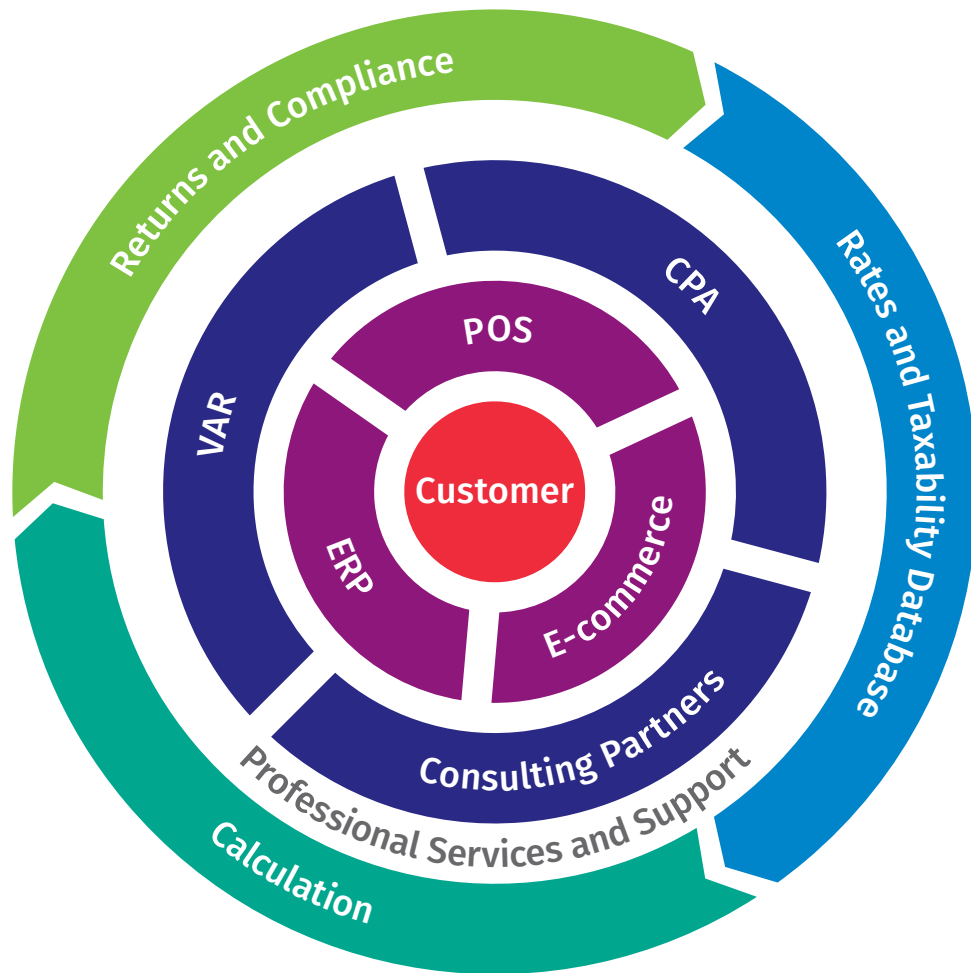




Conquer your
business
challenges

Tax & Accounting US

*Sales and Use Tax
Solutions from
Wolters Kluwer*



Wolters Kluwer has end-to-end sales and use tax solutions for every organization, regardless of size.

We know that as a link to customers, our business partners play a strategic and vital role in our success. With Wolters Kluwer's end-to-end indirect tax solutions, you'll be able to offer your clients automated sales and use tax compliance solutions from the industry leader.

With more than 10,000 taxing jurisdictions charging sales and use tax, staying in compliance is a significant pain point for all types of businesses. When you partner with Wolters Kluwer, you can be confident that you're offering the best indirect tax solutions available.

Our on-premise, cloud and native database solutions integrate easily with many accounting, ERP, e-commerce and point of sale (POS) systems to keep businesses in compliance with sales tax rules.

Sales and Use Tax Calculation Solutions

CCH® Sales Tax Office

Calculate sales tax instantly for multiple business entities and multiple ERP modules or systems. Reduce the time you spend monitoring and updating tax rate and taxability rules with CCH Sales Tax Office.

- **Nexus, Jurisdiction and Siting** — Avoid collecting unnecessary taxes by accurately establishing nexus and determining which taxes must be collected, with advanced geocoding and spatial analysis.
- **Flexible Calculation** — Precisely calculate taxes at the line item level, use multiple ship-from and ship-to combinations in a single invoice and handle complex tax calculation routines involving tax brackets, tax charts and tiered taxes.
- **Consumer Use Tax Processing** — Perform consumer use tax self-assessments and overpayment reviews by using your existing GL account numbers and/or purchase system enabling CCH Sales Tax Office to identify location, product and service classification and usage.
- **Customizable Features** — Customize the system taxability rules and tax rates with options such as creating custom groups and items, custom exemptions, SKU/group and item mapping overrides, taxability overrides, tax rate overrides, sourcing/siting overrides and custom taxes.
- **Simple Customer Exemption Management** — Fully integrated customer exemption management process includes expiration date tracking, group and item (or SKU) exception configuration and import/export capabilities.
- **End-of-Month Compliance** — Simplify the reconciliation process by running liability reports based on specified date ranges, audit reports for taxes and exemptions and output files for delivery to CCH® Sales Tax Returns Online.

CCH® Sales Tax SaaS CORE

CCH Sales Tax SaaS CORE offers a real-time, automated sales tax calculation service integrated with your financial or e-commerce system.

- **ERP and Shopping Cart Integration** — CCH Sales Tax SaaS CORE links your accounting system to the CCH Sales Tax SaaS Central Service resulting in correct sales tax calculations dropped directly into your invoicing or customer setup processes, so you avoid rate look-ups and manual errors.
- **Real-Time Address Validation and Jurisdiction Mapping** — CCH Sales Tax SaaS CORE validates each address as part of determining a correct jurisdiction and rate. The jurisdiction is made each time you set up a new customer or process an invoice and can also be done in batch mode.
- **Taxability Mapping** — Compliance management resources are minimized by our straightforward approach to mapping.
- **Nexus Management** — Add and delete the states and local jurisdictions that you want to collect sales tax — directly from the CCH Sales Tax SaaS Console.
- **Management Reporting** — Access reports in real time for supervision, tracking, treasury management and audit defense. Choose your summary or detail reports on transactions going back seven years — down to a particular line item on an invoice.

CCH® SureTax® Communications

See [Specialized Solutions Designed for Your Industry](#) (pages 6 and 7) to learn more.

Visit [SalesTax.com](https://www.salestax.com) to download free webinars, white papers, case studies and product brochures.

Sales and Use Tax Returns Preparation and Filing

CCH Sales Tax Returns Online

Save time and eliminate errors by automatically populating your sales and use tax forms, schedules and worksheets with tax information from your ERP system or CCH Sales Tax Office.

- **Zero Dollar Forms** — Based on locations or jurisdictional relationships, the data in the sales and use tax returns are aggregated to a zero dollar format template at the beginning of each filing period.
- **Address Validation** — Addresses are validated for your business locations and nexus records are created for simple sales tax calculations.
- **Comprehensive Form Packaging** — Sales tax return forms include worksheets and schedules that tie directly to the main form for calculations.
- **Easy Location Maintenance** — Easily batch import locations from the Web or use the single location entry option. Addresses are validated and nexus records are created.

CCH Sales Tax SaaS PLUS

CCH Sales Tax SaaS PLUS extends the essential functionality of CCH Sales Tax SaaS CORE, provides real-time, automated sales tax calculations, address validation, tax liability reporting and online management tools, with the addition of automated returns and filing in the cloud.

- **Automated Forms Generation** — Tax forms can be reviewed, adjusted, approved and generated in signature-ready form for every taxing authority in the U.S.
- **Automated Filing** — Control the preparation and approval of returns and let CCH Sales Tax SaaS create and file the returns, as well as remit payments on your behalf.
- **Completely Accessible History of Filed Returns** — CCH Sales Tax SaaS Console archives filed returns going back seven years and makes 13 months of previous returns available, as PDFs, for online review.
- **Stand-Alone Filing Option** — CCH Sales Tax SaaS PLUS can be used in conjunction with CCH Sales Tax SaaS CORE for seamless functionality from automated calculation through filing — with no need to prepare or transfer data — or as a stand-alone filing service where you provide the data and CCH Sales Tax SaaS auto-generates returns and handles filing and remittance.
- **Data Loading and Editing Tools** — When returns data is loaded from an external source, CCH Sales Tax SaaS builds in full transparency to the loaded data and any errors, along with options to edit, print, export or save data before approving the data for creation of returns.

Visit [SalesTax.com](https://www.sales-tax.com) to download free webinars, white papers, case studies and product brochures.

*Sales and Use Tax Returns Preparation and Filing Continued***CCH Sales Tax SaaS PRO** ♦

CCH Sales Tax SaaS PRO is a special edition designed for CPAs with tools to manage and perform sales tax compliance services for multiple clients.

