Tax Credits & Incentives Management System

Incentify Primer for Ryan Clients

OCTOBER, 2020

incentify
The World's Most Powerful C&I Platform
x
Ryan

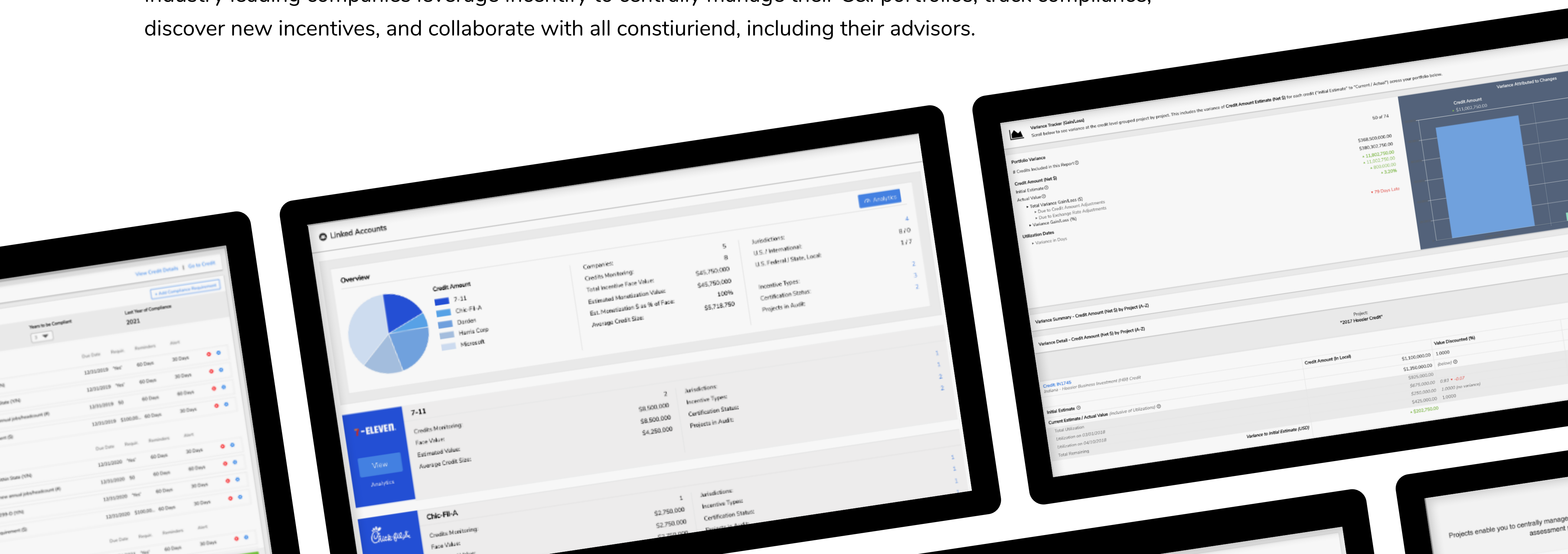
Welcome to Incentify

This primer will help walk you through the Incentify Tax Credits & Incentives Management System which you now have access to through the relationship you have with your advisory firm Ryan. If you are reading this document you already know that Ryan has adopted Incentify as its technology solution to ensure that your company maximizes the value of your C&I portfolio by introducing greater efficiencies.

What is Incentify?

Incentify is the world's Incentify is the world's most powerful enterprise tax credits and incentives platform.

Industry leading companies leverage Incentify to centrally manage their C&I portfolios, track compliance, discover new incentives, and collaborate with all constiuriend, including their advisors.



Getting the Most Out of Incentify

Collaboration with Ryan provides efficiency and visibility

STEP 1

Your project/C&I data is entered and managed by Ryan

STEP 2

WF and Compliance playbooks are established by Ryan

STEP 3

Monetization schedules created in conjunction with Ryan based on your capacity

STEP 4

You can see Portfolio Analytics and run Reports

STEP 5

You and those on your team who have access can leverage real-time information

C&I Lifecycle Management Best Practices

10-Step Incentify Process

1. Activate your account
2. Get familiar with how to navigate Incentify
3. Access Projects and C&I that Ryan is managing for you
4. Track processes and tasks through the "Workflow" tool
5. Monitor regulatory requirements through the "Compliance" tool
6. Share "Documents" in the centralized repository
7. Identify your monetization schedules through the "Utilization" tool
8. View "Analytics" and better understand your data
9. Run "Reports" to get information out
10. Discover how you can get more out of Incentify with your own company account

