aws marketplace

Avalara

Reviews, tips, and advice from real users








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Contents

Product Recap . . . . . 3 - 4

Valuable Features . . . . . 5 - 12

Other Solutions Considered . . . . . 13 - 14

ROI 15

Use Case . . . . . 16 - 19

Setup . . . . . 20 - 21

Customer Service and Support . . . . . 22 - 23

Other Advice . . . . . 24 - 29

Trends . . . . . 30 - 31

About PeerSpot . . . . . 32 - 33

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Product Recap

Avalara

Avalara Recap

Avalara is an advanced tax automation solution designed to streamline the tax compliance process for businesses, ensuring accuracy and efficiency in tax calculations and filings.

Providing a comprehensive suite of tax compliance tools, Avalara caters to businesses needing reliable automation for diverse tax obligations. By effortlessly integrating with existing systems, Avalara addresses complex tax requirements, saving time and reducing risk associated with manual tax processes. This adaptability makes it suitable for companies seeking precision in their tax operations.

What are Avalara's most important features?

- Tax Calculation: Ensures accurate rate calculations across different jurisdictions.
- Filing and Remittance: Automates return filing and payment across multiple tax types.
- Document Management: Stores and manages exemption certificates, ensuring compliance.
- Integrations: Seamlessly integrates with popular business platforms and ERPs.

What are the expected benefits of Avalara?

- Efficiency Gains: Automates manual processes, reducing administrative burden.
- Risk Mitigation: Minimizes errors in tax reporting and compliance.
- Cost Savings: Reduces operational costs associated with tax management.

Avalara's solutions are particularly advantageous in industries like retail, e-commerce, and manufacturing, where it handles intricate tax requirements and jurisdictional complexities. By automating these processes, businesses can focus on core activities, knowing their tax compliance is reliably managed.

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Valuable Features

Excerpts from real customer reviews on PeerSpot:

- "Avalara has impacted my organization positively because when I started, we were at 11 to 13% compliance and we are at 99% tax compliance as of today."



Melissa Mather

senior accountant at a manufacturing company with 501-1,000 employees

- "Avalara has positively impacted my organization and my clients' organizations by helping them to get their hands around the indirect tax space and to have a tool that will do a lot of the calculation heavy lifting behind the scenes without a lot of interaction by them, and give them the reports and information that they need to file tax returns monthly with the various tax authorities."



Bryan Weaver

Tax/Tax technology consultant at a tech vendor with 10,001+ employees

- "What I appreciate most about Avalara, which I have been using for approximately three years, is its AvaTax product, which is excellent for calculating tax and making taxability determinations."



Steven Steinberg

Global Controller at a media company with 10,001+ employees

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"The automation is the most valuable feature, as I don't really have to do much manual work in my day-to-day with it and it just takes care of sales tax calculations for me, which is really nice."



Shelby Johansen

Senior Accountant at a tech vendor with 51-200 employees

"Avalara has positively impacted my organization, as sales tax calculations and sales tax compliance have increased dramatically since we have been using it."

Validated user

Manager, ERP Systems at a tech vendor with 1,001-5,000 employees

"All the features related to AvaTax are excellent in my experience, especially tax calculations."



Gabriel De Brito Coelho

Full stack developer at a consultancy with 1-10 employees

"When we have filed VDAs, AvaTax allows us to calculate correct taxes even for periods before we began using it."

Validated user

Contract Accountant at a tech vendor with 1,001-5,000 employees

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What users had to say about valuable features:

"The best features that Avalara offers are the integration into our NetSuite system so that the end users do not feel like they have to do anything. Using the actual system to get the sales tax certificates and keep track of those is also super helpful for our accounts receivable team.."

Validated user
Manager, ERP Systems at a tech vendor with 1,001-5,000 employees

Read full review

"All the features related to AvaTax are excellent in my experience, especially tax calculations.

What stands out to me about Avalara's calculations is how it handles taxes, performs calculations, is easy to integrate, and provides everything out of the box.

Avalara handles the complexities of multi-jurisdiction sales tax calculation, cross-border VAT, GST compliance, and exemption certificate management in a seamless way within my organization.."

Gabriel De Brito Coelho
Full stack developer at a consultancy with 1-10 employees

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"What I appreciate most about Avalara, which I have been using for approximately three years, is its AvaTax product, which is excellent for calculating tax and making taxability determinations.

Avalara integrates very well with other applications that I use, such as billing systems and e-commerce platforms.

Regarding my tax compliance workflows, it has significantly reduced the manual time and effort required.."

Steven Steinberg
Global Controller at a media company with 10,001+ employees

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“Avalara AvaTax:

1. Automating the calculation of the tax charged on invoices. AvaTax interfaces with our accounting system, Workday. With AvaTax, we are confident that we are charging the correct tax.
2. AvaTax files our returns. We usually do not have to do anything except to ensure the sales information is in by the deadline and enter "multiple points of use" credits.
3. Record keeping: Avatax has all the returns that they filed available online, complete with back up detail, invoices, which clients had exemption certificate, etc.
4. When we have filed VDAs, AvaTax allows us to calculate correct taxes even for periods before we began using it, such as in cases where errors (e.g., incorrect tax codes) were made.

Avalara CertCapture:

1. Keeps electronic copies of the exemption certificates.
2. Interfaces with AvaTax to ensure customers with valid exemption certificates are not charged tax(es).
3. Warns of expiring certificates.

In addition to saving a lot of time in day-to-day operations and return filings, both these products can be very helpful in a sales tax audit..”

Validated user

Contract Accountant at a tech vendor with 1,001-5,000 employees

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“The best features Avalara offers include the AI verification that helps with incoming certificates with CertCapture. That is very helpful. Tax rates and whatnot are automatically updated, so we don't have to keep track of all the different jurisdictions. We also use Avalara for 1099s, so it has been basically our source of truth and point of any type of tax compliance. As much as that we can do through Avalara, we use.

Regarding the AI verification with CertCapture, as far as that process changing my workflow, it cuts the time so that I'm not having to manually review. I am the only person with the company that manages it. So it definitely has shaved off time of the process of updating accounts. As far as the automatic tax rates, it has helped more, but I have also noticed that we have to make sure the addresses are USPS verified or sometimes those aren't completely accurate based on jurisdictions. But otherwise, that is the only error we have really seen so far.

Avalara has impacted my organization positively because when I started, we were at 11 to 13% compliance and we are at 99% tax compliance as of today. So it has been a huge improvement. Of course, that had to have some manual review, but for the most part, everything is managing itself within Avalara, other than quick updates.

To achieve that jump in compliance with Avalara, it was just basically being able to upload multiple certificates at a time and getting them attached to accounts. So doing the campaigns, running the email campaigns made that a lot easier than having to reach out individually to customers. .”

Melissa Mather
senior accountant at a manufacturing company with 501-1,000 employees

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“Avalara offers excellent features that include the ability to connect to a number of different ERP systems, especially the middle-market ones such as Microsoft Dynamics, NetSuite, and Epicor with a universal connector that they have. The first step of the integration is getting the plumbing in place, so to speak, to ensure a good round trip of communication, and then conducting the setup from there.

“Avalara's content includes not only rates but also the different tax rules that can be linked to drive the calculations, especially in the US by state, which vary from state to state, to correctly charge tax on those goods and services.

“My experience with Avalara's connectors and tax content reveals that they have a lot of tax rules for various situations that are being expanded all the time that can be linked. It is a matter of mapping and saving it and setting it up. Then there is no need to worry about maintaining that in the future as Avalara does so on a monthly basis. That is a great tool to have in place where the rates are not only updated every month but the tax rules as well.

“Avalara has what a lot of companies need to get connected and to get a system up and running where they can then manage it effectively because the tax laws across the different states are very different. There is no way to set up and maintain an internal system. An outside system and service is needed to help manage that aspect of the business.

