

CCH[®] SureTax[®]

CCH SureTax for Microsoft Dynamics 365 Field Service

User Guide

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1. INTRODUCTION AND PRE-REQUISITES

A. Welcome to CCH SureTax for Microsoft Dynamics 365 Field Service

CCH SureTax for Dynamics 365 Field Service helps you accurately calculate sales tax and to validate addresses.

- CCH SureTax package is composed of the following:
 - CCH SureTax Base solution
 - This contains the CCH SureTax Power App
 - CCH SureTax Configurations are performed here
 - CCH SureTax Field Service solution
- Supported industries: General Sales
- Supported version:
 - Microsoft Dynamics 365 Field Service version 8.8.x.x (online)
- Supported countries: United States and Canada
- Supported Dynamics 365 Field Service forms and workflows for tax calculation:
 - Opportunities
 - Quotes
 - Orders
 - Invoices
 - Work Orders
 - Get Products from Opportunities (Quotes, Orders, Invoices)

B. CCH SureTax Pre-requisites and Configuration

For this add-on to function correctly, you must have the following:

- Valid client number and validation key for CCH SureTax V07 (Calculation) and CCH SureTax Data API enabled for your account.
 - Endpoint URLs for CCH SureTax V07 and Data API.
 - The URL for CCH SureTax will typically look like the following:
 - <https://<hostname>/Services/V07/SureTax.asmx>
 - The URL for CCH SureTax Data API will typically look like the following:
 - <https://<hostname>/v01/>
 - Your CCH SureTax Client Number and Validation key are typically identical for both of the above.
 - Please contact your CCH SureTax representative for any questions.
- From the CCH SureTax portal (you can get your login and URL from your CCH SureTax representative), you must do the following:
 - Nexus Configuration
 - SKU/Product mapping setup
 - SKU named 'Freight' must be setup.
 - At a minimum, we recommend that you create a SKU mapping to act as your default SKU mapping, which allows you to use unmapped SKUs:
 - E.g.
 - SKU / Product Value = -1
 - Customer Type = 99 - Default
 - Regulatory Code = 99 - Default
 - Transaction Type Code can be set to the default product you want to use (for example, 990101 - General Sales)

For this add-on to function correctly, you must have the following:

- Valid client number and validation key for CCH® SureAddress™ V02 API enabled for your account.

- Endpoint URLs for CCH® SureAddress™ V02.
 - The URL for CCH® SureAddress™ will typically look like the following:
 - <https://<hostname>/v02/SureAddress.asmx>
- Please contact your CCH® SureAddress™ representative for any questions.

2. INSTALLATION AND CONFIGURATION

A. Installing CCH SureTax for Dynamics 365 Field Service

The following section includes instructions for installing the following CCH SureTax for Microsoft Dynamics 365 Field Service.

1. Unzip the package file *CCH_SureTax_for_Dynamics_365_FieldService_Package_AppSource.zip*
2. Unzip package.zip
3. There should be 2 solutions
 - a. *package/PkgFolder/CCHSureTaxBase_x_x_xxxxx_xxxxxxxx_managed.zip*
 - b. *package/PkgFolder/CCHSureTaxFieldService_x_x_xx_xxxxxxxx_managed.zip*
4. CCH SureTax solutions can be installed directly through Microsoft Power Apps
 - a. Navigate to <https://make.powerapps.com>
 - b. Select the desired environment at the top right corner.
 - c. Select Solutions at the bottom left corner.
 - d. Import each solution in the order shown below
 - Import CCH® SureTax Base Solution zip file with the name *CCHSureTaxBase_x_x_xxxxx_xxxxxxxx_managed.zip*
 - Import CCH® SureTax Sales Solution zip file with the name *CCHSureTaxFieldService_x_x_xx_xxxxxxxx_managed.zip*
 - Click on Publish all Customizations.
5. CCH SureTax solutions can be installed directly through your environment
 - a. Navigate to your D365 environment (ex <https://sample.crm.dynamics.com/>)
 - b. Select Settings at top right corner => Advanced Settings => Customization => Solutions
 - c. Follow Step 3d from above.
6. CCH SureTax Package can be installed using the Microsoft CRM tool PackageDeployment.
 - a. Unzip the package.zip from
 - b. Copy over the following files from package.zip to the root of your PackageDeployment folder
 - PkgFolder
 - CCH.SureTax.CE.FieldService.PackagingDeployment.dll
 - c. Run the PackageDeployer.exe
 - d. Select the environment to be deployed.
 - e. Follow all steps until successfully deployed.

B. User Security Tasks & Security Roles

Security roles allow you to assign user permissions for various parts of this add-on. Assign roles to your users to ensure they have access.

- SureTax Power User
 - Have permissions to edit and view all CCH SureTax fields on supported forms
- SureTax Basic User
 - Have permissions to view CCH SureTax fields on supported forms.
 - Edit permissions are allowed for header/line item CCH SureTax settings for Opportunities, Quotes, Orders, Work Orders, and Invoices.
- NOTE: CCH SureTax settings for Products, Accounts, and Contacts can be edited if user has access to these Entities.

C. CCH SureTax Basic Config

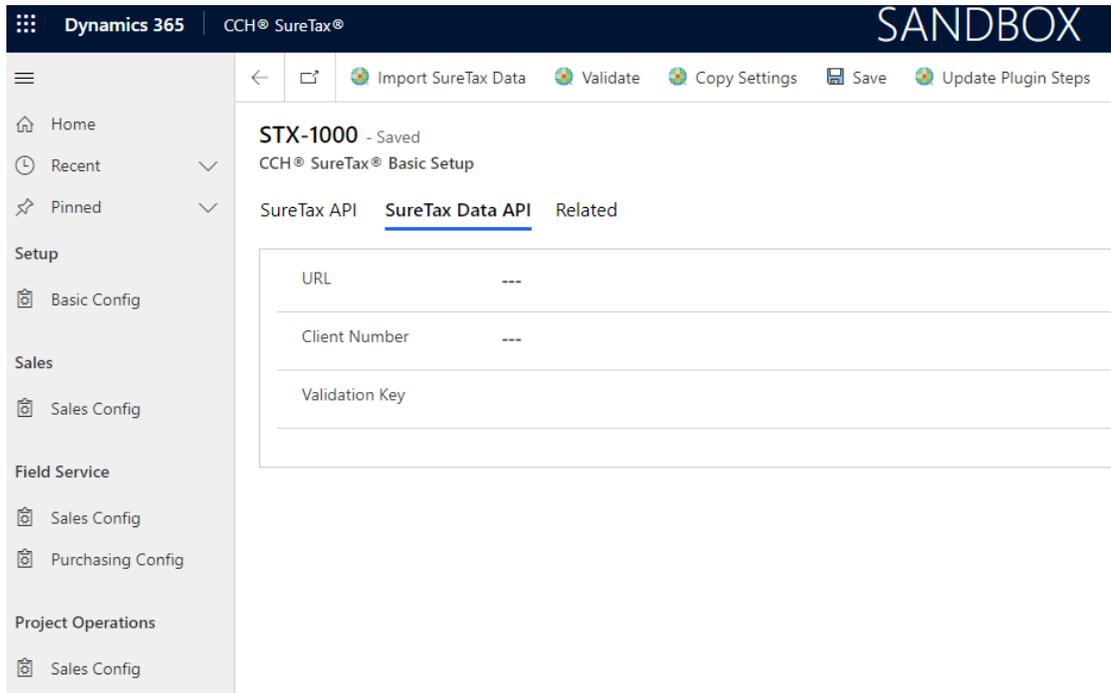
This section configures the connection settings required for tax calculation and data setup. This data is stored at the Dynamics 365 Business Unit (Team/User) level.

To configure settings, do the following:

- Open CCH SureTax Power App -> Click on Basic Config under Setup
- SureTax API:
 - Here you configure the CCH SureTax API values for calculation. All fields are required, except for CCH SureTax Business Unit (note that this is different from Dynamics 365 business unit).

STX-1000 CCH SureTax Basic Setup	
SureTax API SureTax Data API Related	
Enable SureTax	Yes
Disable Auto Calc	Yes
CCH SureTax Business Unit	---
URL	---
Client Number	---
Validation Key	

- Enable SureTax - If No, then this integration will be disabled.
- Disable Auto Calc -
 - If set to 'Yes', the calculation on all taxable form will be triggered only when 'Calculate Tax' button on each of the forms is used.
 - If set to 'No', the integration will calculate tax on all taxable forms on each tax relevant update of the form in context.
- After values are filled in, continue to SureTax Data API tab.
- SureTax Data API:
 - Here you configure the values needed to connect to CCH SureTax Data API. All fields are required.

