

**York International**

York, PA  
www.york.com



**Year Founded**

1874

**Annual Revenues**

\$ 4,510.1 M (FY04)

**Number of Employees**

23,000 (2004)

**Industry**

Construction

**Sabrix Products Used**

- Sabrix Application Suite
- Sabrix Sales Tax
- Sabrix Consumers Use Tax

**Platform**

Siebel

## York replaces their manual tax determination processes with a state of the art tax automation solution

### The Customer

YORK International is the largest independent supplier of heating, ventilation, air-conditioning, and refrigeration (HVAC&R) systems and solutions in the United States, and a leading competitor globally. YORK designs, manufactures, sells, and services heating, ventilation and air-conditioning systems for residential and commercial markets; gas-compression equipment for industrial processing; industrial and commercial refrigeration equipment; and compressors for residential and commercial air-conditioning, as well as refrigeration applications.

### Tax Challenges

- Fully Automate transaction taxes for their new York Connect job estimate-to-invoice solution
- Eliminate transaction tax errors and the costs associated
- Remove dependency on the IT department for support and maintenance.

### Why Sabrix?

- Sabrix provides a consistent and accurate tax management solution to meet Sarbanes Oxley-level finance standards.
- Sabrix proved to facilitate audit support and administration with detailed and centralized documentation.
- Sabrix's change modeling and planning capabilities makes it easy to model the impact of policy changes.
- Sabrix Professional Services consultants were able to deliver deep product expertise and exceptional implementation services appropriate for York's business objectives without the need to involve a 3rd party tax consulting implementer.

### Business Benefits

- Reduced dependency on the IT department for support and maintenance
- Improved tax payment and accrual accuracy for use tax.
- Reduced risk and exposure tax payment and accrual accuracy for use tax.
- Sabrix Professional Services, as its sole implementation provider, York was able to save a significant amount of money in 3rd party implementation consulting costs.

## The Business Requirements

The Tax Department, IT department, and sales and service organizations were all heavily burdened with transaction tax issues and costs.

The Tax Department: Faced with an unacceptable transaction tax error rate in both overpayments and underpayments, YORK needed a solution that would eliminate the costs associated with these tax errors which were impacting both job margins and cash management. With YORK's legacy system, tax decisions were mostly manual. To assist sales and service personnel in making tax decisions, tax tables and tools were built, but, the legacy systems did not provide enough information to ensure accuracy and the time to build tools and provide training was too great. The tax department was spending far too much time correcting tax errors, attempting to recover overpayments, and making adjustments. YORK's tax department wanted a solution that would fully automate tax determination and be 100% accurate. To accurately determine tax, complex usage and product information was required beyond standard estimation-to-invoice information. This meant the tax solution must be capable of considering complex detail about each transaction in order to meet the accuracy requirement.

The Engineering Systems Group (ESG): The entire tax process placed a high dependency on IT – time required to develop and maintain custom code to support the tax department as well as maintain tax tools required by sales and service personnel was adding to an already overburdened ESG workload. ESG wanted a centralized tax solution that would seamlessly connect with the Siebel and Lawson applications running on their YORK Connect platform, would require no tax coding by IT, was based upon modern technology, and would require little to no ongoing IT support and maintenance.

The Sales and Service Organization: Sales and service personnel manually determined taxes, reducing their productivity and complicating their work processes. They required a fully automated tax solution that removed them from making tax decisions which ultimately made them responsible for tax accuracy and project margins.

## The Solution

Guided by Yetter Consulting, YORK selected The Sabrix Solution to fully automate transaction taxes for their new YORK Connect job estimate-to-invoice solution.

Today, Sabrix' Application Suite and Global Tax Research, combined with YORK's specific tax configuration populated into Sabrix provides automated tax determination - delivering accurate sales use tax determination and use tax accruals - for every project throughout YORK's entire job estimation-to-invoice process.

Yetter Consulting was instrumental in helping York handle the tax configuration and research appropriate for the combined Sabrix and YORK Connect implementation. "Bringing the Sabrix Solution into YORK is key to handling the tax requirements for all transactions accurately and ensuring compliance for YORK", said Diane L. Yetter, President of Yetter Consulting.

**The Future for YORK and Sabrix** YORK will continue the rollout of the Sabrix Solution, integrating Sabrix with other YORK business applications and extending the rollout to include international transactions. "We selected the Sabrix Solution, to help us facilitate and meet our taxation requirements, because it will be able to take in an unlimited number of data elements to determine the appropriate tax, and handle the calculation and recording for us", said Vicki Smith, Director of Domestic Taxes, York. "We also need a solution that can easily integrate with our customer relationship management initiative, YorkConnect, an application planned to manage and support our growing service business. After studying the alternatives, Sabrix is the best solution to handle our enterprise requirements for global transaction tax and is positioned to support our current and planned ERP and CRM solutions."

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