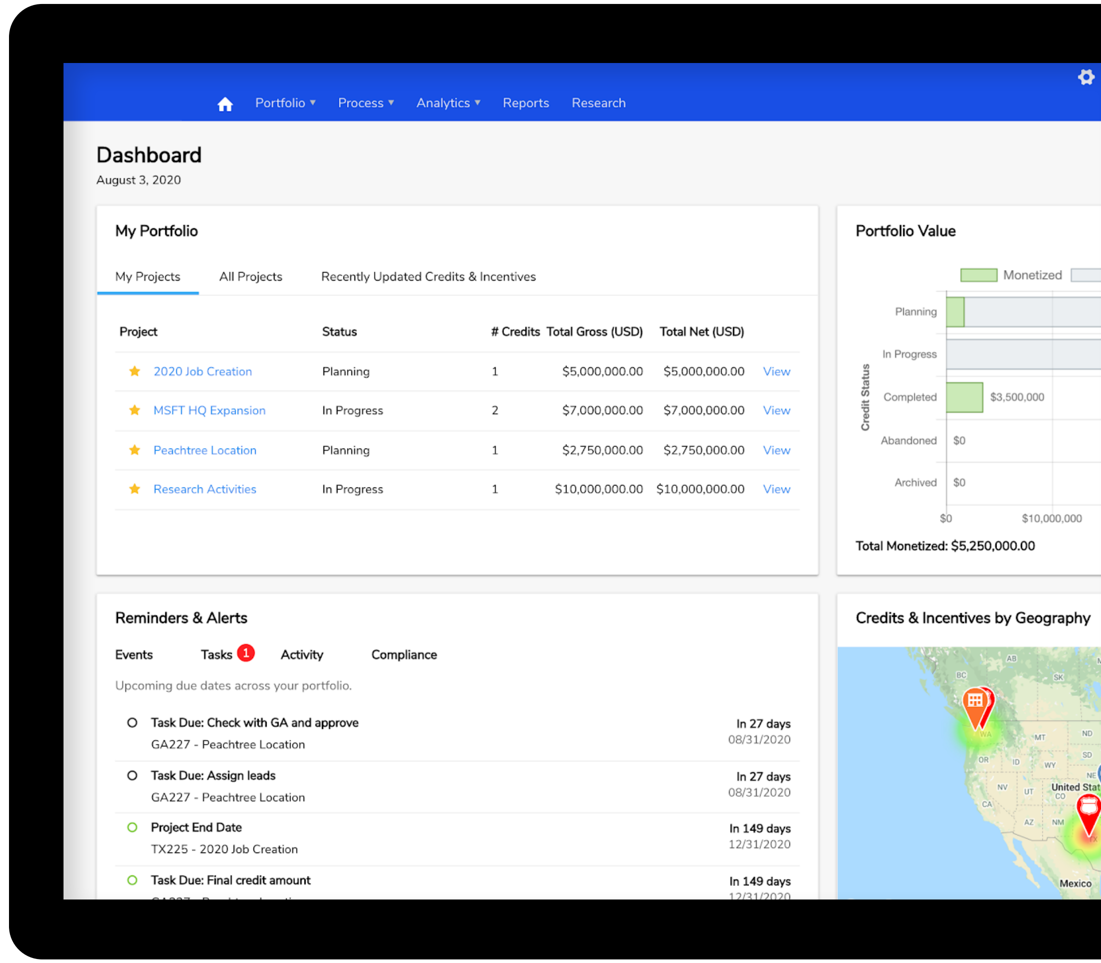
Quick Start Guide

Main Dashboard

Home

Getting around Incentify is simple! From the main Dashboard (Home) you can view a snapshot of current account activity and navigate to key areas of your system.

Information provided in the Dashboard will simplify your daily routine by providing critical information at your fingertips.



General Navigation

How to Get Around

Administrative Management
- User Access
- Legal Entity Management
- Site Management
- Customize Default Settings
- Custom Data Points
- Security Settings
- API Manager

Quick Nav
- Calendar
- Activity Alerts
- My Tasks
- Compliance Alerts

Personal Settings
- My Settings
- Help Center
- Logout

Portfolio
- Projects
- Credits
- Utilizations
- Heat Map
- Credits You Recently Viewed

Process
- Workflow
- Compliance
- All Tasks

Analytics
- Portfolio Summary
- Utilization History
- Utilization Forecast
- Utilization Summary
- Variance Tracker
- Performance

Reports
- Create Reports
- Report Library

Research
- CCH Intelliconnect Suite
- Incentify Dynamic Discovery Tools

Project Level Management

“Project” information

STEP 1

View “Projects” Created by Ryan

Ryan will establish your Projects based on their engagement with you. Projects are assigned a “name” to make it easy to track single or multiple incentives associated with the same project and assists in filtering, reporting and analyzing.

