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866.513.2677

www.cchgroup.com

From the [July 2013 Review of Sales and Use Tax](#) systems.

Best Firm Fit: Businesses or firms that need a sales tax calculation solution integrated into their live systems and an automated returns preparation tool with the option to outsource their tax return compliance work to CCH.

Strengths

- Rates, rules, and calculations can be linked to the 9-digit Zip+4 code associated with a location and used to calculate sales tax in real time through a number of applications.
- Excellent coverage of more than 14,000 jurisdictions in the US and Canada, and rules include tools for date-related events like back to school sales tax holidays.
- Product is a Certified Service Provider for Streamlined Sales Tax.
- Optional PLUS suite includes auto-population of state tax forms, PRO version includes tools for managing multiple entities or multiple clients.
- Includes a workflow process for routing and digitally approving returns, as well as reminders and alerts for due dates and tasks.

Potential Limitations

- E-filing and payment to state taxation agencies primarily available for Streamline Sales Tax member states.

Overview

CCH Sales Tax SaaS is a cloud-based tool for calculating sales tax and preparing returns for multiple entities. The three versions of the application are:

- **Sales Tax SaaS CORE**, which includes the rates, rules, and calculation engine

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CCH also offers a service bureau compliance model where CCH manages all sales & use tax returns and remittances for the company. More information on this option is available from CCH upon request.

Sales Tax SaaS includes some features for electronically approving returns, as well as reminders for due dates. Color coding in the screens denotes fields which have been overridden so reviewers can know to pay extra attention to those amounts. The software does not allow support electronic filing or online payment of taxes, but this service is provided to those who outsource preparation and filing of taxes to CCH.

This application is one of the three products reviewed which is a sales and use tax rate engine. The product is designed to calculate sales tax for each individual transaction, and then use the resulting database to prepare the sales tax returns. CCH's online database of products allows users to assign items they sell to a product type code which is used as part of the determination if an item is taxable.

Users (or CCH) also flag the jurisdictions where they have nexus so the application will withhold sales tax on those transactions. An integrated exemption certificate management tool is also included as part of this application.

CCH Sales Tax SaaS is one of two products in this review which is a Streamline Sales Tax certified service provider, and the product fully supports the SST nexus rules. Streamline Sales Tax is an initiative approved in 22 states to calculate, withhold, and remit sales tax based on the delivery location and not the shipping location. For more information on Streamline sales tax, visit www.streamlinesalestax.org.

Support is US based, and is included with the application. Normal support hours are 8A-7P ET, however, after hours support is also available in emergencies for an extra charge. In addition to phone support, users can receive help via live chat.

Summary & Pricing

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Integration/Import/Export: 4.75 Stars

Help/Support: 4.75 Stars

2013 Overall Rating: 4.75 Stars

Sales Tax • Small Business

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