

Corptax Office

Connect Corptax and Excel with two-way dataflow

CSC Corptax® Office helps thousands of customers cut risk, bolster internal controls, and save time by incorporating existing spreadsheets directly into any Corptax process—provision, compliance (domestic, international, state), and planning.

Simple yet powerful, Corptax Office connects Excel® directly to your existing Corptax application. Data can be pushed from Excel to Corptax—and results pulled out with Point of View (POV) functionality—at the touch of a button. Manipulate data in Excel and push into Corptax with no need to reformat.

Ever-changing international calculations help you run different tax reform scenarios, review impacts to calcs such as GILTI, FDI, 163(j), and more—to give the C-suite answers quickly.

Maximize Excel Utility

- Decrease risk by eliminating errors due to copy/paste, duplicate entry, or manual keying of data into/out of Corptax
- Boost internal controls with audit trails on all entries from Excel to Corptax—ensuring accuracy and completeness
- Reduce change management by incorporating existing spreadsheet-based workflows into Corptax, as-is
- Save time by eliminating consolidation of data in Excel to format for import packages—simply push data into Corptax for automatic consolidation
- Streamline data collection to save time and stay accurate
- Use POV to pull calculated results from Corptax database for journal entries, account roll-forwards, effective rates, and workpapers—formatted for your auditors
- Access needed data from one central place for easy verification and fast response times

"Other vendors wanted us to completely abandon Excel and that wasn't feasible for us. With Corptax we were able to pair the two."

– Emily Mauzy, Income Tax Manager, Interstate Batteries

Immediate Results Work

By leveraging Excel, Corptax Office is not only easy to use, it's familiar. Implementation is fast and results are immediate. Standard templates are available to use as-is or modify, and it's simple to configure templates based on your preferred method of data collection, reconciliation, and reporting. Plus, Corptax Office uses security rights already set up in Corptax.

Easy In—Easy Out

Make fast work of collecting apportionment, provision, and compliance data. Create journal entries and summary reports, and explore unlimited planning scenarios with ease. Plus, complete data reconciliation in minutes. It's all possible with bi-directional dataflow from Corptax Office.

Key Features

- Visualize your data using planning templates with dashboards to understand your tax positions at a glance
- Calculate trial balances and adjustments in your Excel models—push results into Corptax
- Collect data from disparate sources quickly—push directly into Corptax
- Pull data from Corptax to populate your pre-formatted reports in Excel
- Leverage existing Corptax security profiles
- Audit all changes with system checks to ensure most recent values are in Corptax

Configurable Templates include:

- Corptax International Dashboard and Tax Planning
- Corptax Data Analytics—BEPS CbC
- Corptax Data Analytics—Provision Summary
- Corptax Data Analytics—Compliance State Apportionment
- Federal Taxable Income Report
- State Apportionment Template
- State Payments Report
- State NOL Template
- State Modifications Template
- Corptax Tax Planning—Tax Planning Template
- 4562—Depreciation and Amortization
- 4797—Gain—Loss on Sale of Assets
- 5471 Schedule M—Corptax Office Template
- Corptax Data Import—8975 Schedule A Template
- Corptax Data Import—5471 Sch I and J Template
- Adjustment Data Entry Template
- Form 851 Template

For more information, please call 800.966.1639 or visit corptax.com.