STEP 2

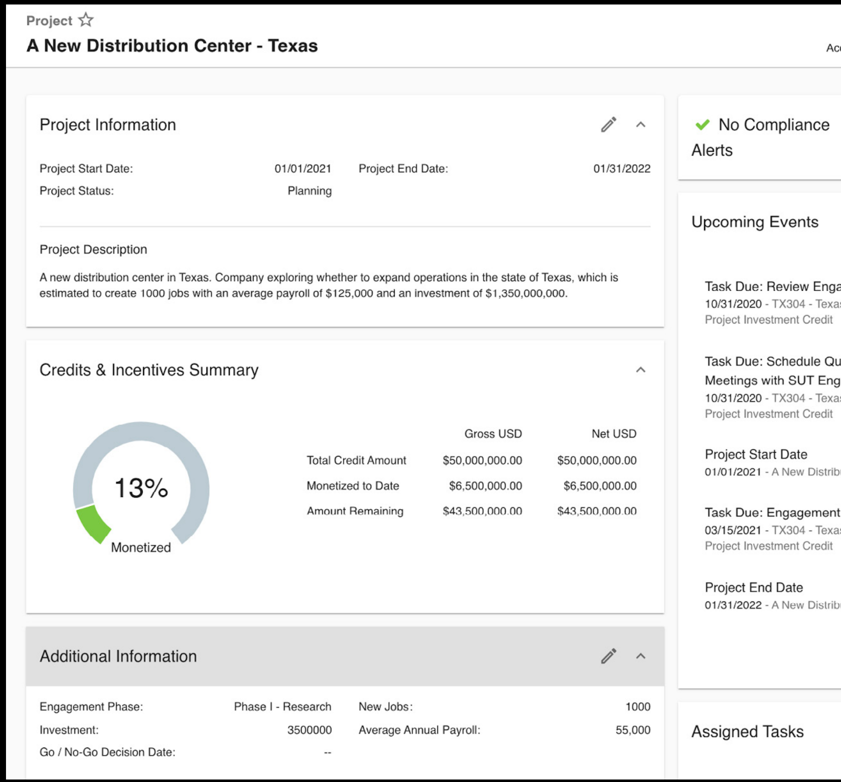
Track Aggregated Information

Data and information relating to a Project is centralized in a simple to navigate “Project Dashboard” to easily see everything you need to know about the Project. From this dashboard you can view comprehensive summaries and valuable details relating to a variety of pertinent data.

STEP 3

Monitor Project “Status” and Phases

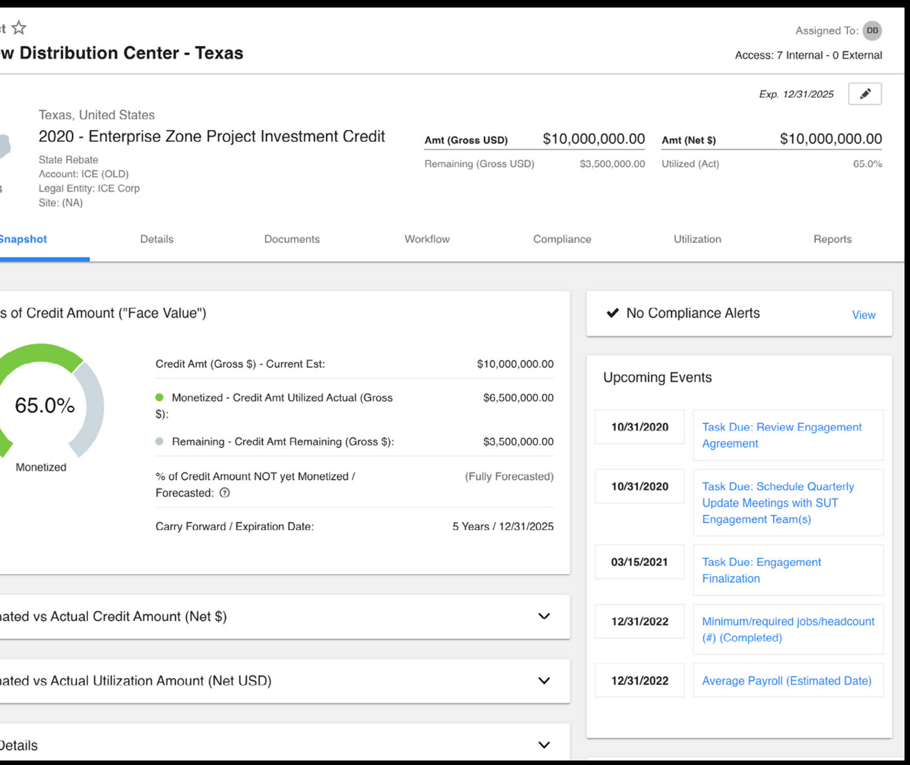
The “Project Status” field will assist you to track the progress and various stages of the engagement with Ryan and their C&I team.



“Project Dashboard”

C&I Asset Management

“Credits & Incentives” Information



“Credit Dashboard”

STEP 1

View Credits Created by Ryan

Ryan will establish your C&I and from the Credit Dashboard you can access all information relating to the C&I, including asset value, monetization schedules, key dates and deadlines, and more.

STEP 2

Track C&I Information

Data and information relating to a C&I is centralized in a simple to navigate “Credit Dashboard” to easily see everything you need to know about the Project. From this dashboard you can view comprehensive summaries and valuable details relating to a variety of pertinent data.

STEP 3

Monitor C&I Details

The “Credit Status” field will assist you to track the progress and various stages of the C&I throughout its lifecycle.

Workflow

Workflow Tools to Manage Work Plan Tasks

STEP 1

Workflow Templates

Ryan's Customized Workflow templates are based on work plan processes to support project and credit-level practices, and help form the playbook to efficiently manage C&I assets. At the credit level you can monitor (and collaborate with Ryan) the step-by-step procedures.

STEP 2

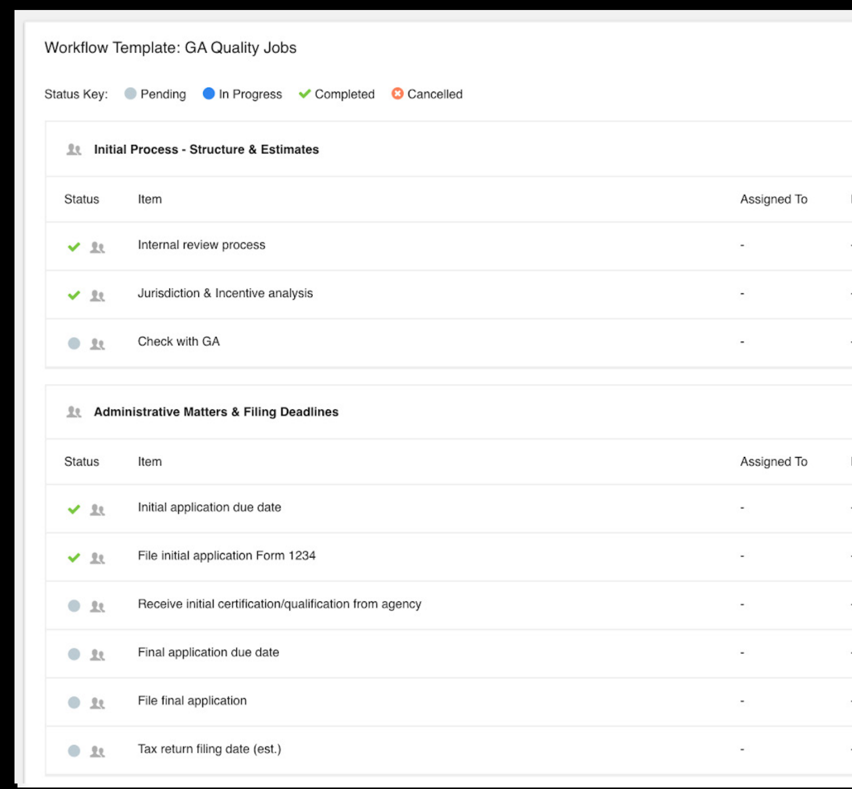
Templates to C&I Programs

When Ryan "Tags" a Workflow template to a C&I they establish program-specific processes to best assess, procure and secure C&I on your behalf.

STEP 3

Manage Work Plans and Tasks

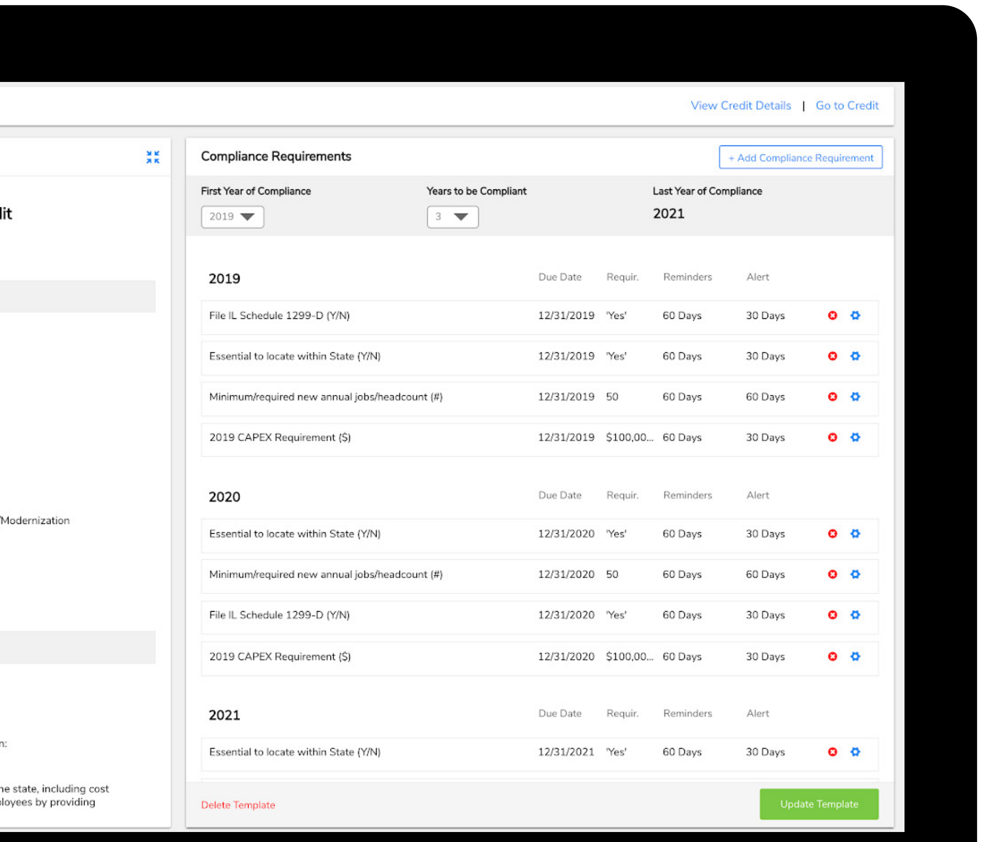
The Workflow tool provides the ability to assign tasks to - internally within Ryan and/or externally with your company - and all date fields associated with automatically hit the Incentify Calendar tool and trigger reminders and alerts.



