CCH® SureTax® Platform for Microsoft Dynamics 365 and Microsoft Dynamics 365 Universal Tax API, Finance & Operations

CCH® SureTax®
by Wolters Kluwer

Microsoft Dynamics 365

Trusted sales tax software built and hosted on Microsoft Azure

100% built with extensions and hosted on Microsoft Azure, CCH® SureTax® is a natural sales and use tax platform choice for Microsoft Dynamics 365. Bring together the power of Microsoft Dynamics 365 with best-in-class, end-to-end sales and use tax full-process automation. Enhance your sales and use tax compliance accuracy with the most comprehensive sales taxability content from CCH® SureTax®, seamlessly integrated with Microsoft Dynamics 365.

Why partner with Wolters Kluwer for CCH SureTax?

Always up-to-date and certified Microsoft Dynamics 365 integrations

- Dynamics 365 Business Central (AR, AP, and service modules).
- Dynamics 365 Finance &and Supply Chain (AR, AP, Projects/Construction, and Commerce; Universal Tax API).
- Dynamics 365 Customer Engagement Cloud (AR, AP, Project Operations, and Field Service).

Microsoft validated

- Built and hosted on Microsoft Azure; 100% built with extensions
- AppSource Certified
- Available directly from Azure Marketplace
- Open API platform so partners can customize to specific customer needs

Transactions, quotes, and discounts

- Transactions — Maintain accurate, consistent, and transparent application of sales tax rates for all customer transactions. Mitigate risk of penalties and easily respond to and support audit inquiries.
- Quotes — Provide accurate price estimates (including applicable taxes) in real time; quickly and accurately respond to customer demand.
- Discounts — Stay competitive - easily handle discounts and promotions within the platform.

CCH SureTax on Azure Marketplace

How CCH SureTax works

Flexibility and extensibility allow all solution modules to interconnect, enabling seamless data flow without manual intervention. This supports improved data integrity - providing greater, more accurate results than many solutions, which require further data manipulation.

1. Seamlessly integrate CCH SureTax with Microsoft
2. Apply correct rates and rules as well as precisely calculate and collect taxes
3. Prepare and file accurate, timely returns
4. Leverage enhanced reporting enabling audit-readiness with clear audit defense

Built to handle the most heavily regulated industries with ease

- Manufacturing
- Construction
- Retail
- Wholesale & Distribution
- Food & Beverage
- Leasing & Rental
- Cannabis
- Automotive
- Grocery and more...

Expert implementation

Wolters Kluwer tax and technology experts work with you to uncover and understand your business and technical requirements.

Experienced with Microsoft integrations, our team will provide a proven, transparent approach to project fulfillment.

Built by tax experts

Tax research process is Service Organization Control Type 1 (SOC-1) and SOC-2 compliant.

Wolters Kluwer maintains internal controls to provide customers with accurate, timely, reliable sales tax rates and taxability rules.

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A trusted Microsoft foundation.
Wolters Kluwer developed and hosts CCH SureTax on Microsoft Azure. It's AppSource Certified and available on Azure Marketplace.

Seamless Microsoft integration.
Use off-the-shelf connectors for Dynamics 365 and business systems or tap into CCH SureTax for Microsoft Universal Tax API for Finance and supply chain..

- **Expertise trusted by tax professionals over decades.** Brings up-to-date, U.S. tax expertise into the Dynamics platform.
- **Powerful calculation engine.** Effortlessly compute sales and use tax—even in complex, tightly regulated industries with elevated audit risk.
- **No bait-and-switch pricing.** We believe in fair, transparent pricing—no surprise hikes. Unlike others, we earn your trust with lasting value.
- **Exceptional U.S.-based support.** From implementation to ongoing service, our expert team is always here—no offshore handoffs, no frustration.

CCH® SureTax® for Microsoft Dynamics

Stay current with >100,000 annual legislation changes

Sales and use tax rates and rules vary and change widely by locale. CCH SureTax data experts keep up with every change to assure you always have correct, timely data. This is especially important as your company grows, reaches nexus in new locations, and tax obligations broaden.

Reduce audit risk, increase preparedness

On average, customers report audits last 1-3 years. Without precise preparedness and citations to demonstrate decisions made, this can be very stressful for all levels of a company. Designed from the ground up to mitigate audit risk and reduce total cost of compliance, CCH SureTax creates an audit trail and allows calculation results to be re-created and defended.

Modules

Rates & Rules* and citations
Our expert tax researchers track over 100,000 annual changes to keep your rates and rules accurate. You can easily view which rules are applied, where, and why—giving you full transparency so you can stay audit-ready while saving time and reducing risk.

Calculation*
Automatically validate and apply the correct rates and rules in milliseconds.

Integration
Easily integrate with a multitude of ERPs, POSs, etc. using our certified connectors or third-party solutions.

Returns
Data flows directly from the calculation engine to returns. Interactive forms allow you to edit values, with automatic recalculations to other fields accordingly.

Exemption Certificate Management (ECM)
Manage exemption certificates efficiently and apply to relevant transactions with speed and ease.

Reporting
Unlock powerful sales and use tax insights, with PowerBI embedded into CCH SUreTax for interactive reports. Identify trends, analyze sales on a deeper level, and make informed decisions to best support your company as it grows.

CCH SureTax Investigator
Smarter, accurate tax research, no coding required with cloud-based tools to validate addresses, automate workflows, access industry-specific content, and customize views—all seamlessly integrated.

*Modules required

About Wolters Kluwer

Wolters Kluwer (EURONEXT: WKL) is a global leader in information, software solutions and services for professionals in healthcare; tax and accounting; financial and corporate compliance; legal and regulatory; corporate performance and ESG. We help our customers make critical decisions every day by providing expert solutions that combine deep domain knowledge with technology and services. The company reported 2024 annual revenues of €5.9 billion. The group serves customers in over 180 countries, maintains operations in over 40 countries, and employs approximately 21,600 people worldwide.

Wolters Kluwer CCH® SureTax® for Microsoft delivers expert sales and use tax management integrated with Microsoft Dynamics. It streamlines tax reporting, boosts compliance transparency, and simplifies local regulation handling by automating tax workflows and reducing audit risk.

For more information, visit www.suretax.com.