



Post MVP V1.1  
Initial Research  
Order Up!

# Tax Exemption

# Table of Contents

- Situation
- Research Findings
- Analysis
- Next Steps
- Q&A / Appendix

# Situation

- Order Up! Launched MVP of Tax Exempt on total cart 2 years ago.
- We receive numerous feedback around Tax Exemption in Usabilla **(Top 3 Pain Point in OU!)**
- Now it's time to take a look at how we can improve our tax exempt experience.

Tax-Exempt Change

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Cart (1 Items)

Subtotal:	\$4.96
Discounts:	-\$0.00
Estimated Tax:	\$0.30
Tax Exempt (Disqualified):	<input type="checkbox"/>

Order Total: \$5.26

[Proceed To Checkout](#)

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## Key Stats

3.9%

Orders/1WK  
Are Tax Exempt  
(8k/186k)

1/25

Total Orders  
Are Tax Exempt  
(8k/186k)

1/200

Orders Total  
Are Tax Exempt & Sent  
to ESVS (0.49%)

1000

Orders/WK  
Are Tax Exempt & Sent  
to ESVS

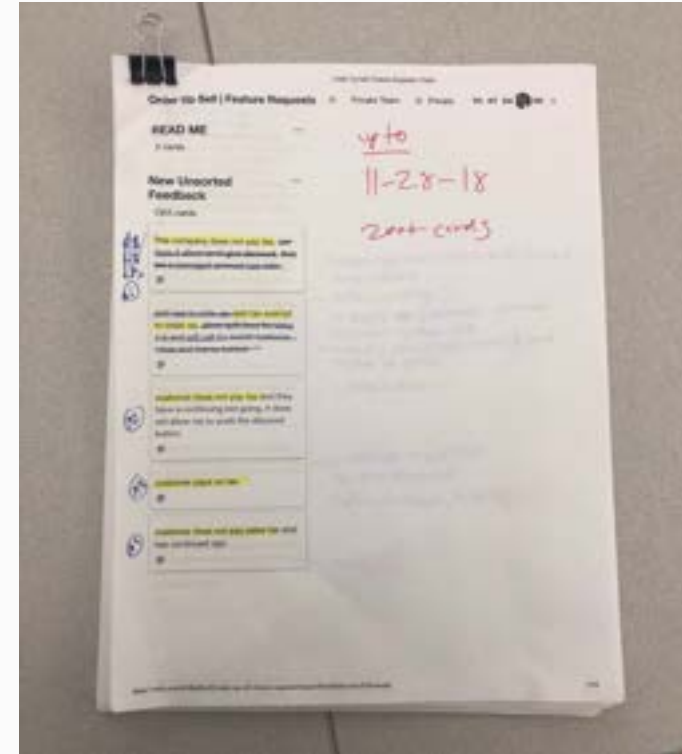


*"We are unable to do tax exemption through the system (OU!) and most of the time the customer doesn't say anything until it's time to pay, and we have to start all over."*

-Store Associate OU!

# Exploratory Research

- Synthesized Usabilla Feedback to determine what the highest frequency pain points are in Order Up.
- Reviewed Tool Rental Usabilla Feedback
- Got input/observed various THD teams
  - OU!
  - Tool Rental
  - Self Check-Out
  - Paint
  - SVOC
  - Financial IT/ Tax Commons
  - Orange Pay
- Competitor Research
- Catalogue Current State/Map
- Workflow Chart of Tax Exemption in OU!

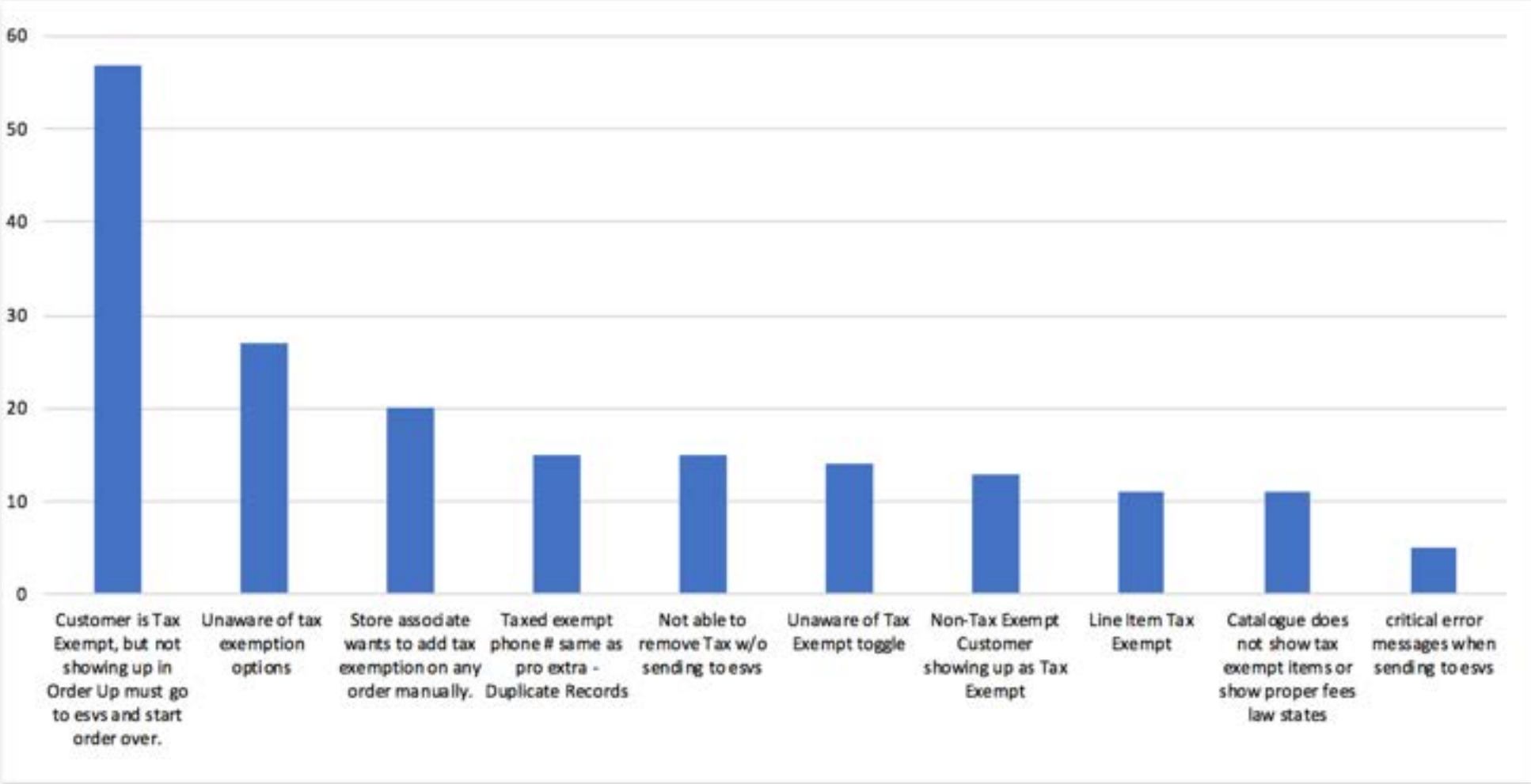


**217+** Order Up!  
Usabilla Feedback

**83** Tool Rental  
Usabilla Feedback

**7** The Home Depot Teams  
Input

# Top Tax Exempt Pain Points in OU!



# *What is the experience like throughout The Home Depot?*



## **PRODUCTS THAT SEARCH BY PHONE #**

- ESVS/ORDER UP
- PAINT (ESVS)
- SELF CHECK OUT



## **PRODUCTS THAT SEARCH BY THD TAX ID#**

- TOOL RENTAL
- HOMEDEPOT.COM
- POS (CARD(S) OR MANUAL)



## **PRODUCTS THAT STORE TAX INFO**

- PRO XTRA (STATE TAX IDS)
- TAX EXEMPT REGISTRATION
- HOMEDEPOT.COM USER ACCOUNT



## **PRODUCTS FOR CUSTOMER SUPPORT**

- OCC – TAX EXEMPT HOTLINE
- GOVERNMENT BUYERS FAQ (.COM)
- PRO HOME PAGE / TAX EXEMPT PURCHASES

# *How should we be searching? (THD TAX ID #)*

## **PROS**

- ✓ Most accurate way of searching for Tax Exempt status.
- ✓ Is located on the card, given to THD Tax exempt customers via email/mail after they are approved.
- ✓ Help documentation on .com references using the THD Tax Exempt ID at check out primarily, Which would create a consistent experience with online help documentation.

## **CONS**

- Mass majority of customers do not know their THD Tax ID#, or how to recover it (As seen on tool rental feedback).
- Customers who choose to use the paper card are uncommon. (Can not laminate the card)





# How should we be searching? (PHONE #)

## PROS

- ✓ Easily remembered by customers.
- ✓ Expected interaction for associates and customers in Order Up/ESVS/Paint
- ✓ Help documentation on .com refers to searching by phone # in the case that the customer doesn't know their THD Tax ID info.