"Workflow" Tool

Compliance

Compliance Tools to Manage Regulatory Requirements



"Compliance" Tool

STEP 1

Compliance Templates

Ryan's Customized Compliance templates are based on processes relating to satisfying regulatory compliance thresholds and contractual agreements, and the Incentify System will provide automated reminders and alerts to achieve certain benchmarks.

STEP 2

Templates specific to C&I programs

When Ryan "Tags" a Compliance template to a C&I they capture the terms of the program and government contract establishing the roadmap to comply throughout the obligation.

STEP 3

Manage your compliance work plan and tasks

The Compliance tool provides the ability to assign tasks to - internally within Ryan and/or externally with your company - and all date fields associated with automatically hit the Incentify Calendar tool and trigger reminders and alerts.

Document Management

Centralize & Consolidate Important Historical Records

STEP 1

Centralized Document Repository

Index and store documents relating to a specific project and/or C&I and store them in a central repository. Share documents with the Ryan team and easily access what you need!

STEP 2

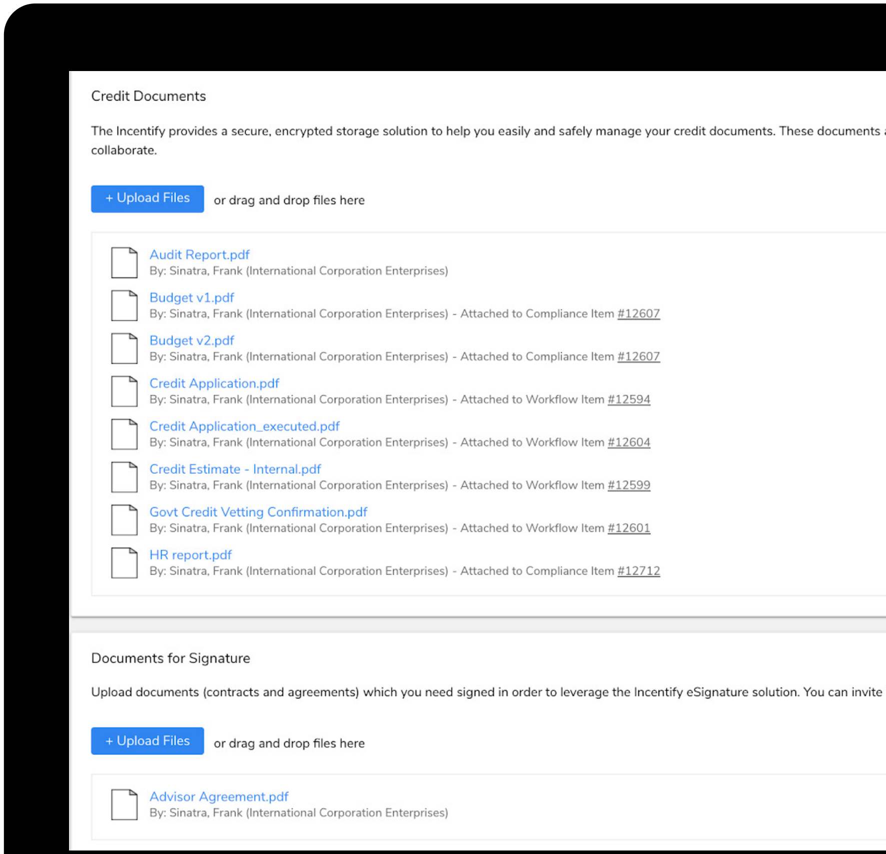
Multiple Entry Points to Upload & Share Documents

There are many places throughout the system to support the uploading of documents - in the main repository or through the Workflow and Compliance tools - and all documents will live in the centralized repository.

