



## Tax & Accounting

# CCH<sup>®</sup> Sales Tax Office for Microsoft Dynamics<sup>®</sup> Retail

Corporate

CCH Sales Tax Office for Microsoft Dynamics<sup>®</sup> Retail provides multi-channel retailers accurate, real-time sales tax calculation for their daily point-of-sale (POS) transactions. This innovative plug-in enhances the retailer's system by seamlessly connecting it to the state-of-the-art tax calculation functionality and the industry-leading tax rate and taxability content provided by CCH Sales Tax Office.

### **Simplify Your Sales and Consumer Use Tax Process**

Add enhanced sales tax functionality to Microsoft Dynamics<sup>®</sup> Retail with this powerful plug-in. CCH Sales Tax Office provides:

- **Effortless Setup** — Configure the system from within Microsoft Dynamics<sup>®</sup> Retail 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 standard 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.
- **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.
- **Common-sense 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®.

### The Microsoft Dynamics® Retail Plug-in Streamlines Essential Functions

Integration of CCH Sales Tax Office into your Microsoft Dynamics® ERP system delivers sophisticated functionality in support of exemplary sales tax management and compliance. The tax manager with responsibility for ensuring compliance, the IT specialist who keeps the online system operational, and the end users in the store will all experience simplicity of use and dependability of operations.

- **Easy Interface** — The unobtrusive plug-in fits right into the end user's existing workflow.
- **Uninterrupted Calculations** — In the event of a network disruption, an internal mechanism enables essential rates and taxability information to continue to be provided at the local point of sale — ensuring uninterrupted transactions. Following an

incident, the local information is sent back to the headquarter Microsoft Dynamics® Retail system for recalculation and inclusion with corporate numbers.

- **User-based Security** — Specified user roles restrict admin rights to the CCH Sales Tax Office for Retail configuration settings. From cashiers working directly at the POS, to tax managers needing more detailed access, your Microsoft Dynamics® user roles ensure that access to modules is limited to authorized personnel.
- **Confident Implementation** — The application design assures a smooth implementation, backed by an experienced Wolters Kluwer team.
- **Available Expertise** — In addition to the standard plug-in implementation, we provide customized services to help companies address their unique sales tax requirements.

### Innovative Mechanism Ensures Uninterrupted Sales Tax Calculations

A significant performance-enhancing feature of the Retail plug-in is the ability to maintain consistent operations at the point of sale, regardless of connectivity status with the HQ system.

- In the event of system downtime, a direct connection from CCH Sales Tax Office to the local POS systems is maintained, allowing rate and taxability information to continually flow to local POS systems, and ensuring uninterrupted operations until the HQ connection is re-established.
- During the HQ system downtime, all transactions are cached and then synced up once connection is restored. There's no loss of data and the POS function remains fully operational.
- Following an incident, the local information is sent back to the HQ Microsoft Dynamics® system for inclusion with corporate numbers.
- All orders are recalculated and any rate variances are flagged for review through a

new custom Microsoft Dynamics® report that displays all point of sale transactions that were reconciled to CCH Sales Tax Office and required adjustment.

- The CCH Sales Tax Office Plug-in for Microsoft Dynamics® Retail currently works on systems that support Microsoft Dynamics® AX 2012 R2 CU7.

### Seamless End-of-Month Compliance

**CCH Sales Tax Returns Online** — A companion sales and use tax solution from Wolters Kluwer, CCH Sales Tax Returns Online automatically populates your sales and use tax forms, schedules and worksheets with tax information received 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.