“Avalara has positively impacted my organization and my clients' organizations by helping them to get their hands around the indirect tax space and to have a tool that will do a lot of the calculation heavy lifting behind the scenes without a lot of interaction by them, and give them the reports and information that they need to file tax returns monthly with the various tax authorities. This will hopefully make their lives a bit better and easier along the way.

“I have seen specific outcomes and metrics such as time saved, error reduction, and improvements in filing accuracy since implementing Avalara for my clients. I have seen all of the above: time savings, error reduction, and general better utilization of the tax department resources. Because tax departments in organizations are not overly staffed and are very thin to begin with, they really need to focus on higher-value planning ideas and focus on those things for the

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organization rather than just the compliance piece of getting information together at the end of the month and being able to file tax returns..”

Bryan Weaver
Tax/Tax technology consultant at a tech vendor with 10,001+ employees

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Other Solutions Considered

"I haven't used a different solution. I wasn't with the company when they chose Avalara, so I am not sure what options they would have chosen prior to that or reviewed.."

Melissa Mather
senior accountant at a manufacturing company with 501-1,000 employees

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"Avalara generally integrates very well with existing tech stacks such as ERP, e-commerce platforms, billing systems, or other AWS services. Every organization these days is not just an ERP system. There is always some kind of other order entry web system that needs tax calculation as well. The question is how that is going to be accomplished. Is it going to be through something such as a marketplace, or is it going to be a direct connection? That is always part of the initial questions, discussions, and how that is going to be architected.."

Bryan Weaver
Tax/Tax technology consultant at a tech vendor with 10,001+ employees

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"I have come into situations where clients had another solution and were going to Avalara or vice versa. From my perspective, it does not matter. I am very system agnostic. It really depends on the organization, what they have in place, what they are using, what they bought, and what they may want to use. A lot of it also depends on what they are familiar with and what they have used in the past. If I get in early to a project, I may help in going through that evaluation process and making recommendations. If they have already made that determination, then I will use whatever product they have decided.

"Before choosing Avalara, my clients and I evaluated other options, as there is always a handful of vendors that are evaluated in this case. As I said, it really depends on the organization, what they do, how they do it, where they do it, and the size of the organization as far as potential solutions. If it is a middle-market type of company, Avalara may be among the best solutions. If it is a large multinational global company, then it may be one of the other solutions such as Vertex or OneSource that is better suited for their needs.."

Bryan Weaver

Tax/Tax technology consultant at a tech vendor with 10,001+ employees

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ROI

Real user quotes about their ROI:

"I have seen a return on investment. We have not employed anybody else to manage the tax side of our business. It is just one person, and we have had three acquisitions since I came on with the company. So I have been able to manage that on my own without having to add any staff.."

Melissa Mather
senior accountant at a manufacturing company with 501-1,000 employees

Read full review

"I have seen a return on investment with Avalara, as it streamlines the monthly compliance process significantly, especially if using the Avalara tax service, where they will take the information from the system themselves and after the ninth month, they will run with it, file the returns, and make the payments in all the jurisdictions that have been enabled. This is a really great function to have because that takes the burden off internal staff and allows them to focus more on those higher-value-added tasks with the reconciliation and doing more research.."

Bryan Weaver
Tax/Tax technology consultant at a tech vendor with 10,001+ employees

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Use Case

"I use Avalara to calculate sales tax on our SaaS invoices. The system does it for me, so I don't have to spend a lot of time doing the complex calculations myself or looking into the different jurisdictions. It just takes care of it for me, which is really nice.."

Shelby Johansen
Senior Accountant at a tech vendor with 51-200 employees

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"Regarding my tax compliance workflows, there have not been any significant changes since I started using Avalara; however, it has significantly reduced the manual time and effort required.."

Steven Steinberg
Global Controller at a media company with 10,001+ employees

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"I have used Avalara a couple of times over the past years.

My main use case for Avalara is utilizing their sandbox and SDK for AvaTax.

