

Vertex® Sales Tax O Series®

A Simple Solution to a Complex Process

Are sales tax errors causing your outstanding receivables to increase year after year? Is it difficult to stay on top of the latest changes in state and local sales tax rates and rules? If so, your company could face excessive audit risk and a reduction in cash flow. And, you could be setting aside more than necessary in your audit reserves.

That's why now is the time to discover Vertex Sales Tax O Series. Combining the latest technologies with industry leading tax research, this proven solution can provide your tax department with the tools necessary to deliver accuracy and consistency in every transaction, every day.

Accurate, Compliant Calculation

Through its interface with your ERP or financial application, the tax service engine in Vertex Sales Tax O Series ensures accuracy in every transaction. The solution automatically considers:

- **Situs determination** – uses the locations of the parties involved in the transaction to determine situs according to each jurisdiction's rules
- **Maximum tax** – accounts for the fact that some jurisdictions define tax limits using either a maximum base or maximum tax amount
- **Tiered tax** – applies the tiered rates that are common among jurisdictions
- **Rounding** – applies each jurisdiction's rules for rounding
- **Jurisdiction overrides** – recognizes when one jurisdiction can override another's standard rate
- **Tax holidays** – applies exemptions during tax holidays for qualifying items according to each jurisdiction's rules

In addition, Vertex Sales Tax O Series addresses a variety of other complex issues that help minimize your company's risk of noncompliance.

The Right Jurisdiction, Every Time

Vertex Sales Tax O Series makes jurisdiction identification effortless, with pin-point accuracy. The Vertex TaxGIS™ component – which includes a database of not only state, county, and city jurisdictions, but also taxing districts – automatically determines all the possible jurisdictions for each address on a transaction. From this selection, the Vertex Sales Tax O Series *situs determination logic* then identifies which jurisdiction is taxed. So you can rest assured that the correct rates are applied.

Full Access Through Vertex Central

Vertex Central is your interface for the full functionality of Vertex Sales Tax O Series. This web-based interface enables you to approach your day-to-day tax administration responsibilities more efficiently and effectively. For example, you can easily identify company-specific taxability for all transactions that are processed. And, you can conduct rate research, run reports of logged transactions for audit or reporting purposes, and apply monthly data updates.

Continual Updates

Keeping current with the many sales tax rule and rate changes can be an arduous task. But with Vertex's research staff continually identifying and updating you with monthly changes, you can be confident that your system data is always current. Updated rates and rules are available for download and easily installed in one step from the Vertex Customer Café® located at vertexinc.com.

Flexible Configuration

The Taxability Manager lets you easily configure the system to your company's requirements. For example, you can associate product identifiers or codes from your financial system to the tax categories maintained by Vertex Research. The calculation system then automatically applies the

jurisdiction-specific taxability associated with those products during invoice processing. Vertex Sales Tax O Series can also be fully customized with specific exceptions for your customers and the products they buy.

Security and Audit Log

With controlled access through role-based security, you can be assured that your tax management processes are in compliance with Sarbanes-Oxley requirements. Roles can be defined specific to your company's needs by defining exactly which areas of the application are accessible. An audit log tracks changes that were made, when they were made, and the user who made the change.

Additional Offerings

Easier Returns

With Vertex Sales Tax O Series, it's easier than ever to file returns. The solution's export process populates summarized transaction data directly into Vertex Sales Tax Returns. From there, you can quickly produce state and local tax returns based on the imported data ensuring the consistency of your tax compliance process.

Complete Reporting and Analysis

Vertex O Series also offers a full array of reporting and analytical options through Vertex Reporting and Analysis.™ Through the historical database, you can access standard transaction summary and detail reports. And, you can add more advanced or customized reports in a matter of minutes.

Vertex Reporting and Analysis also lets you conduct custom queries complete with charts and pivot tables. These reports can provide the analytical insights you need to make critical corporate performance decisions.

A Proven Provider

For businesses that want more effective technology solutions, Vertex provides a comprehensive suite of software and consulting services for both direct and indirect taxes that combine Vertex's 30 years of tax and technology experience with a fresh approach to tax consulting.

As the leading provider of tax technology solutions for customers worldwide, Vertex offers leading-edge products and services to help companies streamline tax compliance processes. With Vertex, you have a trusted partner for discovering new strategic tax savings across every major line of business tax including income, sales, consumer use, value added, communications, and payroll.

Stop Taxing Your Tax Department

To learn how Vertex Sales Tax O Series can help you simplify the complex sales tax compliance process, please call **800.355.3500** or visit **vertexinc.com**.

Vertex Headquarters

1041 Old Cassatt Road
Berwyn, PA 19312
Phone: 610.640.4200
Toll-free: 800.355.3500
Fax: 610.640.5892

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