## CONS

- Due to phone number's in CGR overlapping with phone numbers from SVOC – multiple accounts are showing up and Tandem won't recognize it. (AKA: Tax exempt customers are not showing up tax exempt in OU!
- 1/200 orders are being sent to ESVS in the current state.

***\*This will most likely resolve by end of 2019***



# User/Team Feedback

- Storing a state tax ID (non THD Tax ID) uses PII, since that # could be a Social Security Number. –**SVOC (Pro Xtra)**
- THD Tax IDs are randomly generated, encrypted and are 10 digits. They used to be 6-10 digits & customizable. They aren't like that now but we still allow users to use their old accounts. – **TAX COMMONS**
- THD Tax IDs expire & need to be renewed, customers will receive emailed updates re: disqualification. – **TAX COMMONS**
- There is a phone # to call in case a customer needs customer support - (877) 434-6435 Option 4, Option 6. – **TOOL RENTAL**



*“Tax exempt customer account does not work when a customer has more than one tax exempt profile under one phone number.”*

**-Store Associate OU! - (57+ Pain Points / 2yrs)**

# User/Team Feedback – (Cont.)

- Do not have the current capability to pull an exact reason for disqualified Tax Exempt Status, so customers must call hotline. – **TAX COMMONS**
- New customer search forces purchasers to use same statuses as the customer (Tax Exempt, Pro Customer etc). They are not independent. – **ORDER UP!**
- Customers can check out normally and get a refund for the tax and a receipt that says \$0.00 for tax purposes, if they come back with a valid THD Tax ID. – **PASA**



*“We need a way to SEARCH the customers tax exempt number. Almost all of our customers have NO IDEA what their HD tax exempt number is and when we are finishing and processing the transaction you CANNOT SEARCH by phone number. This is causing issues. Thanks!”*

**-Tool Rental Associate (27+ Pain Points / 3 Months)**

# Growth Opportunities- Tax Exempt in OU! Current State.

## OPPORTUNITIES

- Observational/Exploratory Research on Phone# search vs Tax ID# search (**28 Users** reported Customers don't know their THD Tax Exempt ID Info and need a way to look it up by phone# search) **X**
- Make the Toggle/Tax Exempt status more clear. UI Improvement. (**17 Users**) **Y**
- Add line item Tax Exemption (**11 Users** Requested this – Current workaround is creating separate orders or sending to ESVS – tax commons showed interest in this.) **X**
- Ensure tax exemption works properly in new customer search flow UI Improvement. **Y**
- Non-tax exempt customers showing up as Tax Exempt (Resolve – Not sure how this occurs **13 Users**) **X**

## HYPOTHESIS

- Search Tax ID info by email address as a secondary choice to phone #. (is this possible/would this yield better results data-wise? **X**)
- Test “disqualified” verbiage to see if its easily understandable.. **Y** (3 Users – I think this could be a lot more)
- Make it clear that you can scan cards using SPOS / No need to switch to POS/Register) (1 PASA – I think this could be a lot more, could do more exploratory research here).**X**

# Why Phone Number Search Wins Out for Our Current State

Although there are many benefits to using a direct Tax ID search, using a phone number may be the better choice for Order Up! for now.



- ✓ Duplicate records may not be an issue next year.
  - CGR sunset & SVOC replacement.
  - SVOC & Tax Common integration.
  - ProXtra State Tax ID field going away.
- ✓ Easy for customers to remember.
- ✓ Effort to switch OU! to a Tax ID search may change due to tax registration flow revamp.

# Future State – 2019

- Tax Exempt Registration will be getting completely revamped by Tax Commons.
- CGR will be phased out & SVOC will replace it. (Allows more records to show up by phone # search)
- ProXtra will not have a field for State Tax ID# (Will be consistent & use THD Tax ID)
- Financial Integrations Team (Tax Commons) will integrate with SVOC and there will be one single place a Tax ID is stored.
- Tool Rental has Tax Exemption on their road map for redesign
- Self Check Out will be launching an MVP for Tax Exemption using phone # search.
- Order Up! will keep phone # search until further notice.



# Next Steps

- Make minor updates to our UI (on/off btn, etc)
- Hold off until end of 2019 to work on Tax Exemption
- Align with other THD UX Designers to create a fluid tax exemption UX throughout THD

# Tax Exempt Cards Types



GSA Card – Tax Exempt (doesn't require THD registration)



Federal ID Card (Tax Exempt does not require THD Registration)

Please clip your card below and use for your store tax exempt purchases.



THD Registration Card (requires cut out – no lamination)



Veterans (discount card – not tax exempt)