



Tax & Accounting

CCH[®] Sales Tax Office for Microsoft Dynamics[®] AX

Corporate

Reduce the time you spend monitoring and updating tax rate and taxability rules with CCH Sales Tax Office for Microsoft Dynamics[®] AX. This state-of-the-art tax calculation system combines industry-leading tax rate and taxability content with highly accurate jurisdiction boundary information and sophisticated logic capable of supporting the most complex sourcing and tax calculation rules.

Simplify Your Sales and Consumer Use Tax Process

Add enhanced sales tax functionality to Microsoft Dynamics[®] AX with this powerful plug-in. Integration with the Accounts Receivable and Accounts Payable modules helps you manage your sales tax compliance from both the selling and purchasing sides of your business. CCH Sales Tax Office provides:

- **Effortless Setup** — Configure the system from within Microsoft Dynamics[®] AX to meet your specific needs, with options for business entities, business rules, nexus rules, users and functional permissions.
- **Rates and Taxability** — Stay up-to-date with rate and taxability data from Wolters Kluwer, updated monthly with a simple download. Product SKUs are mapped to CCH Sales Tax Office groups and items, with customer products, rules and tax rate overrides all supported.
- **Nexus, Jurisdiction and Sourcing** — Determine necessary taxes by accurately establishing nexus with state-of-the-art geocoding and spatial analysis based on ship-from, ship-to, order placement and order approval addresses.

Gold
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- **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 and overpayment reviews by 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.
- **Commonsense 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** — Make your end-of-month reconciliation process more efficient 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.

When a user selects “Sales Tax” on a transaction form in A, the “Temporary Sales Tax Transactions” form is displayed with sales tax values populated from CCH Sales Tax Office. Clicking the “STO Tax Details” button brings up a form showing a breakdown of the taxes that were calculated per line item.

The screenshot displays two overlapping windows from Microsoft Dynamics AX. The background window is titled "Temporary sales tax transactions (1 - ceu) - Sales order: SO-100299, Cave Wholesales". It shows a table with columns for Sales tax code, Quantity, Amount, Adjusted amount, Percent, Calculated sales tax amount, and Actual sales tax amount. The total calculated sales tax amount is 280.00 and the total actual sales tax amount is also 280.00. A button labeled "STO Tax Details" is visible in the top right corner of this window.

The foreground window is titled "Sales Tax Office Tax Display (1 - ceu) - Sales order: SO-100299, Cave Wholesales". It contains the following information:

Orders

Invoice Id: SO-100299 Freight on board: Customer Id: 1103
 Provider type: EATING ESTABLISHMENT Customer/Usage type: RETAIL Tax amount: 280.00

Line Items

| SKU | Quantity | Amount |
|-------|----------|----------|
| 10005 | 1.00 | 4,000.00 |
| 5001 | 1.00 | 350.00 |
| #9 | 1.00 | 78.54 |

Ship-to address: 456 White Road Abbeville, GA 31001 USA
 Ship-from address: 1210 N Williamsburg Wichita, KS 67208 USA
 Delivery by: Exemption Code: Invoice date: 10/24/2012

Tax Details

| Authority name | Authority type | Tax name | Tax |
|----------------|----------------|-----------|----------|
| GEORGIA, S... | STATE | STATE ... | 40.00 |
| WILCOX, CO... | COUNTY | COUNT... | 0.00 |
| WILCOX, CO... | COUNTY | COUNT... | 4,000.00 |
| WILCOX, CO... | COUNTY | COUNT... | 0.00 |
| | | | 0.00 |
| | | | 0.00 |
| | | | 0.010000 |

Additional fields on the right side of the Tax Details section:

Fee: 0.00
 Taxable amount: 4,000.00
 Exempt amount: 0.00
 Taxable quantity: 0.00
 Exempt quantity: 0.00
 Tax rate: 0.010000

The Sales Tax Office tax authority type. Close

Accurately Calculate Use Tax

Consumer use tax associated with untaxed purchases often represents the greatest portion of a transactional audit assessment for many businesses. CCH Sales Tax Office for Microsoft Dynamics® AX uses integration with your Accounts Payable module to help prevent costly transactional audit penalties and interest as well as unnecessary overpayments.

CCH Sales Tax Office for Microsoft Dynamics® AX automatically:

1. Determines whether a purchased item is taxable, based on business rules that you set up and taxability rules from Wolters Kluwer.
2. Identifies whether or not sales or use tax was included on the invoice and paid to the vendor.
3. Generates the needed use tax calculation based on an accurate use tax rate from Wolters Kluwer.
4. Sends the needed use tax information to the Accounts Payable module.

Easily Automate Address Validation

Ensure reliable address information with the Address Validation API. The plug-in connects Microsoft Dynamics® AX to an address validation service to validate and correct addresses automatically or with the push of a button. Batch address validation is available in the Accounts Receivable, Accounts Payable, Inventory Management and CRM modules.

The CCH Sales Tax Office Address Validation API adds address validation functionality to the following Microsoft Dynamics® AX forms:

- Customers
- Vendors
- Business Relations
- Company Information
- Sales Order
- Sales Quotation

Seamless End-of-Month Compliance

CCH Sales Tax Returns Online, a sales and use tax solution, automatically populates your sales and use tax forms, schedules and worksheets with tax information from CCH Sales Tax Office. Review, edit, print, audit and even e-file these signature returns, and download Detail Filing Reports to streamline your check request process.

Professional Services

Partner with our highly knowledgeable and skilled Professional Services team to streamline your sales tax workflow. Reduce risk and manage complex sales tax operations and issues with beneficial features, including nexus studies, SKU mapping, rules and configurations, and custom taxability research. Form a partnership today with Wolters Kluwer and discover our personalized, hands-on services that will meet your individual needs and ensure you are achieving the highest levels of compliance.