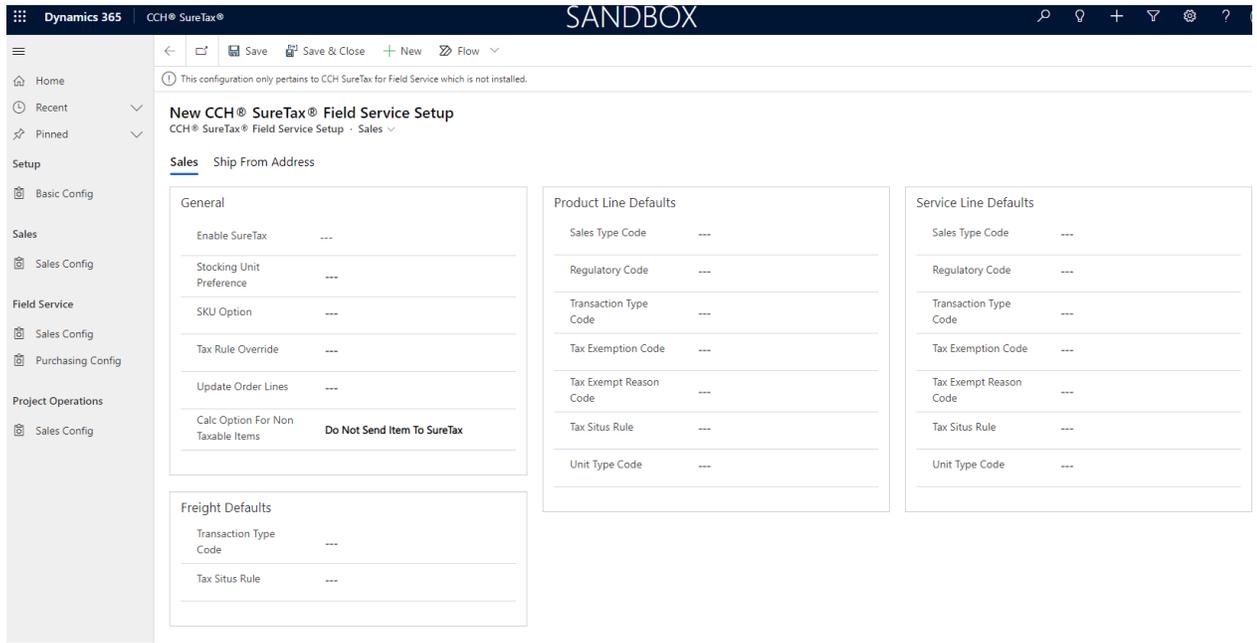


-
- After all fields are entered, click Save
- Click on the button ‘Import SureTax Data’ to setup CCH SureTax data on your system.
 - This uses connection data stored for SureTax Data API to import tax data into relevant CCH SureTax entities.
 - Imported data from here is stored at the Organization level.
 - Note that feature checks to see if used SureTax Entities used to import data into have any failed Keys during creation (see Known issues). If any Failed keys are found, jobs will be made to activate keys for Entities used for SureTax Data. User will have to wait for the jobs to complete before attempting to Import SureTax Data again.
- **‘Validate’ button** - Can be used to verify that your credentials are valid.
- **‘Copy Settings’ button** - If you have more than 1 Dynamics 365 business unit, you can use ‘Copy Settings’ button to copy CCH SureTax settings (Basic Config and Sales Config under Field Service) from another business unit. It is recommended to use this after 1 Dynamics 365 business unit has been setup completely with CCH SureTax settings as all settings will be copied.
- **‘Update Plugin Steps’** - Can be used to update plugin steps if more than one of our solution is installed
 - If ‘CCH SureTax Sales’ solution is installed and ‘CCH SureTax Field Service’ solution is installed after it, use this button to make sure all required filtering and image attributes are in the respective plugin.
 - Even if the solutions installation order is reversed, use the button to make sure all the required filtering and image attributes are in the respective plugin.

D. Configuring CCH SureTax Field Service Setup Sales Config

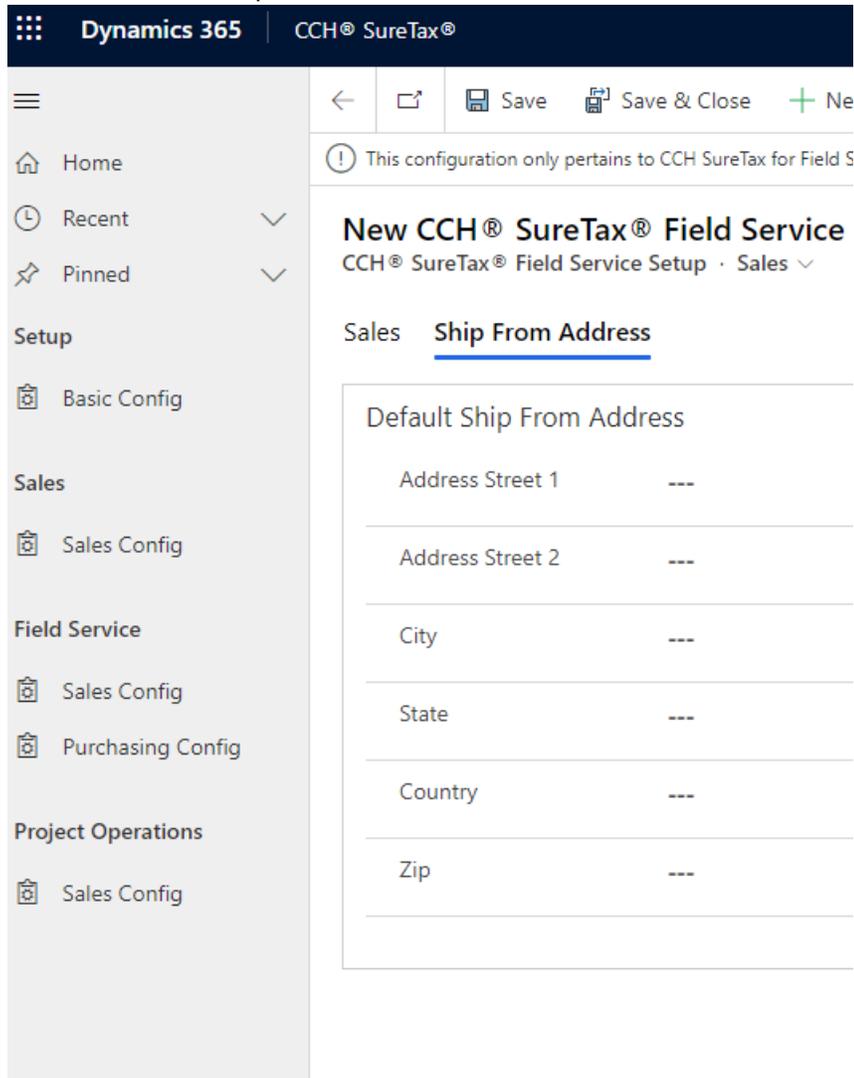
The Field Service > CCH SureTax Sales Config form contains settings that can be configured at the Dynamics 365 business unit level. To configure settings, do the following:

1. Open CCH SureTax Power App -> Field Service > Click on Sales Config



- a.
 2. **Enable SureTax** - You can select specific forms to enable tax calculation for.
 3. **Update Order Lines** selection, select **Yes/No**. This determines when to update transaction lines for an order/invoice when a header level setting is updated.
 4. **Stocking Unit Preference**:
 - a. **Transaction Type Code**. You can select an option to indicate whether the Stocking Keeping Unit or Transaction type code field will be sent as the SKU to CCH SureTax:
 - i. Transaction Type Code can be configured for Products and highly recommended if this option is selected, otherwise, the Default will be used.
 - ii. If SKU is selected, you must map your SKUs in CCH SureTax (via the CCH SureTax portal).
 - b. **SKU**. You can select an option to indicate whether 'Product ID' for Product or Product Family will be sent as the SKU to CCH SureTax. For Write-In Products, Write-In Product (User entered value) will be sent as the SKU to CCH SureTax.
 - c. **REMINDER**: If SKU option is selected, you must create SKU mappings for "Freight" CCH SureTax portal, because this is used for CCH SureTax calculation.
 5. **SKU Option** - Product or Product Family can be selected
 6. **Tax Rule Override** - Default Tax Logic is recommended, but you can select other options based on your business needs (This sets 'RuleOverride' value sent to CCH SureTax during calculation).
 7. **Calc Option for Non-Taxable items** -
 - a. **Do Not Send Item to SureTax**
 - i. On each taxable transaction form, we do not send the line item to SureTax for tax calculation if the item is nontaxable.
 - b. **Send Item as Full Exempt**
 - i. On each taxable transaction form, we send the item to SureTax for tax calculation as fully exempt if the item is nontaxable.
- * Opportunity Products do not have taxability option.
- * Quotes, Sales Orders, and Work Order service lines do have taxability options - So when a user creates an invoice from a Sales Order/Work Order, we use the original order's line item's taxability for invoice tax calculation based on the above option.
8. **Product Line Defaults and Service Line Defaults** section contains all defaults used for tax calculation based on the line type
 - a. **Tax Exemption Code**. Example: 00 - No Exceptions.
 - b. **Regulatory Code**. Example: 99 (DEFAULT).
 - c. **Sales Type Code**. Example: T (Retail).

- d. **Transaction Type Code.** Select the most frequently used Transaction Type Code for your business. Example: "990101 - General Sales."
 - e. **Unit type Code.** Example: Select **99** for General Sales.
 - f. **Tax Situs Rule.** Example: Select **22** for General Sales.
 - g. **Tax Exempt Reason Code.**
9. Freight Defaults:
- a. **Tax Situs Rule** - Only used for freight. Example: Select **22** for General Sales.
 - b. **Transaction Type Code** - Only used for freight if Stocking Unit preference is set to Transaction Type Code.
10. Click **Save** to save the options on the CCH SureTax Field Service Config form.
11. Ship-From Address tab:
- a. Enter the default Ship From Address used for tax calculation.



- b.
 - i. Please enter all values, only Address Street 2 is not needed.
 - 1. Country is expected to be 2 digits abbreviation (e.g. US, CA, etc.)
- c. Click **Save**

E. Configuring CCH SureTax SKU Preferences

SKU preferences for the Field Service module are contained in the CCH SureTax Field Service Setup - Sales Config as its own tab. SKU Preferences is used to customized what the user want to send as SKU for each line item. User can select the SKU for all product lines detail under Opportunities, Quotes, Sales Orders, Invoices, Work Orders, and Purchase Orders.

The screenshot displays the Dynamics 365 CCH SureTax interface. The top navigation bar shows 'Dynamics 365' and 'CCH SureTax'. The main content area is titled 'STX-1000 - Saved' and 'CCH SureTax Field Service Setup - Sales'. Below this, there are tabs for 'Sales', 'Ship From Address', 'SKU Preferences' (which is selected), and 'Related'. The 'Opportunities' section contains a table with the following columns: 'Transaction Type', 'Product Lines', 'Service Lines', and 'Stocking Unit Preference'. The 'Stocking Unit Preference' column is currently set to 'Transaction Type Code'. Below the table, it indicates '1 - 2 of 2' items. The 'Quotes' section also contains a table with the same columns and 'Transaction Type Code' selected for 'Stocking Unit Preference'.

-
- The Default Stocking Unit Preference is *Transaction Type Code* option which means that for all line items, the associating Transaction Type Code will be sent as the SKU.
- User can change the Stocking Unit Preference to *SKU* which will opens the SKU Preference Table selection.
- User can then select the column for the table they selected - The value from that column field will be used as the SKU for all product lines for the Transaction Form selected.

F. Configuring CCH SureTax Field Service Setup Purchase Config

The Field Service > CCH SureTax Purchase Config form contains settings that can be configured at the Dynamics 365 business unit level. To configure settings, do the following:

12. Open CCH SureTax Power App -> Field Service > Click on Purchasing Config

General

Enable SureTax	---
Stocking Unit Preference	---
SKU Option	---
Update Order Lines	---

Shipping Defaults

Transaction Type Code	---
-----------------------	-----

Line Item Defaults

Sales Type Code	---
Regulatory Code	---
Transaction Type Code	---
Tax Exemption Code	---
Tax Exempt Reason Code	---
Tax Situs Rule	---
Unit Type Code	---

a.

13. Enable SureTax - You can select specific forms to enable tax calculation for.
14. Update Order Lines - Determines if each transaction line-item level settings will be updated when a header level setting is updated.
15. Stocking Unit Preference:
 - a. **Transaction Type Code.** You can select an option to indicate whether the Stocking Keeping Unit or Transaction type code field will be sent as the SKU to CCH SureTax:
 - i. Transaction Type Code can be configured for Products and highly recommended if this option is selected, otherwise, the Default will be used.
 - ii. If SKU is selected, you must map your SKUs in CCH SureTax (via the CCH SureTax portal).
 - b. **SKU.** You can select an option to indicate whether 'Product ID' for Product or Product Family will be sent as the SKU to CCH SureTax. For Write-In Products, Write-In Product (User entered value) will be sent as the SKU to CCH SureTax.
 - c. **REMINDER:** If SKU option is selected, you must create SKU mappings for "Freight" CCH SureTax portal, because this is used for CCH SureTax calculation.
16. **SKU Option** - Product or Product Family can be selected
17. **Tax Rule Override** - Default Tax Logic is recommended, but you can select other options based on your business needs (This sets 'RuleOverride' value sent to CCH Sure Tax during calculation).
18. Line Defaults and Service Line Defaults section contains all defaults used for tax calculation based on the line type
 - a. **Tax Exemption Code.** Example: 00 - No Exceptions.
 - b. **Regulatory Code.** Example: 99 (DEFAULT).
 - c. **Sales Type Code.** Example: T (Retail).
 - d. **Transaction Type Code.** Select the most frequently used Transaction Type Code for your business. Example: "990101 - General Sales."
 - e. **Unit type Code.** Example: Select **99** for General Sales.
 - f. **Tax Situs Rule.** Example: Select **22** for General Sales.
 - g. **Tax Exempt Reason Code.**
19. Shipping Defaults:
 - a. **Transaction Type Code** - Only used for freight if Stocking Unit preference is set to Transaction Type Code.
20. Click **Save** to save the options on the CCH SureTax Field Service Purchase Config form.

G. Configuring CCH SureTax Settings for Products

Optional settings that override default values used for tax calculation can be configured for Products.

To configure settings, do the following:

- Field Service -> Change area to Settings -> Click on Products -> Create new or edit existing product.
- Click on CCH SureTax Settings tab

The screenshot shows the Dynamics 365 Field Service interface. The top navigation bar includes 'Dynamics 365' and 'Field Service'. The main header area displays 'Product: TShirt - Saved' and 'Product'. Below this, there are several tabs: 'Product Details', 'Product Properties', 'CCH® SureTax® Settings' (which is selected), 'Additional Details', 'Notes', 'Field Service', and 'Related'. The 'CCH SureTax Settings' tab contains two rows of settings: 'Tax Situs Rule' and 'Transaction Type Code', both with a '---' value. On the left side, there is a navigation pane with a 'General' section containing 'Field Service Setti...', 'Users', 'Territories', 'Org Units', 'Asset Categories', 'Postal Codes', 'Tax Codes', 'Payment Terms', and 'Products'.

- From this form, you can set:
 - Tax Situs Rule
 - Transaction Type Code

H. Configuring CCH SureTax Settings for Customers (Accounts and Contacts)

Optional settings that override default values used for tax calculation can be configured for Customers (Accounts and Contacts).

To configure settings, do the following:

- Field Service -> Change area to Service -> Click on Accounts or Contacts -> Create new or edit existing.
- Click on CCH SureTax Settings tab

Dynamics 365 | Field Service

← Save Save & Close + New Geo Code Flo

New Account

Summary Details CCH® SureTax® Settings Scheduling Servi

Enable SureTax	---
Tax Exemption Code	---
Sales Type Code	---
Tax Exempt Reason Code	---

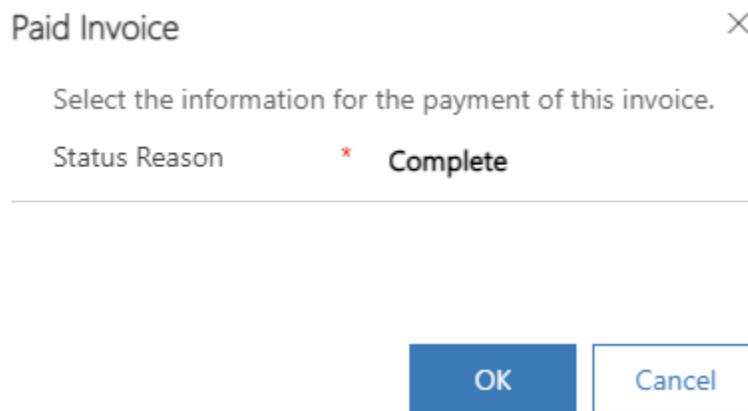
Navigation: Home, Recent, Pinned, My Work (Get Started, Dashboards), Scheduling (Work Orders, Schedule Board, Bookings, Resource Require..., Requirement Gro..., Time Off Requests, Time Entries), Customers (Accounts, Contacts), Service Delivery (Cases, Agreements), Service

- From this form, you can set:
 - Enable SureTax
 - Tax Exemption Code
 - Sales Type Code
 - Tax Exempt Reason Code

3. USING CCH SURETAX FOR DYNAMICS 365 Field Service

A. Tax Calculation

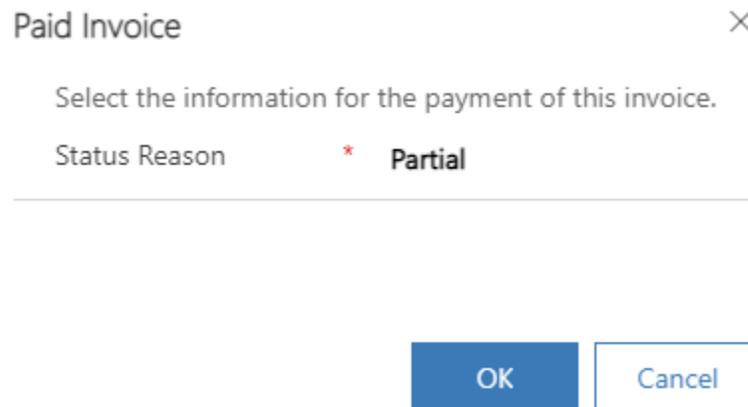
- Tax is calculated on supported forms if CCH SureTax is enabled. Tax calculation with CCH SureTax is triggered at the following:
 - On save at the header level.
 - Product (Line Item) is added/edited.
 - Only changes to tax relevant fields are used to determine when tax calculation is triggered.
- Features specific to Invoices:
 - Invoice Paid - is supported by posting to CCH SureTax
 - Note: CCH SureTax will post the whole invoice regardless of Status Reason being Complete or Partial, as partial posting not supported correctly by Dynamics 365 Sales.



Paid Invoice ×

Select the information for the payment of this invoice.

Status Reason * **Complete**



Paid Invoice ×

Select the information for the payment of this invoice.

