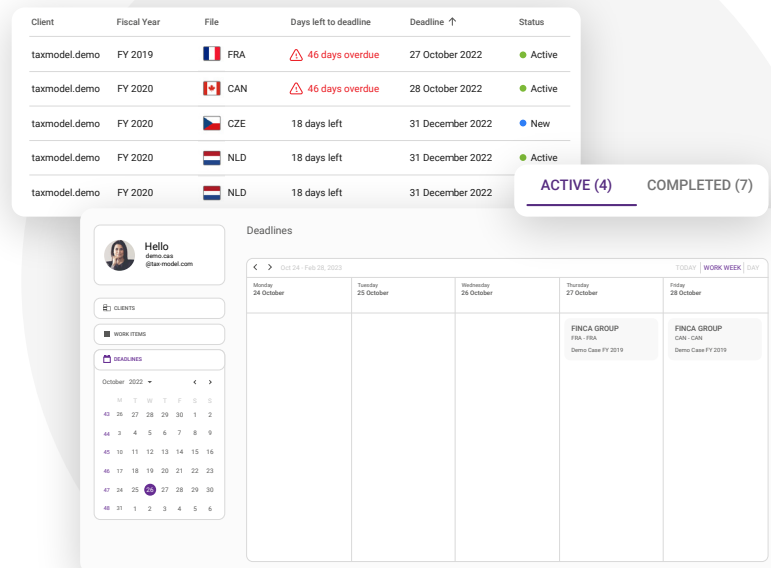
- Manage the status of all files.
- Define user roles linked to their status.
- Collaborate with your colleagues and other stakeholders.
- Ensure data security with access based on the principle of least privilege.

Status board

New 1 task	Preparing 2 tasks	Reviewing 2 tasks	Closed 0 tasks
[Contract R&D] CZ Local File 31 December 2022	[LRD] France Local File 27 October 2022	[Placeholder] Holding B.V Local File 31 December 2022	
	[Contract MNF] Canada Local File 28 October 2022	[Principal] B.V. Local File 31 December 2022	

Work item	email@company.com	email@company.com	email@company.com
[LRD] France Local File	Preparing	Reviewing	Reviewing
[Contract MNF] Canada Local File	Preparing, Reviewing	Reviewing	Reviewing
[Contract R&D] CZ Local File	Preparing	Reviewing	Reviewing
[Placeholder] Holding B.V. Local File	Preparing, Reviewing	Reviewing	Reviewing
[Principal] B.V. Local File	Preparing, Reviewing	Reviewing	Reviewing

LOCAL FILE PREPARATION

Country	Local file group name	Involved entities	Days left to deadline	Deadline ↑	Status		
FRA	[LRD] France Local File	1	⚠ 46 days overdue	27 October 2022	● Preparing	Edit	☁
CAN	[Contract MNF] Canada Local File	1	⚠ 46 days overdue	28 October 2022	● Preparing	Edit	☁
CZE	[Contract R&D] CZ Local File	1	18 days left	31 December 2022	● New	Create	
NLD	[Placeholder] Holding B.V. Local File	1	18 days left	31 December 2022	● Reviewing	Edit	☁
NLD	[Principal] B.V. Local File	1	18 days left	31 December 2022	● Reviewing	Edit	☁