- **Multiple-Client Management** — Enables tax professionals to manage returns preparation and filing for multiple clients. Repetitive, clerical work is outsourced, while oversight and management of your clients' data and compliance processes are streamlined so you can focus on adding value without tracking complex details.
- **Roles-Based Authorization** — Allows professionals at different levels to work seamlessly with each other and client staff during review and approval of returns.
- **Automated Forms Generation** — Tax forms can be reviewed, adjusted, approved and generated in signature-ready form.

CCH® Sales Tax Compliance Services ♦

Shift your company's labor-intensive sales and use tax filing burden to the experts at Wolters Kluwer and focus your time on more strategic tasks.

- Company setup and tax return configuration
- Tax return population and review
- Manual adjustments based on your company's particular needs
- Final review and Wolters Kluwer approval
- Fund notification and management
- Tax return filing and remittance
- Tax notice management



Specialized Solutions Designed for Your Industry

CCH SureTax Communications

Ensure the accuracy of your tax calculations, reduce risk, cut costs and save valuable time with CCH SureTax Communications, the most robust, real-time, accurate tax calculation solution designed specifically for the communications industry.

With CCH SureTax Communications, your tax calculations are driven by the most complete, up-to-date information available in the industry, including research for all telecom services and related tax rules covering the more than 10,000 jurisdictions in the United States, its territories and Canada.

- **Easy Setup** — Simplify your workday with a user-friendly interface and painless integration into billing systems, remittance systems, accounting systems, shopping carts and in-house reporting systems.
- **Ensure Accuracy and Reduce Risk** — Accurately bill and collect transaction taxes for telecommunications, maintain the proper tax rates and rules across all your service jurisdictions and properly apply those rules to all your offerings.
- **Rely on the Most Trusted Source** — CCH SureTax represents the industry standard for telecom data, with tax information so accurate that even the IRS uses it.
- **Generate Detailed Reports** — All data is auto-aggregated in remote data repositories, so you can easily create custom reports or access detailed standard reports that will support your monthly tax compliance, regulatory reporting, reconciliation, revenue analysis and audit defense.
- **Simplify Customer Exemption Management** — All results can be easily retrieved for in-house remittance systems or routed directly to our partner Tax Compliance Filing Service, if you choose.

CCH® SureTax® Energy

In today's environment, it takes more than an automated solution for successful tax management. A growing utility business needs a combination of "can do" and "know how." Only CCH SureTax Energy combines full workflow support and the industry's leading utility tax content.

- **Accurately Calculate Utility Taxes** — Designed to handle the complex sourcing and tax calculation rules that characterize the utilities industry with a powerful tax calculation engine fully integrated into your overall operations.
- **Easily Integrate into Your Technology Environment** — Provides a flexible interface with an easy-to-use API that can be integrated into ERP systems, billing or other internal systems. Businesses of all sizes can be up and running, quickly and easily.
- **Generate Detailed Reporting** — Easily access detailed standard reports that will support your monthly tax compliance, regulatory reporting, reconciliation, revenue analysis and audit defense.
- **Handle Your Complete Tax Management Cycle** — Customer exemptions, month-to-month rate and fee changes, retrieving historical data, and end-of-month compliance reports — all are features of the solution and become part of a simpler yet more robust workflow.



Specialized Solutions Designed for Your Industry Continued

Sales Tax Rates and Taxability Databases for Telecommunications, Utility and Restaurant Industries

Each database offers the latest specific taxability and tax rate information, applicable to any jurisdiction throughout the U.S., its territories and Canada.

- **Telecommunications** — Delivers the latest telecommunications rates and taxability for wireless, wireline, cable and VoIP services. It also reduces audit risk and conforms to the standard geocoding system for SSTP and MTSA, with the only telecommunication tax rate database that includes FIPS geocodes.
- **Utilities** — Provides the latest sales tax rates and taxability for the natural gas and electric utility industries. Includes products and services taxability determinations, consumer-oriented taxability and taxability by jurisdiction.
- **Restaurants** — Puts the unique rates and rules for the restaurant industry into a comprehensive database and lookup tool. Your tax department will easily and accurately update and monitor your POS system with monthly sales tax updates.

In addition to the industry-specific benefits, all rates and taxability databases allow you to:

- **Save Time During the Monthly Update Process** — Easily load the flat ASCII file (comma delimited or fixed length) into any operating environment with minimal programming.
- **Simplify Your Tax Rate Research Process** — Eliminate manual tracking and input.
- **Enjoy Faster, Easier Jurisdictional Determination, Even if a ZIP Code Crosses City Limits** — All industry-specific tax data is mapped using multiple location criteria: ZIP code, ZIP + 4, FIPS geocode and state, county and city name.



