

Tax & Accounting

CCH[®] SureTax[®] for Microsoft Dynamics[®] 365 for Operations

Corporate

CCH SureTax for Microsoft Dynamics[®] 365 for Operations is a cloud-based indirect tax calculation engine addressing the needs of single- and multichannel businesses across diverse industry verticals, including general sales and use tax such as food and restaurant, retail and merchandising, construction, manufacturing and distribution, communications, and energy and utilities. CCH SureTax combines industry leading tax rates and taxability content with precise jurisdiction information, supporting the most complex sourcing and tax calculation rules found in sales and use tax. As the premier sales and use tax solution from Wolters Kluwer, CCH SureTax provides:

- **Industry-leading Sales Tax Rates & Taxability Coverage** — Our expert content covers retail, manufacturing, distribution, food, communication, energy and other industries. Working with current and accurate tax rates and taxability provides the highest protection against negative sales tax audits, over payments and class action suits.
 - VAT content is also available.
- **Seamless Microsoft Dynamics[®] 365 for Operations Integrations** — CCH SureTax provides a flexible interface with an easy-to-use API that can be integrated to A/R, A/P and Projects.
- **Streamlined Workflow** — CCH SureTax delivers a simple and intuitive user experience to support daily activities such as updating, monitoring and reporting.

- **Long-term ROI** — A scalable cloud-based solution, CCH SureTax easily deploys into your current business configuration. CCH SureTax was developed on a flexible platform to support your business growth giving you long-term return on your investment.
- **Flexible Pricing** — Price plans designed to meet your changing business needs — no more worrying about excessive overage charges.
- **Secure Environment**
 - Security — SSAE 16 SOC 1 and SOC 2 Compliant
 - Dedicated instances available for enterprise/high volume customers
- **Rely on the Most Trusted Source** — Backed by more than 100 years of unparalleled tax and legal research, CCH SureTax represents the industry standard for sales & use tax data and automation. Tax information so accurate, even the IRS uses it!
- **Generate Detailed Reports** — The CCH SureTax reporting engine delivers data-rich reports that enable the review and reconciliation of a wide variety of financial and service data elements. All client tax calculation results are auto-aggregated in remote data repositories so you can easily access detailed standard reports that will support your monthly tax compliance, regulatory reporting, reconciliation, revenue analysis and audit defense.

CCH SureTax at a Glance

- **Easy Setup** — We developed our own workspace to simplify your integration to CCH SureTax. You will see a snapshot of all Microsoft Dynamics® 365 forms that need to be configured and real-time updates. There is no special hardware or software required to provide detailed tax calculations or retrieve data-rich reports.
- **Ensure Accuracy and Reduce Risk** — CCH SureTax helps you to accurately bill and collect transaction taxes. It maintains the proper taxes and rules across all your service jurisdictions and properly applies those rules to all your offerings.
- **Simplify Customer Exemption Management** — Save time with customizable transaction and market segment tax exemption and override handling.
- **End-of-Month Compliance Support** — All results can be easily retrieved for in-house and remittance systems or made available to any compliance service provider.
- **Quotes** — In addition to robust tax calculation results, CCH SureTax delivers tax “quotes” — tax calculations for a product or service that are separate from the tax calculations for monthly reporting. This feature can also be useful for implementations such as performing taxing “what-if” analysis, tax amounts for shopping carts, and enabling quick delivery of tax information to customer support staff.
- **Transparency** — Provides transparency by storing detailed calculation values for each transaction, including nontaxable and tax exempt revenue, tax breakpoints for tiers/thresholds and tax on tax. You can review the granular calculation results anytime via your web portal.
- **Implementation, Training and Consulting Services** — Avoid third party implementation fees and work with a team of proven experts who will be with you for the long term. A pre-defined project methodology including system configuration and setup services helps you start processing more efficiently.