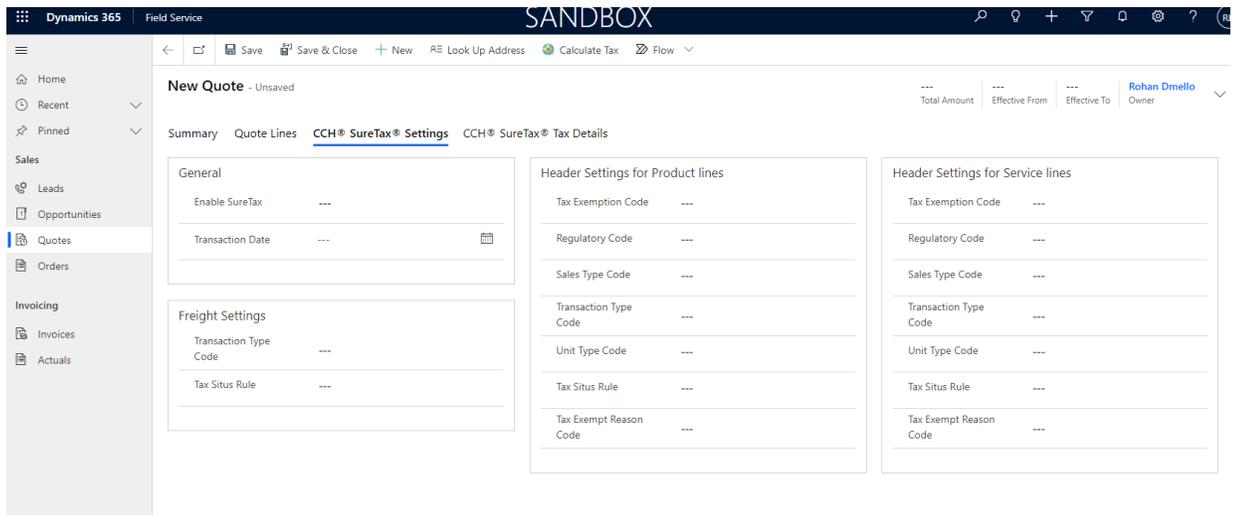
Status Reason * **Partial**

- Cancel Invoice - will cancel the posted invoice in CCH SureTax

B. Configuring CCH SureTax Header Settings

The CCH SureTax Settings form is available at the header level for all supported forms, is used to modify settings used for CCH SureTax calculation. Initial values are set based on default configured in CCH SureTax Field Service Config, but CCH SureTax Settings set on Products and Customers take precedence (used if they are set).

- Open supported form -> Fill in tax relevant details -> Save
- Click on the CCH SureTax Settings tab to view/edit CCH SureTax Settings.



- You can modify the following fields:

- a. **Date Settings:**

- i. **Transaction Date** - Date used for tax calculation date and initialized to when associated entity (e.g. Opportunity, Quote, Order, Invoice) is created.
- ii. **Compliance Date** - Available only for Invoices. Date used for Compliance Year/Month for tax calculation. If blank, the posting date of invoice used, otherwise, the entered date is used.

Summary Quote Lines CCH® SureTax® Settings CCH® SureT

General

Enable SureTax ---

Transaction Date ---

1.

- b. **Header Settings:**

- i. **Enable SureTax**

- c. **Header Settings for Product Lines and Service Lines:**

- i. **Tax Exemption Code**
- ii. **Regulatory Code**
- iii. **Sales Type Code**
- iv. **Transaction Type Code**. Used only if the Stock Unit Option is set to Transaction Type Code.
- v. **Unit Type Code**. Select the default code (e.g. 99 for General Sales).
- vi. **Tax Situs Rule**. Select the default Tax Situs Rule (e.g. 22 for General Sales).
- vii. **Tax Exempt Reason Code**

- d. **Freight Settings:**

- i. **Transaction Type Code**. Used only if the Stock Unit Option is set to Transaction Type Code.
- ii. **Tax Situs Rule**. Select the default Tax Situs Rule (e.g. 22 for General Sales).

C. Configuring CCH SureTax Line Settings

Line settings are similar to header settings but can be set for each line items (Products and Services).

- Open supported form -> Fill in tax relevant details -> Save
- Add Product (line item) and fill in details (or open existing).

- While viewing the line item, you can click on the CCH SureTax Settings tab to view/edit CCH SureTax Settings.

Invoice Product

General Delivery Address Product Properties CCH® SureTax® Settings

Enable SureTax	---
Tax Exemption Code	---
Regulatory Code	---
Sales Type Code	---
Transaction Type Code	---
Unit Type Code	---
Tax Situs Rule	---
Tax Exempt Reason Code	---

-
- You can modify the following fields:
 - **Line Settings:**
 - **Enable SureTax**
 - **Tax Exemption Code**
 - **Regulatory Code**
 - **Sales Type Code**
 - **Transaction Type Code.** Used only if the Stock Unit Option is set to Transaction Type Code.
 - **Unit Type Code.** Select the default code (e.g. 99 for General Sales).
 - **Tax Situs Rule.** Select the default Tax Situs Rule (e.g. 22 for General Sales).
 - **Tax Exempt Reason Code**

D. Ship-To and Ship-From addresses used for CCH SureTax Calculation

Sales tax calculation requires a ship-to and ship-from address to accurately calculate sales/use tax. The CCH SureTax add-on uses the following on each supported form:

- Ship-From Address:
 - 'Default Ship-From Address' set in CCH SureTax Field Service Config.
- Ship-To Address:

- The address entered at each supported form.
- Purchase Order forms
 - Ship-From Address:
 - Vendor Address
 - Ship-To Address
 - Whichever option is selected in “ShipTo” field of Purchase order.
 - Based on that field, an address will be populated in the Address Tab of Purchase Order.