Tax Interchange for Retail

A dynamic end-to-end retail sales tax solution that helps tax departments achieve control, visibility and automation while relieving IT of tax related processes. Tax Interchange for Retail combines the industry's most comprehensive sales tax rates and taxability information from Wolters Kluwer with DuCharme, McMillen & Associates, Inc., (DMA) innovative POS tax management software.

Offered as both premise and cloud-based solution, it is designed to assist retailers in complying with tax regulation and industry changes.

- **Flexibility of Scale** — Tailored to the unique needs of any retailer, regardless of size.
- **Automated Updates** — Automates the time-consuming and error-prone task of keeping register systems up to date with current tax information.
- **Reporting and Compliance** — Provides a consolidated source for sales tax transaction reporting and compliance.
- **Simple Integration** — Supports off-the-shelf integrations to many leading POS systems.

Accurate Sales and Use Tax Calculations within Your ERP System

Microsoft®

Improve the accuracy of your sales and use tax calculations with CCH Sales Tax Office or CCH Sales Tax SaaS for Microsoft Dynamics® AX, GP and NAV — our solutions provide real-time address validation and tax calculation directly integrated to your Microsoft Dynamics® ERP.

CCH Sales Tax Office for Microsoft Dynamics® AX, GP and NAV

Whether you're automating sales and use tax calculations or integrating to your online shopping cart, CCH Sales Tax Office is flexible enough to fit your unique needs and help you with the complexity of sales and use tax decisions and accurate calculations.

- **Effortless Setup** — Configure the system from within your Microsoft Dynamics® solution, with options for business entities, business rules, nexus rules, users and functional permissions.
- **Rates and Taxability** — Stay up to date with trusted rates and taxability data, updated monthly.
- **Nexus, Jurisdiction and Sourcing** — Avoid collecting unnecessary taxes by accurately establishing nexus and determining which taxes must be collected, with state-of-the-art geocoding and spatial analysis based on ship-from, ship-to, order placement and order approval addresses.

- **Flexible Calculation** — Precisely calculate taxes at the line item level, use multiple ship-from and ship-to combinations in a single invoice, manage minimum and maximum tax rules and handle complex tax calculation routines involving tax brackets, tax charts and tiered taxes.
- **Consumer Use Tax Processing** — Perform consumer use tax self-assessments using your existing GL account numbers and/or purchase system codes to configure CCH Sales Tax Office to identify location, product and service classification and usage.
- **User-Friendly Interface** — Increase productivity with easy-to-use features that let you drill down into the details of a transaction, create and maintain custom taxes and overrides and originate tax-only credits.
- **Simple Exemption Management** — Save time on handling exemptions with 15 built-in exemption reason classifications or create custom exemption classes as required.
- **End-of-Month Compliance** — Increase the efficiency of your end-of-month process with liability reports based on specified date ranges, audit reports for taxes and exemptions and output files for delivery to CCH Sales Tax Returns Online.

Join our network of skilled implementation and customization experts

If you share our strong commitment to providing customers with the very best in indirect tax solutions — a total solution for sales and use tax content, calculation and compliance requirements, integrated with the most popular ERP systems, we want to hear from you.

CCH Sales Tax SaaS for Microsoft Dynamics®
A Software as a Service (SaaS) solution that replaces the tax calculation functionality of your Microsoft Dynamics® ERP solution, using reliable tax rates and taxability rules from Wolters Kluwer.

Accurate Sales and Use Tax Calculations within Your ERP System Continued

CCH Sales Tax SaaS for NetSuite®

CCH Sales Tax SaaS (CORE, PLUS or PRO) is an advanced tax calculation and returns solution that performs real-time sales and use tax calculations and automatic returns preparation and filing. It is tightly integrated with NetSuite® ERP solutions, providing a sophisticated method of automating your sales and use tax compliance.

CCH Sales Tax Office for SAP®

Improve the accuracy of your sales and use tax calculations and reduce your audit risk with CCH Sales Tax Office for SAP®. This advanced sales and use tax calculation system combines industry-leading tax rate and taxability content with highly accurate jurisdiction boundary information and sophisticated logic to produce accurate sales and use tax calculations — every time.