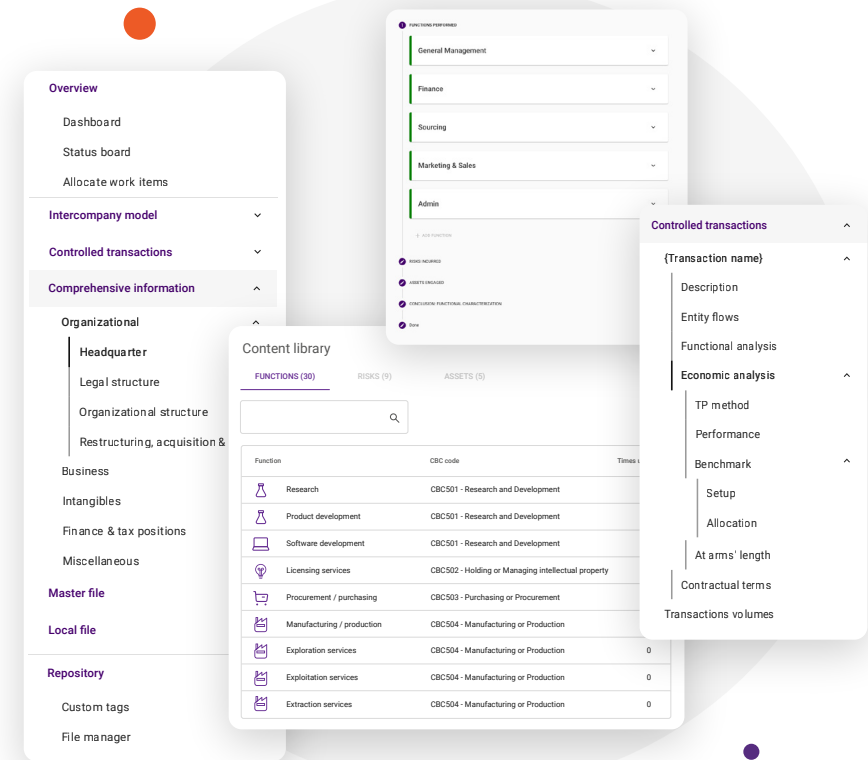# Save time and increase the quality by optimizing your process

TPdoc's workflow management features offers a series of sequential tasks that enable you to execute the transfer pricing documentation process. These features visualize the status of files, planning and preparer - reviewer role allocation. There is also deadline management and dashboarding for monitoring.
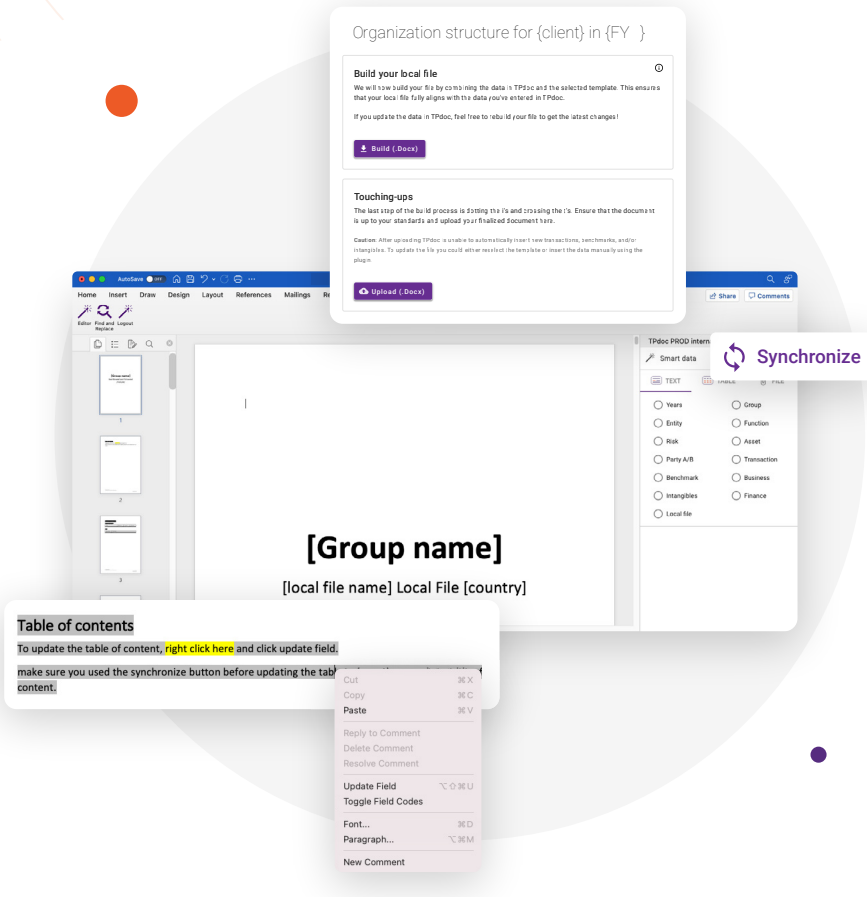
- Workflow management features for organized execution of the process, including notifications.
- Features to manage status of files, planning and preparer - reviewer role allocation.
- Deadline management and monitoring.
- One time setup of intercompany transactions overview, per fiscal year, saving time and resources.
- Roll forward feature copying data from the previous fiscal year, needing you to only update new information.
- Perform segmented P&L analysis, assess and test the performance per segment, and include the right audit trail within the local file

