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including the number of entities, the number of returns, and the features purchased. Specific pricing is available upon request.

Brian Tankersley • Jun. 11, 2014



Basic System Functions

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 that works with major ERP applications from Microsoft Dynamics (AX, NAV, and GP), NetSuite, QuickBooks, and some offerings from Sage.
- **Sales Tax SaaS PLUS**, has all of the features of the CORE application, and also allows users to populate data from the sales tax application directly into returns for all jurisdictions in the US. PLUS can also be purchased as a stand-alone application to automate returns population via a data upload feature.
- **Sales Tax SaaS PRO**, which includes the features of both CORE and PLUS. This version allows users to work on multiple clients or entities from a single login. User rights can be assigned to different team members, and alerts can be configured to deliver reminders and deadline alerts directly to e-mail.

CCH also offers a service bureau outsourcing model where the company uses the

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maintains an audit trail showing where each number on a return came from. CCH also offers a sales tax solution called Sales Tax Office targeted at the in-house tax departments for multi-billion dollar companies, which is not part of this review.

CCH Sales Tax SaaS is one of two products in this review which is a Streamlined Sales Tax certified service provider, and the product fully supports the SST nexus rules. Streamlined Sales Tax is an initiative that has, to date, been approved in 24 states to calculate, withhold, and remit sales tax based on the delivery location and not the shipping location.

The tools used for streamlined sales tax can also be used to comply with some of the state statutes which require out-of-state online sellers like Amazon to withhold, report, and remit taxes based on the address of the purchaser. CCH has partnered with third parties to provide address verification and geospatial location the tax jurisdictions applicable for each site so that the proper sales tax rate can be collected, reported, and remitted for each transaction.

The company maintains databases to help users determine the taxability of items, look up the proper rates, and report the calculated amounts to their secure servers. As mentioned above, the solution integrates with many major accounting and ERP solutions, and it provides address and jurisdiction verification as well as looks up the current rates before calculating the sales tax for each line item on an invoice.

Support for CCH's sales and use tax solutions 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.

Best Fit: Companies that need a sales tax calculation and compliance tool which has an option to outsource tax return compliance to CCH. Businesses or firms that need

current rates and a tax calculation engine to compute sales tax at an individual

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over 14,000 jurisdictions in the US and Canada as well as rules for events like back-to-school sales tax holidays.

- Sales Tax SaaS is a Certified Service Provider for Streamlined Sales Tax.
- The midrange Sales Tax SaaS PLUS product includes automatic data population into forms, and the higher-end PLUS version has tools for managing workflow and due dates, as well as the ability to set varying access levels for multiple users.
- The Sales Tax Returns Online solution provides a toolset for automatically populating electronically-submitted sales and tax liability data into signature-ready PDF returns for each applicable jurisdiction and physical location where taxes are collected.

Potential Limitations:

- The Sales Tax SaaS PLUS tool currently uses PDF-based forms rather than web-based forms and does not currently support electronic return filing and online remittance of payments. (Note: Sales Tax SaaS PRO should not be confused with CCH's Sales Tax Returns Online solution for the in-house tax compliance staff at large companies, which supports a number of advanced features, including electronic filing and remittance of taxes.)

Summary & Pricing

CCH's sales tax compliance applications are priced based on a range of factors, including the number of entities, the number of returns, and the features purchased. Pricing for each system starts at \$2,041. Specific pricing is available upon request.

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