E. Viewing CCH SureTax Tax Details

Once tax is calculated, you can view details on supported forms (at header level), by view CCH SureTax Tax Details tab.

- Open any supported form at header level.
- Ensure you have calculated tax.
- Click on CCH SureTax Tax Details tab.
- Here you can view detailed tax data.

Invoice · Invoice ▾ Total Amount | Status | Status Reason | Owner

Summary Details CCH® SureTax® Settings **CCH® SureTax® Tax Details** Related

Header Details

Total Tax	\$33.975	Header Message	Success	Return File Code	Q
Transaction Id	841416612	Customer Number	Test_Account	Invoice Number	INV-01018-K6D3L4
Transaction Date	12/6/2021	Compliance Date	---	Invoice Status	---

Line and Tax Details Refresh Flow ▾ Run Report ▾ ⋮

Group By: (no grouping) ▾

SKU ▾	Line Number ▾	Amount ▾	Total Line Tax ▾	Quantity ▾	Transaction typ... ▾	Regulatory... ▾	Sales Typ... ▾	Tax Exem... ▾	Tax Exemp... ▾	Item Message ▾
> TShirt	0	\$300.000	\$18.000	3.00	990101	70	T	12	04	---
> Test_Product	1	\$50.000	\$1.125	1.00	990101	70	T	12	02	---
> Product1	2	\$100.000	\$8.250	1.00	990101	70	T	12	00	---
> Freight	freight	\$80.000	\$6.600	1.00	990101	70	T	12	00	---

⏪ ⏩ Page 1

- Note that you can expand the Line item to quickly see more information (see below screenshot)

Line and Tax Details

Assign CCH® SureTax... Share Email a Link

Group By: (no grouping)

SKU	Line Number	Amount	Total Line Tax	Quantity	Transaction typ...	Regulatory ...	Sales Typ...	Tax Exem...	Tax Exemp...	Item Message
▼ TShirt	0	\$300.000	\$18.000	3.00	990101	70	T	12	04	---
Revenue		Tax Amount	Tax Rate		Tax Type Desc		Tax Authority Name		Tax Type Code	
		\$300.000	\$18.000		0.0600	STATE SALES TAX	CALIFORNIA, STATE OF		10101	→
		\$300.000	\$0.000		0.0025	COUNTY SALES TAX	KERN, COUNTY OF		20201	
		\$300.000	\$0.000		0.0100	CITY SALES TAX	BAKERSFIELD, CITY OF		30401	
		\$300.000	\$0.000		0.0100	LOCAL SALES TAX	KERN, COUNTY OF		20501	
Page 1										
> Test_Product	1	\$50.000	\$1.125	1.00	990101	70	T	12	02	---
> Product1	2	\$100.000	\$8.250	1.00	990101	70	T	12	00	---
> Freight	freight	\$80.000	\$6.600	1.00	990101	70	T	12	00	---
Page 1										

-
- To view more details for line items, click on the line item and the ‘->’ icon on the right.

STX-01355 - Saved
CCH® SureTax® Line Detail

General CCH® SureTax® Tax Details

Line Number	0
Line Amount	\$300.000
Total Line Tax	\$18.000
Item Quantity	3.00
SKU	TShirt
Item Message	---
Regulatory Code	70
Sales Type Code	T
Tax Exemption Code	04
Tax Exempt Reason Code	12
Tax Situs Rule	22
Transaction type Code	990101

- While viewing the line item tax details, you can click on CCH SureTax Tax Details tab to view tax jurisdiction level tax data.

CCH® SureTax® Tax Details

Refresh [⌵] Flow [⌵] Run Report [⌵] ⋮

Search this view 🔍

Revenue	Tax Amount	Tax Rate	Tax Type Desc	Tax Authority Name	Tax Type Code
\$300,000	\$18,000	0.0600	STATE SALES TAX	CALIFORNIA, STATE OF	10101
\$300,000	\$0,000	0.0025	COUNTY SALES TAX	KERN, COUNTY OF	20201
\$300,000	\$0,000	0.0100	CITY SALES TAX	BAKERSFIELD, CITY OF	30401
\$300,000	\$0,000	0.0100	LOCAL SALES TAX	KERN, COUNTY OF	20501

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4. UNINSTALLING AND UPDATING

A. Uninstalling the CCH SureTax Add-on

To uninstall the CCH SureTax add-on, you can delete the CCH SureTax solutions:

- Go to Power Apps site (e.g. <https://make.powerapps.com/>)
- Select your environment.
- Select Solutions from the left navigation.
- Delete solutions in below order
 1. Delete CCH® SureAddress™ for FieldService Extension Solution
 2. Delete CCH® SureAddress™ for SureTax Extension Solution
 3. Delete CCH® SureAddress™ Solution
 4. Delete CCH SureTax Field Service solution
 5. Delete CCH SureTax Base solution.
- Note: This will delete all data, so please backup CCH SureTax data (if needed) before proceeding.

B. Updating a CCH SureTax Add-on

To update to a newer version of the CCH SureTax add-on, do the following:

- Follow the same directions and install the CCH SureTax Add-on. This will update the existing solutions.

5. Appendix

A. How CCH SureTax API is used

- All calculation requests are sent as Quotes to CCH SureTax, except for Finalized requests, which are made when an Invoice is paid.
 - If CCH SureTax returns an error during tax calculation, the add-on stops the system from posting the document within Dynamics 365 Sales.
- Freight is sent as a separate line item to CCH SureTax.
 - If Stocking Unit preference > Transaction Type Option is set to SKU, "Freight" must be mapped in CCH SureTax.
- Country field used in all Address fields expect a 2 digits ISO code. If no country is set, CCH SureTax will send a blank string for country code.
- Currency is expected to be for the country of the Ship-To address (CCH SureTax API does not perform currency conversion).
- Discounts:
 - Discounts are subtracted from line item amounts before they are sent to CCH SureTax for tax calculation.
 - Header Discounts are applied proportionally to all line items before they are sent to CCH SureTax for tax calculation.

