

Release Q3 2023
September 2023

CCH SureTax®

Welcome to CCH SureTax Q3 2023 Release!

This bulletin provides important information about the Q3 2023 release of CCH SureTax. Please review this bulletin carefully. If you have any questions, additional information is available on CCH [Support Online](#).

New in this Release

This Month's Line Items

"This Month's Line Items" widget in SureTax has been expanded to include quotes and cancelled line items.

TrustRadius Review Button

A button has been added below the account login credentials, allowing users to leave a review of SureTax on TrustRadius.

Custom Tax Exemptions – Import, grid view, and clone functionality

The ability to import custom tax exemption codes has been added to SureTax. Also, in addition to the current tile format, we have introduced a new grid view for tax exemption codes. The grid view provides an alternative format for customizing, filtering, and sorting exemption codes. Creating custom tax exemptions has also been streamlined with the ability to clone an existing default, CESC, or custom exemption code and modify it as needed to create a new custom tax exemption code.

Please note that tax exemption codes 8, 10, 12 are not currently available for cloning, but they will be included in a future release.

Release Notes

Users now have the ability to access release notes through SureTax. You can find the link to release notes by navigating to "CCH support" using the profile icon in the top right-hand corner of SureTax.