

# Vertex® Consumer Use Tax O Series®

## Gain Control of Your Complex Purchase Transactions

Are important tax decisions made outside the tax department?  
Do you have vendors that charge inaccurate tax amounts?  
Do you have out-of-state vendors who don't charge sales tax?

Purchase transaction challenges like these could be affecting your bottom line by putting you at greater risk of an audit assessment, causing you to pay excessive taxes or forcing you to set aside unnecessary audit reserves. If this sounds familiar, now is the time to discover Vertex Consumer Use Tax O Series. Combining the latest web-based technology with industry-leading tax research, Vertex Consumer Use Tax O Series is the one fully-automated solution that handles the complexity of indirect taxes related to purchase activity.

## Automatic Calculation and Verification

Through its interface with your ERP or financial application, Vertex Consumer Use Tax O Series automates tax calculation and verification. It calculates taxes due on purchases to verify vendor-invoiced tax amounts. Any differences are compared with your pre-determined thresholds. Differences falling within threshold levels result in acceptance of the vendor charged amounts. Vendor-charged taxes falling outside the threshold can be reviewed for accuracy before the vendor is paid.

## Reduced Overpayments

To help you reduce overpayments, Vertex Consumer Use Tax O Series identifies exempt and non-taxable purchases using any number of taxability drivers, such as:

- Exemptions based on the characteristics of the goods or services purchased
- Activities and uses of the purchase within your organization

## Full Access Through Vertex Central

Vertex Central is your interface for the full functionality of Vertex Consumer Use Tax O Series. This web-based interface enables you to approach your day-to-day tax administration responsibilities more efficiently and effectively – keeping control of tax decisions within the tax department.

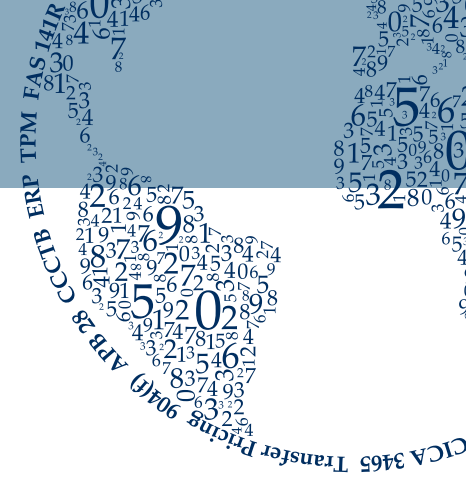
For example, you can easily identify company-specific taxability for all transactions that are processed. And, you can conduct rate research, run reports of logged transactions for audit or reporting purposes, and apply monthly data updates.

## 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 were accessible. An audit log tracks changes that were made, when they were made, and the user who made the change.

## Continual Updates

Keeping current with the many rule and rate changes can be an arduous task. But with Vertex's research staff continually identifying and updating monthly changes, you can be confident that your system data is always current. Updates to rates and rules can be downloaded in one step and applied to your system from the Vertex Customer Café® located at [vertexinc.com](http://vertexinc.com).



## Additional Offerings

### *Easier Returns*

With Vertex Consumer Use 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. You can also 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.

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## Cut Your Risk. Cut Your Costs.

To learn how Vertex Consumer Use Tax O Series can help you reduce your tax department's audit risk please call **800.355.3500** or visit **vertexinc.com**.

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