I built a plugin in Ruby for AvaTax in the e-commerce platform called Solidus, which is a specific example of how I use the sandbox and SDK for AvaTax.."

Gabriel De Brito Coelho
Full stack developer at a consultancy with 1-10 employees

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"My main use case for Avalara is sales tax and sales tax reporting, which I rely on it for the most.

As a specific example of how I use Avalara for sales tax reporting, we use Avalara in NetSuite to automatically calculate our sales tax, and then our tax team uses it for the reporting for the different states that they have to file in, but I am not part of that process.

Avalara works seamlessly in our environment for calculating the sales tax.."

Validated user
Manager, ERP Systems at a tech vendor with 1,001-5,000 employees

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“My main use case for Avalara is reselling and drop shipments, so I handle certificate management.

For certificate management in my daily work using Avalara, we collect the certificates from the customers and then we load them into Avalara, verify that they're valid, and then we file our taxes every month through Avalara. So, when our transactions are filtered through at month-end, then we see if that aligns with the certificates that are on file to make sure that all accounts were taxed appropriately. And if they weren't, then any outliers, we reach out to the customer. .”

Melissa Mather
senior accountant at a manufacturing company with 501-1,000 employees

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"My main use case for Avalara focuses on the indirect tax and tax technology space, integrating products such as Avalara and their competitors, including Vertex, OneSource, and Sovos, with different ERP and billing systems for indirect tax calculation and reporting functionality, not only in the US but worldwide as well.

"A specific example of how I have used Avalara in one of my projects is that I integrated Avalara with NetSuite ERP for indirect tax functionality in the US and Canada for a manufacturer of items used by other manufacturing companies for their grinding and similar needs.."

Bryan Weaver
Tax/Tax technology consultant at a tech vendor with 10,001+ employees

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Setup

The setup process involves configuring and preparing the product or service for use, which may include tasks such as installation, account creation, initial configuration, and troubleshooting any issues that may arise. Below you can find real user quotes about the setup process.

"The initial deployment of Avalara was straightforward for me.

It took me a couple of months to fully deploy Avalara and become fully acquainted with it.."

Steven Steinberg

Global Controller at a media company with 10,001+ employees

Read full review

"My experience with pricing, setup cost, and licensing with Avalara was positive because I wasn't the one that set it up. I wasn't with the company at that time, but I did do the renewal and everything ran smoothly. Everything was explained in-depth as to whatever we needed assistance with understanding. So there weren't any concerns there at all.."

Melissa Mather

senior accountant at a manufacturing company with 501-1,000 employees

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“Regarding Avalara's capabilities, I think the accuracy and reliability of output are commendable as the output for the different functions is as good as or on par with any kind of competitor. I have not seen any real issues regarding calculation or reporting that would indicate an issue, error, or incorrect content with the system. Avalara keeps those rates and rules updated that can be used in the system and provide accurate results with it.

“Since implementing Avalara, the changes in the time or effort required for my tax compliance workflows are significant. Because the monthly updates are automatic and the user does not have to do anything, the focus is on updating it for any kind of exemptions. For example, customer exemptions occur all the time. There has to be a process internally on who is going to get that information and get that entered into Avalara. Is it going to be a customer service group, is it going to be a master data group, or is it going to be the tax team that does that? And then as well as for products, when products get added, who is going to do that kind of update and how is the tax team going to get looped into doing the research and mapping for any new products into the system?.”

Bryan Weaver

Tax/Tax technology consultant at a tech vendor with 10,001+ employees

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Customer Service and Support

“I have not contacted Avalara's technical support directly, but members of my team have contacted them and have not experienced any issues. I find the technical support to be helpful..”

Steven Steinberg
Global Controller at a media company with 10,001+ employees

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“Technical support is excellent. However, some of the issues can be quite complicated. The first line of support personnel may not always know the answers (e.g., Chicago Lease Tax)..”

Validated user
Contract Accountant at a tech vendor with 1,001-5,000 employees

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“Their support team is not responsive and kind of avoids my questions when I'm asking. Definitely upgrading their support system would be appreciated.

