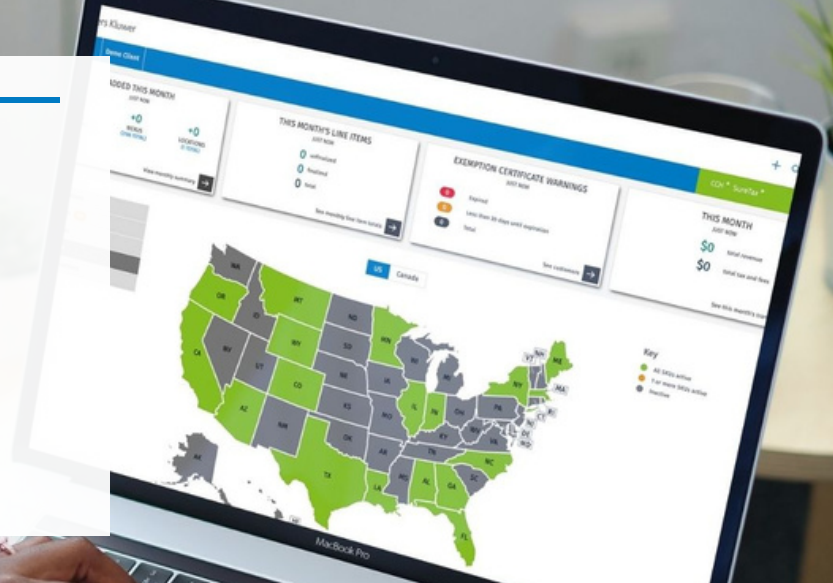


# CCH® SureTax® for Microsoft Dynamics 365

## Datasheet



## The sales tax software built and hosted on Microsoft® Azure

100% built with extensions and hosted on Microsoft Azure, CCH® SureTax® is a natural sales and use tax platform choice for Microsoft Dynamics 365. Together, they bring the best of the powerful enterprise resource planning (ERP) system and the best-in-class end-to-end sales and use tax compliance platform. Enhance your sales and use tax compliance accuracy with the most comprehensive sales taxability content from CCH SureTax, seamlessly integrated with Microsoft Dynamics 365.

## Why partner with CCH® SureTax®

- Always up-to-date certified Microsoft Dynamics 365 integrations
  - Dynamics 365 Business Central CCH® SureTax® supports AR, AP, and service modules.
  - Dynamics 365 Finance & Operations — AR, AP, Projects/Constructions, and Commerce.
  - Dynamics 365 Customer Engagement Cloud — AR, AP, Project Operations, and Field Service.
- Hosted on Microsoft Azure

CCH® SureTax® is 100% built with extensions
- Transactions, quotes, and discounts
  - Transactions — Maintain accurate, consistent, and transparent application of sales tax rates for all customer transactions. Mitigate the risk of penalties and easily respond to audit inquiries.
  - Quotes — Provide accurate price estimates (including applicable taxes) in real-time. CCH® SureTax® allows you to quickly and accurately respond to this customer demand.
  - Discounts — Stay competitive. Easily handle discounts and promotions within the platform.
- An open API platform

Partners can customize specific needs for end-user customers

## How CCH® SureTax® works

All modules in the CCH SureTax platform interconnect to enable seamless data flow without staff interference. The improved data integrity provides more accurate results than other solutions on the market, which require additional data manipulation.

- 1 Seamlessly integrate CCH SureTax with Microsoft
- 2 Apply correct rates and rules, calculate, and collect taxes precisely
- 3 Prepare and file accurate returns
- 4 Use enhanced reporting to build a strong audit defense

## The most tax heavy-regulated industries trust our solution

- Manufacturing
- Telecom
- Construction
- Retail & Wholesale
- Distribution
- Food & Beverage
- Leasing & Rental
- Cannabis
- Automotive
- Restaurant
- Grocery and more...

## Expert implementation

Work with Wolters Kluwer tax experts to understand and uncover all your business and technical requirements.

Experienced with Microsoft integrations, our team will provide you with a proven and transparent approach to project fulfillment.

