

# DVL Group chooses CCH® SureTax® as new sales tax software in transition to Acumatica

## CCH SureTax case study



*“We implemented CCH SureTax along with Acumatica ERP system in 2023. We needed a sales tax solution that would incorporate our complex tax scenarios effectively. We are a reseller, service provider, construction project manager, and at times a combination of these. We are also in over 30 tax jurisdictions including Colorado home rules.”*

**Kathleen Gage**, Senior Accountant, DVL Group, Inc.

### Company

DVL Group, Inc.

### Industry

Construction  
Infrastructure Services

### Solutions

- CCH® SureTax®
- CERTifyTax
- CCH® Sales Tax RADAR
- CCH® AnswerConnect

### Key facts

- DVL Group is a 100% employee-owned company
- National presence
- Headquartered in Pennsylvania

### The challenge

Since DVL Group, Inc. acquired the Colorado-based company AC Systems and its subsidiary, AC New Mexico, in 2018, it significantly expanded its territory, covering three more states, including a home-rule Colorado. Within the last 5 years, they went from filing about 15 to 70+ returns now filing each quarter.

While their legacy sales software vendor was able to provide sales tax support for state-level sales tax compliance, it couldn't handle the complexity of the home-rule state requiring local jurisdiction filings and specific exempt certificate formats. After going through a software selection process, DVL Group chose CCH® SureTax® for Acumatica for its industry-specific functionality, content and ability to handle complex tax scenarios.

### The solution

Given the expansion and the growing complexity of the business, DVL Group was on the task of automating and streamlining reporting throughout the expanding organization. They realized that their current ERP system lacked functionality relevant to their industry and made a decision to switch to Acumatica.

As a part of the transition, they considered implementing new sales tax software to help them handle Colorado's reporting complexity, and reduce additional risk factors associated in their specific industry vertical.

**CCH SureTax case study**

- Wholesale distributor and technical service provider for commercial HVAC systems, power generators, and more
- Has offices in New Mexico, Colorado and Utah.

**Requirements**

- Certified, pre-built integration with Acumatica CERTifyTax
- Sales tax solution that will support full compliance cycle
- Functionality that automates reporting for home-rule states, specifically Colorado
- Advanced exemption certificate management functionality to comply with specific certificate requirements for Colorado

***“CCH SureTax has a construction sales tax solution in addition to their standard solution.”***

**Kathleen Gage,**  
Senior Accountant,  
DVL Group, Inc.

Their choice fell on CCH SureTax due to its ability to handle complex tax scenarios, being a one-stop shop for sales and use tax platform solution, and the seamless integration with Acumatica.

One of the benefits of working with CCH SureTax is the in-house implementation services. Having tax along with technical expertise as a part of the implementation process is integral for the successful adoption of sales and use tax software, especially for a highly regulated industry.

“I was impressed with the way CCH SureTax was handling the process: weekly meetings, status reports, clearly defined goals, the progress. They worked well with Acumatica implementation teams, external and internal consultants, and were very helpful every step of the way,” - says Kathleen Gage, Senior Accountant for DVL Group. Since the company sells a mix of products and services, it was beneficial for them to have the DVL’s and CCH SureTax’s teams go through the tax codes together and map them correctly. It enabled a smooth transition for the sales tax software.

Anything that came up in the implementation and testing in both Acumatica and CCH SureTax, helped DVL Group set the expectations and solve the issues before going live.

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**Results and benefits**

The expert implementation enabled a smooth transition and support from the legacy sales and use tax platform. Acumatica and CCH SureTax's functionality was tailored to the specific company needs, streamlining sales and use tax reporting for all jurisdictions of the company's presence.

In addition to CCH SureTax, DVL Group uses CERTifyTax to improve exempt certificate management. This helped them automate the end-to-end reporting process, including for traditionally complex regions, such as home-rule Colorado. It not only saved them time on returns preparation but significantly minimized the risk of mistakes.

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**DVL Group shares what to expect when implementing Acumatica with CCH SureTax**

- What partner you work with determines if the transition goes smoothly. Make sure you choose a partner that has experience in your industry.
- Expect that the new ERP will take about 12 to 18 months, while the implementation of a new sales and use tax software alone usually takes from 3 to 6 months.
- Sales tax implementation can be done in stages. Kathleen Gage recommends first looking into rates, then returns, and exemption sales certificates last.

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- Make sure your new sales tax software can be customized to your specific needs and can handle home-rule states' requirements. It will help your sales tax team to handle the organization's growth in the future.
- Identify your process as a whole and look at what you are doing as a company. This will help you choose the most effective solutions for your situation. For example, DVL Group chose File and Remit Managed Services for filing returns instead of Fully Outsourced Managed Services due to company closing deadlines. Fully Outsourced Managed Services' closing deadline is the 5th calendar day of the month, whereas the File/Remit service is the 13th of the month deadline.

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**About customer**

DVL Group has been perfecting the science of data center infrastructure implementation for nearly 40 years. By leveraging their robust offerings and far-reaching expertise, DVL's teams across the country can better provide solutions for critical environments, from the edge to the largest of data halls. DVL is a 150+ person employee-owned company headquartered in the Philadelphia metro area, with offices across the country in Albuquerque, Denver, Harrisburg, and Salt Lake City, serving a total of 10 states.

**About Wolters Kluwer**

Wolters Kluwer (WKL) is a global leader in professional information, software solutions, and services for the healthcare; tax and accounting; governance, risk and compliance; and legal and regulatory sectors. We help our customers make critical decisions every day by providing expert solutions that combine deep domain knowledge with technology and services. Wolters Kluwer reported 2023 annual revenues of \$6 billion. The group serves customers in over 180 countries, maintains operations in over 40 countries, and employs approximately 21,400 people worldwide. The company is headquartered in Alphen aan den Rijn, the Netherlands. Wolters Kluwer shares are listed on Euronext Amsterdam (WKL) and are included in the AEX and Euronext 100 indices. Wolters Kluwer has a sponsored Level 1 American Depositary Receipt (ADR) program. The ADRs are traded on the over-the-counter market in the U.S. (WTKWY).

[www.SureTax.com](http://www.SureTax.com)

800-739-9998, Option 1

[CCH-SalesCorporateTeam@wolterskluwer.com](mailto:CCH-SalesCorporateTeam@wolterskluwer.com)