STEP 3

Automated Feature for Execution & Signatures

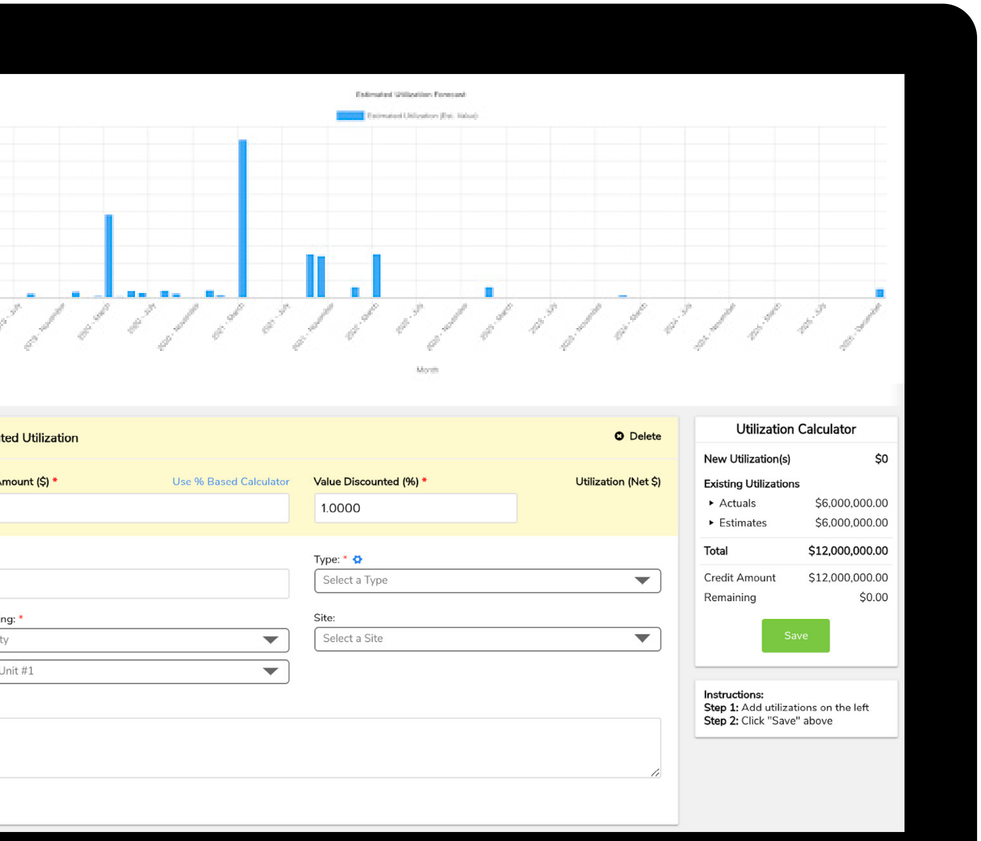
Leverage our automated tool at the credit-level to send documents out for signature and manage the execution process throughout the lifecycle of a C&I.



"Document Repository"

Utilization

Valuation & Monetization Tools for Credits & Incentives



“Utilization” and “Forecasting” Tool

STEP 1

Estimating C&I Value and Benefits

Forecast (or record actuals) of when and how you plan to monetize C&I. Forecasts can be converted to Actuals, and all monetization data at the credit-level feeds into your Analytics module and all of its features.

STEP 2

Determine Exactly How Incentives Are Monetized

With great precision you can determine exactly how an incentive will be monetized (i.e. applied against liabilities, rebates/refunds/grants/sales-transfers, etc.) and when (date) and whom (legal entity, business unit, etc.) will be the benefactor.

STEP 3

International C&I Benefits

Should the need arise, Incentify supports managing monetization in any currency through our FX Management tools.

Analytics

Understanding & Interpreting Your Data

STEP 1

Review Portfolio Summaries & Detail

Top level and deep-dive features to analyze Project and C&I data at a glance, and access Incentify's vast tools to learn from your data. Analyze historic and current economic factors, and filter and sort to gain precise and desired data.

