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divisions, multiple ERP modules, or even multiple ERP systems.

Mary Girsch-Bock • Jun. 13, 2016



From the 2016 reviews of Sales and Use Tax Systems.

Product Strengths:

- Product offers a great deal of flexibility which is paramount for corporations with more complex sales and use tax needs
- Product integrates with common ERP systems and other accounting/financial applications
- Integrates with CCH Sales Tax Returns Online to automatically process and file tax forms
- Product is highly customizable

Potential Weaknesses:

- Product is not well suited to accounting firms or CPA's that handle indirect tax calculation management for clients

Best Fit: CCH Sales Tax Office from Wolters Kluwer Tax & Accounting North America is well suited to larger corporations that have more complex sales and use tax needs, while integrating seamlessly to many billing and ERP platforms.

Basic System Functions: 5 Stars

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CCH Sales Tax Office is typically set up with assistance from Wolters Kluwer professionals to ensure that the system is configured to meet the needs of any business or corporation. Setup options vary for businesses, and users can easily assign specific system permissions to staff and other system users as needed. CCH Sales Tax Office is designed to seamlessly integrate with Microsoft Dynamics, SAP, Intuit and other software providers.

E-Commerce and Automation: 4.5 Stars

Wolters Kluwer updates tax rates monthly, with users able to easily login to the support center to download any updates. The taxability mapping process is a great feature for those selling multiple products with varying taxing requirements. The mapping process allows businesses to link their product list to industry codes, ensuring that the correct tax rates are calculated and applied whenever a corresponding product is sold. This automation allows business owners to be assured that the correct taxes are being calculated and applied accordingly. The product also employs advanced geocoding and spatial analysis technology that helps to ensure accurate tax collection. The product examines customer data such as ship-to, ship-from, order placement and order approval addresses, and determines the correct address, so businesses will not collect unnecessary taxes from customers.

The product offers a high level of flexibility, with users able to choose from a variety of criteria when determining the correct tax rates, including the ability to calculate taxes at the line item level. Users also have the option to calculate sales tax based on multiple ship-from and ship-to combinations that can present in a single invoice. CCH Sales Tax Office will also calculate taxes based on more complex criteria such as minimum and maximums that are set in various tax rules, as well as tax brackets, tax charts and tiered taxes.

Reporting Tools: 4.75 Stars

CCH Sales Tax Office offers good reporting capability, with users able to run end-of-

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print the processed forms, sign and mail for those jurisdictions that do not offer an e-filing option.

Integration: 4.75 Stars

CCH Sales Tax Office offers complete integration with ERP Systems such as Microsoft Dynamics®, SAP, and NetSuite, as well as popular e-Commerce systems. Open Application Programming Interface (API) kits are available from Wolters Kluwer, and are designed to provide easy integration between other systems and CCH Sales Tax Office.

Taxability rules and tax rates can be completely customized by the user, with the option to create custom groups and items, as well as custom exemptions for customers. Users can also override the default tax calculations, including both taxability overrides and tax rate overrides. Users can also enter custom tax rate calculations as needed.

Exemptions are handled well in CCH Sales Tax Office, with users able to use one of the 15 built-in exemption reason classifications. Users also have the option to create custom exemption classes as needed. Multi-state tax requirements can also be handled in the product, with users able to manage multiple tax rates and calculations for each customer without having to maintain multiple customers in the system.

Support:5 Stars

The base system of CCH Sales Tax Office includes an all-states subscription to Wolters Kluwer general merchandise data, a Subscription Update Manager utility, and web services API that allow users to integrate the product with their current ERP or accounting software system. Wolters Kluwer also offers specialized product group

and item databases for specialty markets such as food, restaurants, energy,

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Overall Rating: 4.75 Stars

Automation • Sales Tax • State and Local Taxes

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