B. CCH SureTax API Mapping for Tax Calculation

For the below, left is CCH SureTax data and the right describes what is used from Dynamics 365.

Each CCH SureTax transaction is created with the following data at the header level:

- <ClientNumber> - From CCH SureTax Basic Config
- <ValidationKey> - From CCH SureTax Basic Config
- <DataYear>, <DataMonth> - Transaction Date from CCH SureTax Settings
- <CpmlDataMonth>, <CpmlDataYear> - Compliance Date from CCH SureTax Settings
- <ResponseType> - "12C<CURRENCY_PRECISION>", e.g. if currency precision is 2 in Dynamics 365, then 12C2 would be used, the number 2 (on the right) sets the tax calculation response's decimal precision.
- <ResponseGroup> - "00"
- <STAN> - blank
- <TotalRevenue> - Sum of all line amounts including Freight with discounts subtracted.
- <ReturnFileCode> - "Q" used all times except "0" for when invoice is posted.

Each CCH SureTax line item is created with the following data (Freight is considered as a line item):

- <InvoiceNumber> - The ID of the respective entity, which can be Opportunity ID, Order ID, Quote ID, or Invoice ID.
- <LineNumber> - In order and increments starting with 0, but 'freight' is the value used for the Freight line item.
- <CustomerNumber> - Account Number is sent if 'account' is selected. If contact is selected and the contact is part of the account, then the account number would be sent. Else contact name would be sent
- <RegulatoryCode> - The Regulatory Code (Provider) from Field Service > CCH SureTax Sales Config
- <SalesTypeCode> - The Sales Type Code (Customer) from Field Service > CCH SureTax Sales Config or Accounts/Contacts CCH SureTax Settings
- <LocationCode> - blank
- <TransDate> - Transaction Date from CCH SureTax Settings
- <Revenue> - Amount for the line item. Any discount will be subtracted before in the price sent.
- <TaxIncludedCode> - "0"
- <Units> - Line item's Quantity
- <FreightOnBoard> - "blank" (default). Can be configured in CCH SureTax Shipping Method Settings
- <AuxRevenueType> - "01" (default)
- <AuxRevenue> - "0" (default)
- <TaxSitusRule> - Use "22" for General sales. This is configured at Field Service > CCH SureTax Sales Config and Products CCH SureTax Settings.
- <RuleOverride> - "0" (Default). This can be configured in Field Service > CCH SureTax Sales Config.
- <UnitType> - Use "99" for General sales. This is configured at Field Service > CCH SureTax Sales Config and Products CCH SureTax Settings.
- <CommonCarrier> - "blank" (default). Can be configured in CCH SureTax Shipping Method Settings
- <CurrencyCode> - Dynamics 365 Currency Code
- <TaxExemptionCodeList> - From Field Service > CCH SureTax Sales Config or Account/Contacts CCH SureTax Settings.
- <ExemptReasonCode> - From Field Service > CCH SureTax Sales Config or Account/Contacts CCH SureTax Settings.
- <TransTypeCode>
 - Field Service > CCH SureTax Sales Config > Stocking Unit preference drives whether to use Transaction Type Code or SKU information (note SKUs must be mapped in CCH SureTax to use the SKU option)
 - If set to Transaction Type Code, the Transaction Type Code will be used for the GP Item.
 - This is configured at Field Service > CCH SureTax Sales Config and Products CCH SureTax Settings.
 - If set to SKU, the Product ID will be used. For write-in Products, Write-In Product (User entered value) will be used.

- If Field Service > CCH SureTax Sales Config -> SKU Option is set to Product Family, then the Product ID of the parent is used.
- <ShipToAddress> - Ship To address entered on the form.
 - Note that Will Call toggle on supported forms do not affect tax calculation, the correct Ship To address is expected to be filled on the form.
- <ShipFromAddress>
 - Default Ship From address entered in Field Service > CCH SureTax Sales Config.
- <BillToAddress> - Bill To address entered on the form.

C. Customized Entities and Plugins

This CCH SureTax add-on uses customized entities and plugins to integrate seamlessly with Dynamics 365 Field Service.

Please view the CCH SureTax for Dynamics 365 Field Service Detailed Technical Documentation (DTD) for more information.

6. Known Issues

- Entity Key creation may fail after installation of the Package. This can affect Entities used for 'Import SureTax Data'. If there are any failed keys, 'Import SureTax Data' will check for and attempt to fix failed keys. If this happens, you must wait for system jobs to finish before attempting to 'Import SureTax Data'.

7. Release Notes

- v1.0.0
 - Initial release
- v8.8.40.20210510
 - Support for D365 Field Service Application version - 8.8.40.141
 - Add support for Purchase Order, RMA, RMA Receipt, and Purchase Order Bills
 - Add Disable Auto Calc feature with a Calculate Tax button on each relevant forms.
 - Add Calc Option for Non-Taxable Items option
- V8.8.51.20211020
 - Support for D365 Field Service Application version - 8.8.51.xx
- V8.8.54.20211212
 - Support for D365 Field Service Application version - 8.8.54.xx
 - Added support for Base solution with CCH SureTax Project Operations.
- V8.8.61.20220401
 - Add SKU Preferences functionality
 - Support for D365 CE 2022 Wave 1 release for GA
 - Fix what is sent for <CustomerNumber>