

Manufacturing Company Implements CCH[®] SureTax[®] for Microsoft Dynamics[®] 365

MANUFACTURING

Location: Nevada, USA

Industry: Manufacturing

SIC Code: 3826

SIC Description: Analytical Instruments

Revenue: \$47.2M (Privately Held)

Employees: 1,400+

Wolters Kluwer Solutions and Services:
CCH[®] SureTax[®], Professional and Client Services

System Deployment: SaaS (Cloud)

Challenges and Opportunities

- Manual application of sales tax and use tax to all invoices generated from legacy ERP is operationally unsustainable and carries inherent risk
- Nexus profile across 45 states but capacity impedes ability to file across all of them. Also, there is some unknown as to whether full Nexus obligations are known
- Currently doing 600 returns per year; expecting to do a 1,000 returns across all entities

Objectives

- Migrate entire global organization to Microsoft Dynamics 365 on a varied timeline
- Eliminate exposure of manual sales and use tax calculation
- Insure the sales tax vendor meets requirements and aligned with System Integrator; support phased release across all business units

Main Drivers to Implementation

- Leverage new ERP – company invested in implementing Microsoft Dynamics 365
- Eliminate manual upload to order entry system of sales tax rates and taxability rules
- Improve handling exemption management – avoid manual handling on an invoice-by-invoice basis

Benefits Derived from Wolters Kluwer Solutions

- Reduced risk of human error from manual sales and use tax processes
- Efficiency gains – exemption certificate management solution that automates the process of acquiring certificates, tracking status, communications with exempt customers, reporting and audit defense
- Automation – a time saver, and confidence booster