## Expert tax research team

Tax research process is Service Organization Control Type 1 (SOC-1) and SOC-2 compliant. Wolters Kluwer maintains internal controls to provide customers with accurate, timely, and reliable sales tax rates and taxability rules.

***“Our company is approaching 1,000,000 transactions a month. The ability CCH SureTax gives us to map this data into returns automatically is crucial to our job functions. I would recommend Wolters Kluwer’s products and services to other sales and use tax professionals.”***

Kirk Worthen  
Tax Accountant  
Scentsy

- **Expertise trusted by tax professionals over decades.**  
The IRS has been using Wolters Kluwer’s rates and rules for more than 15 years.
- **High-performance calculation engine.**  
Calculate sales and use tax effortlessly even for the most complex industries with high audit risk.
- **No unjustified drastic price changes.**  
We are committed to fair and transparent pricing strategies.
- **Exceptional customer service.**  
We are always there for you, from implementation to product support.
- **Individualized approach to each customer.**  
Your success is our success.

### Addressing Common Challenges

#### Constant Tax Legislation Changes:

Sales and use tax rates and rules vary and change widely by locale. CCH® SureTax® data experts keep up with every change to assure you have the correct, current data at all times. This is especially important as your company grows, reaches nexus in new locations, and tax obligations broaden.

#### High Audit Risk:

On average, our clients report their audits lasting between 1 to 3 years. If not prepared, this can be a very stressful event for all levels of a company. Designed from the ground up to mitigate audit risk and reduce the total cost of compliance, CCH® SureTax® creates an audit trail and allows calculation results to be re-created and defended.

#### Wayfair Decision or Economic Nexus:

In addition to physical nexus, companies now must register with tax jurisdictions where they have reached a specific sales threshold whether they have a physical presence or not. The CCH® SureTax® dashboard enables users to monitor nexus status and receive timely notifications of when their business is approaching the states’ thresholds.

### Modules

#### Rates and rules

CCH® SureTax® makes sure your company stays ahead of the 24,000+ state and local tax jurisdictions. Our team of dedicated tax researchers and experts stay up to date with the over 100,000 tax changes per year to ensure you have the most accurate rates and rules at your fingertips.

#### Calculation

CCH® SureTax® Calculation automatically validates the address of a transaction and applies the correct rates and rules in milliseconds. This allows you to collect and remit precisely what is needed, every time, instantly.

#### Nexus tracking

The dashboard enables its users to track and monitor nexus status and receive timely notifications of when their business is approaching the states’ threshold.

#### Returns

Your tax data flows directly from the calculation engine to returns; no need to import, export, or consolidate data from multiple sources. The forms are interactive; you can edit values, and it will automatically recalculate the other fields accordingly. Also Managed Services are available for customers’ convenience.

#### Exemption Certificates Management (ECM)

This module was designed to manage exemption certificates effectively within the platform. This allows you to quickly and easily locate and apply them to relevant transactions.

#### Reporting

Get valuable insights with the most advanced business intelligence tool available on the indirect tax software market. Our platform allows you to identify trends, analyze sales on a deeper level, and make informed decisions to best support your company as it grows.

### About Wolters Kluwer

Wolters Kluwer (WKL) is a global leader in professional information, software solutions, and services for the healthcare; tax and accounting; governance, risk and compliance; and legal and regulatory sectors. We help our customers make critical decisions every day by providing expert solutions that combine deep domain knowledge with technology and services. Wolters Kluwer reported 2022 annual revenues of €5.45 billion. The group serves customers in over 180 countries, maintains operations in over 40 countries, and employs approximately 19,800 people worldwide. The company is headquartered in Alphen aan den Rijn, the Netherlands. Wolters Kluwer shares are listed on Euronext Amsterdam (WKL) and are included in the AEX and Euronext 100 indices. Wolters Kluwer has a sponsored Level 1 American Depositary Receipt (ADR) program. The ADRs are traded on the over-the-counter market in the U.S. (WTKWY).

[CCH SureTax on Microsoft AppSource](#)

[Instantly book a consultation](#)

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