On a scale from one to ten, I would give them a two..”

Shelby Johansen
Senior Accountant at a tech vendor with 51-200 employees

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"I wish we would have phone support, but for the most part, there have been a few times where I have had to re-explain what the issue is or they were trying to close my cases before they were resolved. And so in those situations, of course, it gets a little frustrating, but overall, we have had a good experience with customer support. We do end up getting the resolution we need.."

Melissa Mather
senior accountant at a manufacturing company with 501-1,000 employees

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"Customer support from Avalara could use some work. In past integrations, finding a customer support number is very difficult. Substantial effort is required to locate it on the website. A chat option is available, which may or may not be very helpful. The log a support case function must be found, which is also buried. Going back and forth with support, sometimes answers received are just not very helpful at all. Avalara really could use some help to bolster that customer support team with people that are more knowledgeable.."

Bryan Weaver
Tax/Tax technology consultant at a tech vendor with 10,001+ employees

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Other Advice

"On a scale of one to ten, I would rate Avalara an eight. I give it an eight as a solid rating because it has really improved our business when it comes to the sales tax aspect, but it is not a ten because there are still some things that the team would like to see worked out.."

Validated user
Manager, ERP Systems at a tech vendor with 1,001-5,000 employees

Read full review

"Pay close attention to detail. It can only give you good results if you put in the correct information both in setting up the system and providing the sales and exemption information (jurisdiction nexus type of tax, dates, etc.). Use their support as they are very helpful.."

Validated user
Contract Accountant at a tech vendor with 1,001-5,000 employees

Read full review

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“Avalara does not require any maintenance on my end.

The Avalara products I purchased include AvaTax and Managed Returns.

Concerning Avalara's features for multi-jurisdiction sales tax calculations, cross-border VAT, and GST compliance, we have not used the cross-border product. As for the other features, we do not utilize any of those.

I would rate this review a 9 out of 10..”

Steven Steinberg
Global Controller at a media company with 10,001+ employees

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“I am not certain how Avalara has impacted my organization positively because I lack that visibility.

I am not sure if I am qualified to answer questions regarding Avalara's AI capabilities in governance and security.

I have not used Avalara's AI capabilities, so I cannot comment on the accuracy and reliability of output.

I am not certain how Avalara is deployed in my organization because I am not responsible for the deployment.

I do not have specific changes to describe regarding the time or effort required for my tax compliance workflows since implementing Avalara.

Avalara does not influence the financial operations of the company I work with, including aspects such as audit preparation, resource allocation for compliance tasks, and accuracy of tax filings.

My advice to others looking into using Avalara is to review the documentation and proceed with confidence that it will resolve your problem. I would rate this review a ten out of ten..”

Gabriel De Brito Coelho
Full stack developer at a consultancy with 1-10 employees

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“Avalara is a good product out of the box that will help to get set up in a relatively short period of time and it provides the content that allows setting up a system that addresses the needs of most businesses. It provides a lot of good out-of-the-box content that can be utilized without having to do any real kind of user-defined customizations or having to do any real kind of development to get the integration

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in place to start with.

“Regarding Avalara's governance and security, they are strong since Avalara is and has always been a web-based product, so the functionality there and the ability to access it is paramount in those kind of environments. There have not been any real issues regarding security concerns, and when the system is unavailable, it only occurs for short periods of time.

“Avalara has influenced financial operations positively by providing standard reports and custom reports that are available, allowing users to get all the transaction detail needed out of the system. Not only for reporting purposes, but down the road for audit support purposes as well. It is possible to actually download a period of time for specific jurisdictions and then send that off to a state auditor, for example.

“The impact Avalara has had on my organization's process for monitoring and adapting to changes in tax regulations across different jurisdictions has been quite positive. It has made that more streamlined in that the changes for a given month can be looked at and what potential changes might affect the organization and the goods and products that they sell can be seen.

