CPA
Practice Advisor

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CCH, a Wolters Kluwer business – CCH CorpSystem Sales Tax SaaS PRO – 6995

www.salestax.com

866-513-CORP

Best Fit:

Firms or managers overseeing the transaction tax needs and compliance of multiple businesses and who want rates integrated live into the business' accounting systems. The system is also suited to those with increasingly complex reporting requirements in many locations.

Strengths:

- Rates, rules, and calculations are integrated in real time with sales transactions
- Compliance and remittance with full transparency back to calculations

- Approval processes with routing and electronic sign-off

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- Does not offer direct e-filing/payment to state taxation agencies

CCH purchased SpeedTax in 2011, and has since merged its offerings with CCH's existing sales tax products onto a single platform. CorpSystem Sales Tax SaaS is available in three versions: CORE, PLUS and PRO, with the last being designed specifically for accounting or tax professionals managing the sales and use tax compliance of multiple client entities. The CORE system provides the automated and integrated sales tax rate system, while the PLUS system adds additional functionality, most significantly automated return filing and remittance, which is handled as an outsourced service by CCH.

Basic System Functions

Initial setup of CorpSystem Sales Tax SaaS requires configuring the web-based tax calculation system (CORE) to work with the business' accounting, sales or ERP application. The SaaS application provides instant rate lookup while transactions or estimates are being processed, with the tax engine verifying address, taxability and rates based on, nexus, specific geographic information and ZIP Code data. Because implementation can be somewhat technical, CCH staff aid in this setup.

For most day-to-day purposes, users aren't required to have much interaction with the system. The software works in the background to automatically search for and calculate the appropriate rates for a transaction, then inserts the tax liability into the transaction. This works for both locally-installed or SaaS sales and accounting applications, as well as e-commerce systems. The CORE tax engine is designed to be

used by a single business entity with any number of locations and subsidiary units.

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more filing deadlines and jurisdictional rules.

The PRO version allows an accounting firm to have a single login to oversee the sales tax processes of multiple client businesses. Customization is available in all of the versions and modules. Firms can set user-level access to specific features, configure the approval process, and task and filing deadline alerts that can be sent via email.

Compliance Capabilities

The CORE calculation engine includes constantly updated rates for more than 14,000 U.S. and Canadian sales taxing jurisdictions, as well as special taxability rules and date-based rules for items that are treated differently in various states, plus sales tax holiday information and maximum taxes. The system includes a calendar of taxation due dates and rules, such as requirements for zero-sum reporting.

The CorpSystem Sales Tax PLUS version offers comprehensive forms and instructions for all states and local jurisdictions. The system automatically prepopulates forms with necessary transactional data pulled from the accounting system, and generates appropriate GL transactions, but it does not offer built-in direct e-filing to taxing entities, though does support remittance through SST. However, users can choose to outsource the filing and remittance processes to CCH's U.S.-based professional staff. Accountants using the PRO version also have full oversight into all reporting and filing functions for all of their clients using the system.

CorpSystem Sales Tax SaaS offers real-time tax reports and can be set to offer multi-user approval routines. Management reporting options including summary and

detail reports on transactions going back up to seven years, including drill-down to

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Integration/Import/Export

Direct integration into the sales and accounting system used by the business is the key benefit to entities using CorpSystem Sales Tax SaaS, because it enables them to have sales tax rates instantly applied as users or online customers enter transactional data. The system can be synced to all common business accounting, sales, e-commerce and ERP systems, including QuickBooks, Microsoft Dynamics GP, NetSuite, Sage ERP MAS 90/200 and Accpac, and Intuit. Reports and returns can be saved to formats including Microsoft Excel, Microsoft Word and PDF.

Help/Support

As a web-based utility that interfaces with a business' accounting system, all of the support features within the management consoles of CorpSystem Sales Tax SaaS and the PRO version are web-based. The program does not have a traditional help utility, but the extensive online support center includes FAQs, a sales tax calculator, webinars, sales tax resources, an interactive state sales tax map and other additional tools. Live and web-based support is included in pricing.

Executive Summary & Pricing

CCH's CorpSystem Sales Tax SaaS offers integrated, real-time tax rates updated by CCH and feed directly into transactions and estimates. The additional return preparation and management resources in the PLUS version increases the value of the overall suite, and allows businesses and firms to automate all filing and remittance functions. The PRO version, with its single login and access to reporting, management and filing information for all client businesses, is a great resource for

firms with multiple clients for whom they provide sales and use tax compliance

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Sales Tax

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