STEP 2

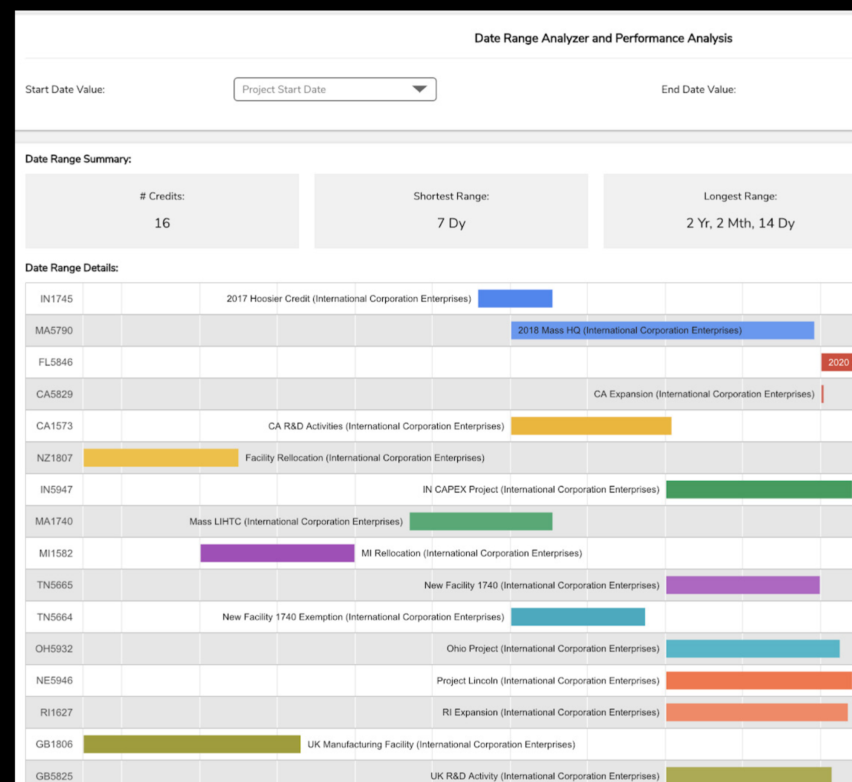
Analyze Financial Impact: Forecasts/Actuals/Variance

Monetization of C&I assets are managed through the "Utilization" tool where you can track forecasts or actual usage of C&I and its financial impact, and through our suite of analytics tools you can isolate specific trends and learn from your history, including identifying the delta.

STEP 3

Measure Performance

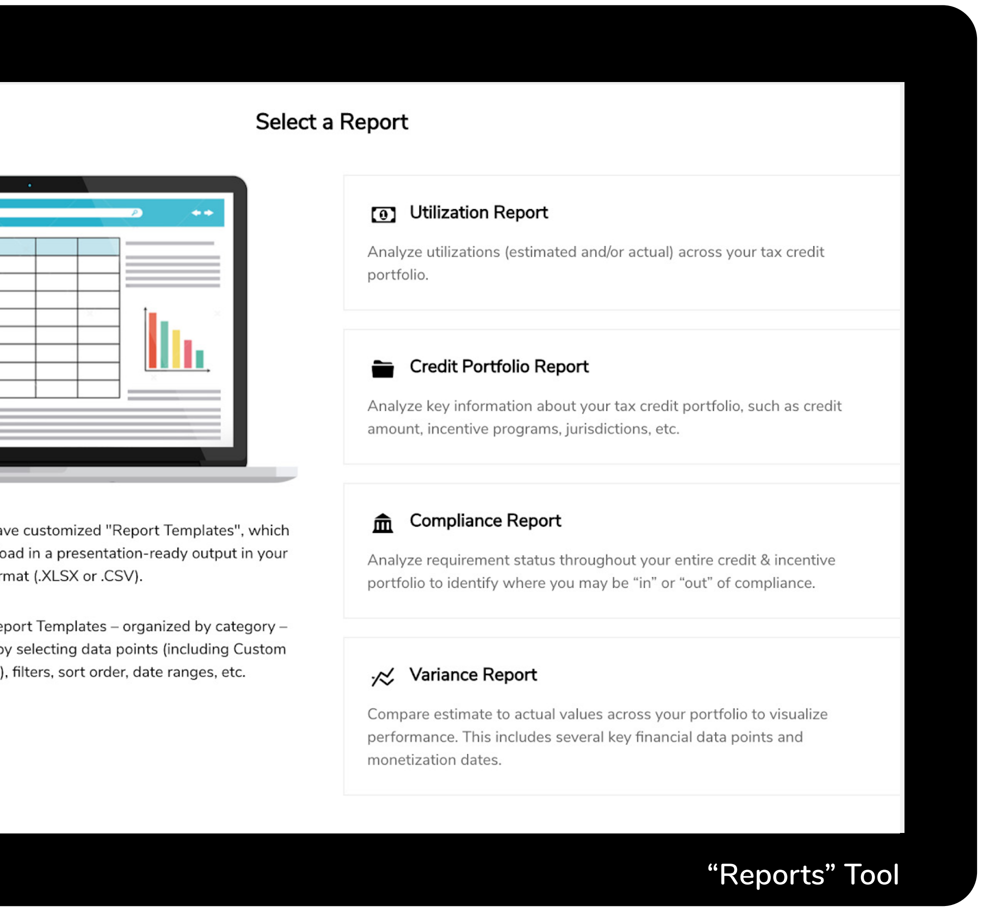
Incentify's Performance tool enables you to analyze "date-related" events against one another in order to support future planning, forecasting a decision-making.



"Analytics Performance" Tool

Reporting

Extracting Your Data



“Reports” Tool

STEP 1

Determine a Desired Report Type Category

To begin building a report template choose from four key categories, and within a category you can select a quick-start template from which to then customize.