Address Validation

Address Validation API plug-in connects SAP® to a third party address validation service to validate and correct addresses automatically. Wolters Kluwer compiles commercial jurisdictional boundary information and combines it with our own proprietary data and processing to create unique digital maps for all the different overlapping subsets of tax jurisdictions and ZIP + 4 areas. When used in combination with a ZIP + 4 or a street address validation tool, this system provides an accurate foundation for both nexus and sourcing determination by the CCH Sales Tax Office application.

SAP® Integration

Communication between the SAP® ERP system and the CCH Sales Tax Office tax calculation engine is established using SAP® RFC (Remote Function Call) and SAP® tRFC (Transactional RFC) tax interface, which exchanges data between the SD, FI and MM modules of SAP®. The SAP® tax interface enables CCH Sales Tax Office to perform tax calculations that support functional tax and business requirements.

Get the most out of Wolters Kluwer indirect tax solutions.

Wolters Kluwer Sales and Use Tax Professional Services offers a variety of training and consulting services to help your clients get up to speed quickly using our indirect tax solutions.

- System implementation and configuration
- User training
- Sales tax education
- SKU mapping
- Process reviews and best practice recommendations
- Custom taxability research
- Nexus determination

Visit [SalesTax.com](https://www.wolterskluwer.com/sales-tax) to download free webinars, white papers, case studies and product brochures.

Rates and Taxability Databases Deliver Industry-Leading Research

CCH® Sales Tax Rates and Taxability Database

Reduce audit penalties and overpayments by keeping your ERP or point of sale (POS) system up to date with the thousands of sales and use tax rate changes occurring in local jurisdictions.

- Save time
- Simplify your research process
- Enjoy faster, easier jurisdictional determination, even if a ZIP code crosses city limits
- Reduce audit penalties and fines

See pages 6 and 7 for available databases: Telecommunications, Energy, Utilities, Food and Restaurant, Retail and more.

CCH® SmartCharts — Customer Exemption SmartChart

Quickly zero in on correct exemptions data and reduce the risk of under-collecting or over-collecting tax.

Find Answers You Need Through Fast, Simple Survey of More Than 17,000 Possible Exemption Scenarios Contained in Our Tax Matrix

Additionally, with just a few clicks you can verify the certification requirements of any tax-exempt customer exemption found in the chart for any location in the United States. You can even quickly summarize your search results in an easy-to-read, easy-to-use Excel® table based on your selection of exemption code(s), state(s) and/or tax type(s) variables.

Easy Setup to Simplify Your Workday

With a user friendly interface and painless integration into billing systems, remittance systems, accounting systems, shopping carts and in-house reporting systems.

New “Hotlinks” to Blank Exemption Certificates Make Certificate Management An Easy Mouse Click Away.

Customer Exemption SmartChart places data at your fingertips. Now you can combine both data and certificate management — with no extra work on your part — by leveraging the extensive tax research of Wolters Kluwer.

Achieve Clean and Systematic Billing by Downloading Up-To-Date Data.

In just three simple steps, you will find the exemption data you need:

- **Step 1** — Select the tax exemption category
- **Step 2** — Select the tax jurisdiction
- **Step 3** — Select the tax type

Simply download the data you need via the Internet. Then, export that data directly into Excel® worksheets, seamlessly integrating up to date information into your current workflow.

Visit SalesTax.com to download free webinars, white papers, case studies and product brochures.



Other Solutions

Income Tax Compliance

Choose from our integrated systems and tools that will simplify and automate workflow and document management, income tax compliance and fixed assets management. With more than 100 years of industry experience, take advantage of professional training and consulting sessions to help maximize your team's productivity. Choose the software used by the majority of accounting professionals, CCH® ProSystem fx® Tax.

CCH® IntelliConnect® continues to provide unprecedented access to Wolters Kluwer's world-class content, including superior research products that provide fast, accurate answers to your federal and state tax compliance questions. And now, with the addition of three new features, CCH® CodeConnect, CCH® IntelliConnect Browser Search and CCH® IntelliConnect Direct, accessing your CCH IntelliConnect content becomes a truly seamless part of your day-to-day workflow.

Free e-Newsletter

Intelligence for Taxation

Stay on top of current sales tax trends with a monthly roundup of state-by-state rate changes and legislative developments from industry experts. See sample at SalesTax.com/IFT and sign up today!

Evaluation Services

Wolters Kluwer customers can take advantage of Evaluation Services. Have our experts assess your content and data systems according to your evolving needs. Don't wait to be audited — assess your tax system today. An ounce of prevention can save a ton of problems!

Contact information:
Wolters Kluwer
2700 Lake Cook Road
Riverwoods, IL 60015
866-513-2677

Please visit SalesTax.com
for more information.