“My advice to others looking into using Avalara is to really look at the organization, what they are doing, where they are doing it, and how they are doing it to make an effective evaluation. Then really look at the long term and what the end result of the system and architecture is going to be with the organization, whether it is global and what that end state is going to be like to select a tool that can be implemented now and be able to work with and use and be happy with later on. Overall, I would rate Avalara as an eight out of ten..”

Bryan Weaver
Tax/Tax technology consultant at a tech vendor with 10,001+ employees

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“Regarding the integration of Avalara with my existing tech stack, there are

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integration challenges currently. We use Visual Info for the ERP, and even though we are updating to version 11, Avalara still does not communicate both ways, meaning we can't do a sync and have everything update between both programs. So it still has to be done manually on the other side. It's working well as far as transactions and doing tax returns, but it would be really nice if we had an ERP system that communicated better with Avalara and vice versa.

Regarding my tax compliance workflows since implementing Avalara, it would usually take me almost two weeks to get through all the customers when our compliance was 11 to 13%, all of the outliers and tax certificates, of course not being exemption certificates, mind you, not being loaded and things of that nature. And then now, I can have month-end done within the three-day close and have the tax part taken care of. So it has been a huge improvement on time frame.

Avalara has influenced my financial operations significantly, considering aspects of audit preparation, resource allocation for compliance tasks, and accuracy of tax filings. I think it has improved all those areas. Definitely our accuracy. For audit, I did not have anything come back to me for audit on a sales tax basis. So overall, we rely on it heavily and it is working well.

The impact Avalara has had on my organization's process for monitoring and adapting to changes in tax regulations across different jurisdictions is significant. Avalara has basically managed that for us. So we get notifications, of course, from the different states or different jurisdictions. I keep record of those notices. If there is anything or discrepancies in any returns, I submit them through Avalara and have those support cases created and get those responses. But for the most part, it is an automatic process. I haven't had any huge discrepancies.

My advice to others looking into using Avalara is to encourage them to make sure the ERP system that they are using works well with Avalara. Avalara is a great tax compliance management application, but if they really are leaning to have the management and that communication between the two, that efficiency really depends on the ERP system as to what works well. And I would make sure that that is at the forefront because if I would have been with the company at the time that Avalara was chosen, even though I love Avalara, I probably would have had a

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different solution for the ERP system they are using for the manufacturing. I would rate this review as a 9 out of 10. ."

Melissa Mather
senior accountant at a manufacturing company with 501-1,000 employees

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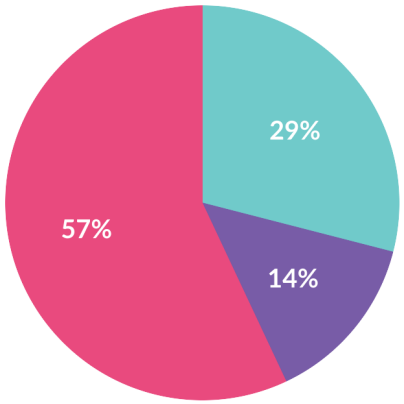
Top Industries

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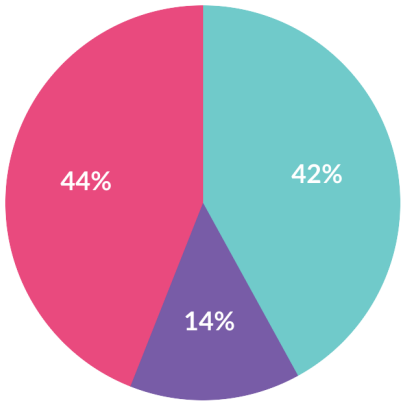
Outsourcing Company	15%
Manufacturing Company	14%
Financial Services Firm	13%
Retailer	7%

Company Size

by reviewers



by visitors reading reviews



Large Enterprise Midsize Enterprise Small Business

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PeerSpot

244 5th Avenue, Suite R-230 • New York, NY 10001

reports@peerspot.com

+1 646.328.1944

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