and Restaurants, along with general sales and use tax. The product is a ...

Mary Girsch-Bock • Jun. 13, 2016

From the 2016 reviews of Sales and Use Tax Systems.

Product Strengths:

- Integrates with a variety of ERP systems
- Can calculate taxes for a variety of vertical markets from the same platform
- Multiple product deployment options available
- Product is scalable

Potential Weaknesses:

- Array of features may be overwhelming for small business owners

Best Fit: CCH SureTax, from Wolters Kluwer Tax & Accounting North America, is optimally designed for end-users such as B2B and B2C companies that provide products and services to customers in many different industries. CCH SureTax is scalable and suitable for just about any size business.

Basic System Functions: 5 Stars

One of the more unique aspects of CCH SureTax is the ability to calculate taxes for a

monitors as needed. Drop down menus are available throughout CCH SureTax, reducing the amount of data entry needed. The Tools option provides users with a lookup feature, where users can look up taxing rates and rules for a specific product/service and jurisdiction.

CCH SureTax supports an unlimited number of system users, with administrators able to add user roles depending on what type of system access is required.

E-Commerce and Automation: 5 Stars

During product setup, transaction type codes are mapped to product codes to ensure accurate tax calculations. During product setup, users can import product data directly into CCH SureTax, along with other information as needed. CCH SureTax currently offers taxability information for over 1,500 product and service types, so users can be certain that a specific product is taxable, and if taxable, that the rate is correct. Nexus configuration is also available in CCH SureTax, and the system will not collect taxes for any jurisdiction where there is not nexus.

As a hosted solution, all system and data updates are completely automatic, so users are assured that all of the information in the system is accurate. A web portal is also available and offers an easy to use interface where users can check tax outcome totals, examining what tax transactions make up each tax total. Users can easily handle overrides, customization and exemptions for any customer directly through the web portal as well, with any overrides completed automatically updating the system in real time. In addition, VAT output rates are supported out of the box.

The CCH SureAddress function provides immediate clarity on addresses, making sure that both tax jurisdictions and shipping/mailing addresses are correct. CCH SureAddress can take any incomplete address or inaccurate address, and uses an algorithm to determine the correct address, complete with zip+4 details. Users can

simply choose an address and click on the Submit function to quickly verify an

can be used as a stand-alone product, or in conjunction with CCH SureTax. SureQuotes allow companies to provide their customers with quotes that include the correct tax totals for each transaction, ensuring that potential customers received the correct information on any quote provided. While the quote is saved in the system, the estimated tax totals do not appear on any tax or compliance forms so that tax quotes will not be included in reporting or remittance totals.

Reporting Tools: 4.75 Stars

CCH SureTax offers a good selection of reports including Tax Compliance, Regulatory, States Reconciliations, and Taxes by Invoice. All reports can be filtered by date, and can be exported to Excel as a spreadsheet file, or saved as a PDF.

For those in the telecommunications industry, CCH SureTax Customer Exemption Smart Charts provides users with thousands of lines of telecom tax data and exemption certificate information, including quick access to 20 categories of customer exemptions that are distributed over 28 different tax types for all 50 states. The product also includes more than 17,000 possible exemption scenarios. The product also offers pass-through tax capability, which was created and typically utilized by the telecommunications industry, but can be easily utilized by other industries as well.

Integration: 4.75 Stars

Companies that utilize an e-commerce shopping cart mechanism on their website will appreciate the ease with which CCH SureTax can calculate tax on any purchase. An included API makes it easy for the product to easily integrate with a variety of shopping cart platforms.

CCH SureTax integrates with most ERP systems including jBilling, Microsoft Dynamics AX, Microsoft Dynamics GP, and Microsoft Dynamics NAV, as well as

NetSuite, and QuickBooks. Integrations coming in the near future include Magento,

offers scalable pricing, and is based on the number of transactions processed monthly. Those interested can contact Wolters Kluwer for additional pricing information.

Overall Rating: 5 Stars

Automation • Sales Tax

CPA Practice Advisor is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors.