



Tax & Accounting

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

Corporate

Reduce the time you spend monitoring and updating tax rate and taxability rules with CCH Sales Tax Office for Microsoft Dynamics[®] GP. 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

CCH Sales Tax Office provides:

- **Effortless Setup** — Configure the system from within Microsoft Dynamics[®] GP 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. 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** — Collect necessary taxes by accurately establishing nexus and applying data-driven sales tax sourcing rules.
- **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.

Gold
Microsoft Partner



- **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.
- **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** — Create seamless, end-to-end automation 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.

Microsoft Dynamics® GP Integration

Add enhanced sales tax functionality to the following Microsoft Dynamics® GP forms:

- Sales Transaction Entry
- Sales Item Detail Entry
- Sales Batch Entry
- Sales Series Posting
- Sales Multiple Orders to Invoices Transfer
- Sales Bulk Confirmation
- Sales Transaction Inquiry Zoom
- Sales Lists in the Navigation Pane 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 Web services support integration with your procurement functions to help prevent costly transactional audit penalties and interest, as well as unnecessary overpayments.

CCH Sales Tax Office for Microsoft Dynamics® GP automatically:

1. Determines whether a purchased item is taxable, based on predefined taxability rules from Wolters Kluwer.
2. Uses custom, user-defined business rules to determine taxability based on GL number, branch number, vendor number and more.
3. Identifies whether or not sales or use tax was included on the invoice and paid to the vendor.
4. Generates the needed use tax calculation based on an accurate use tax rate from Wolters Kluwer.

Easily Automated Address Validation

Ensure reliable address information with the Address Validation API. The plug-in connects Microsoft Dynamics® GP to an address validation service to validate and correct addresses automatically or with the push of a button.

Streamline Your Entire Sales Tax Process

CCH® Sales Tax SaaS is a convenient Software as a Service (SaaS) solution that performs real time, automated sales tax calculations and automatic returns preparation and filing. It's easily integrated into your ERP solution, and offers a clear, CPA-designed interface that makes defining and updating nexus, taxability, sourcing rules, exemptions, exceptions, shipping locations, SST volunteer status and other settings intuitive and comprehensive.

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 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.

Sales Transaction Entry: In a process that is seamless to the user, CCH Sales Tax Office provides the calculation for the Tax Amount field in the GP general transaction form.