STEP 2

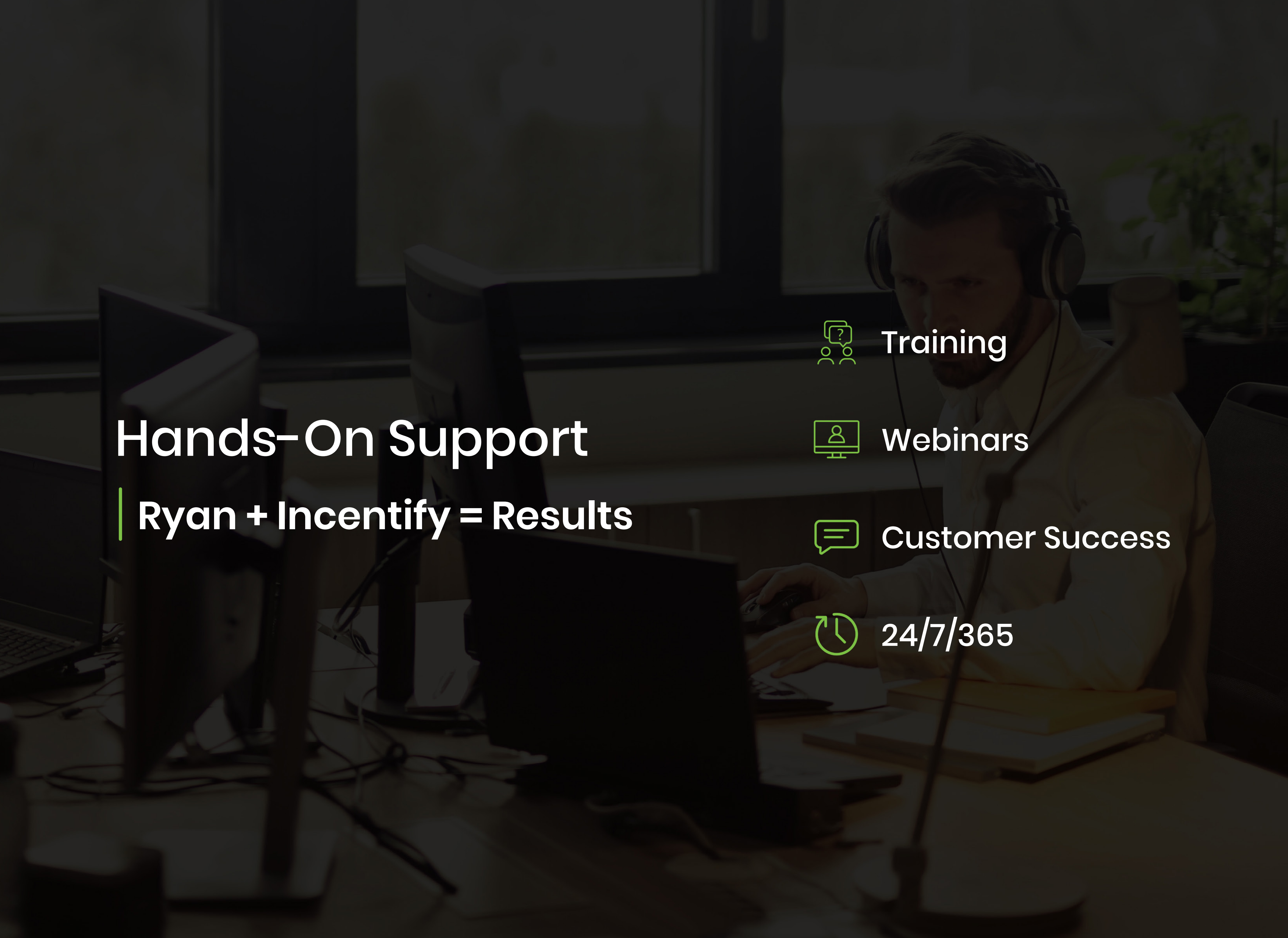
Customize Your Report Template

Once you’ve selected the desired Incentify form template you can modify the data points - and/or date range values - to be included in your report. Choose from the myriad of default data values and/or include any Custom Data Points that you may have created.

STEP 3

Run, Review and Schedule Recurring Reports

Run a report on an ad-hoc basis, or use our tool to schedule an automated report to be generated at a specific time frame and distributed to a group which you can determine. Automated reports will be sent to your distribution list, and a PDF of that report will be automatically stored in the report “Library” for future reference.



Hands-On Support

Ryan + Incentify = Results

- Training
- Webinars
- Customer Success
- 24/7/365

Do More With Incentify

Realizing the entire value of your C&I means using Incentify for your entire C&I portfolio. Whether you have additional C&I managed internally or by advisors other than Ryan, contact us today to centralize all of your C&I onto the Incentify platform to benefit from all of the system's features and capabilities.

To learn more, please contact us at
support@getincentify.com