Step-up your quality standards to comply with the OECD standards

TPdoc offers a content library containing various types of reusable content (e.g., text cards for functions, risks and assets, standard annexes, and Master file or Local file templates). TPdoc also facilitates training and compliance with OECD documentation requirements.

- Content library for reusable content and consistency.
- TPdoc is structured to satisfy the OECD documentation requirements *(i.e., to be exact .. the OECD Transfer Pricing Guidelines for Multinational Enterprises and Tax Administrations 2017 Annex I and II to Chapter V. Transfer Pricing Documentation – Masterfile and Local file)*.
- Append specific descriptions and/or change qualifications for functions, risks and assets per local file. Adapt the local file to your own preferences.
- The tool intuitively guides you through each step and helps you get to the right conclusion, by showing you the relevant data points.

Automated master- and local file generation in MS Word, tailored to your transactions

TPdoc enables users to accelerate their master- and local file generation. TPdoc's file generator is a globally unique feature as it generates files in your trusted MS Word format. It is also dynamic as your (MS Word) files expand with more transactions. The easy to generate file template has the most current and updated changes each time.

All relevant (OECD Chapter V required) platform data populates in your file. Each transaction has its own chapter, e.g., in case of 5 intercompany transactions, 5 chapters will be inserted: one for each transaction.
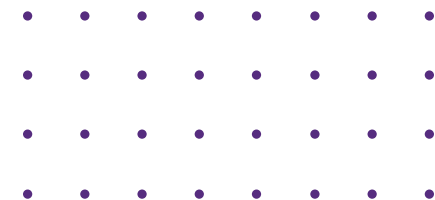
Find a plan that's right for you

Everything you need to scale-up, save time, and lift the quality of your TP documentation. Not sure which plan to go for? Talk to our Tax Technology experts today, schedule a brief check-in.

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Premium ★★

On Request

- ✓ Unlimited files
- ✓ Unlimited users
- ✓ Standard template
- ✓ In-tool training & onboarding
- ✓ Content library
- ✓ Standard support

Start Free Trial

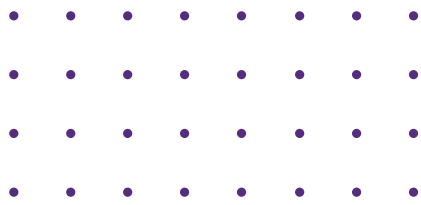Try TPdoc, 100% free, automatic cancellation

Enterprise ★★★

On Request

- ✓ All of Premium
- ✓ Bespoke templates
- ✓ Files onboarding
- ✓ TaxAcademy training
- ✓ Enterprise control
- ✓ Premium Support

Start Free Trial

Try TPdoc, 100% free, automatic cancellation

about

Simplified tax compliance for everyone!

We are here for the tax professionals who are on a mission to scale-up their practices, who hate doing repetitive workstreams manually, who believe in collaboration, want to step up their quality and leverage their resources, and who dare to stand out as innovators.

Over the past 10 years, we have serviced hundreds of clients, ranging from smaller intermediaries to some of the largest boutique firms, law firms, corporate service providers, accounting firms, and multinationals.

taxsuite, making tax transparent

We are working towards having a full suite of affordable standardised software solutions for international tax professionals. Solutions that reconstruct the tax concept to make it transparent. How? By showing that tax mechanics are actually very similar globally and by providing in-house tax support through coaching and by training people to become experts. We continuously focus on increasing business intelligence and transparency by ensuring our technology is beautifully designed, simple to use, and user-friendly.

About TaxModel

let's get started

Join our journey to Tax Advisory 2.0!

If you have any questions or are interested to learn more about TPdoc, please contact us through +31(0) 73 800 0030
or via mail: info@tax-model.com

Book a Meeting