

# Vertex® Income Tax Reporting & Analysis

## Turn Raw Data into Insightful Reports

Imagine being able to turn raw tax data into valuable reports that can help you manage your taxes – and your business – more efficiently. Vertex Income Tax Reporting & Analysis makes that possible in a matter of minutes. This flexible, easy-to-use reporting solution quickly and simply generates ready-made or custom reports for tax compliance activities.

### Set Context for Tax Decisions

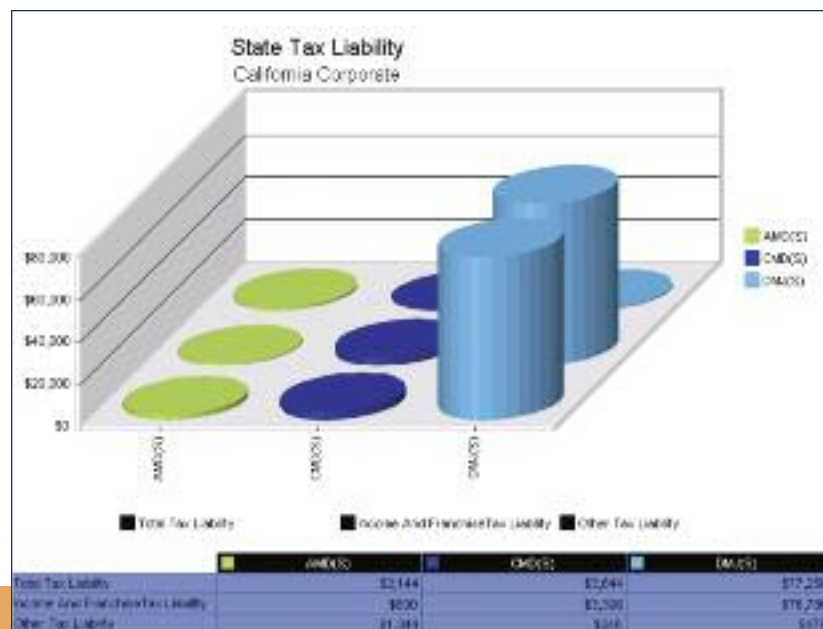
Using advanced analytical capabilities, Vertex Income Tax Reporting & Analysis makes financial data tax-friendly, which sets the context for decisions by enabling tax departments to:

- Produce analytical reports for multiple periods, entities or jurisdictions
- Develop a framework of enhanced audit and planning reports
- Build reports for special projects, other departments or to meet specific compliance requirements
- Track changes to accounts, entities or structures over multiple tax years or data snapshots – for example, if “ABC Company” becomes “ABC New Company,” the database tracks this as one entity
- Create graphs or charts to quickly spot trends or deviations
- Port information to Microsoft® Office Excel, Office Access or other charting tools

### Easily Create Custom Reports

Reporting requirements change as quickly as business needs. Vertex Income Tax Reporting & Analysis lets you manage a variety of reporting requirements with features that enable you to:

- Reduce time spent gathering data, creating queries, and building reports
- Report on data by data set, structure, entity, chart of accounts, account balance, payment type, adjusting entries, apportionment factors, eliminations or tax destination codes (TDCs)
- Choose from over 60 pre-formatted report templates featuring commonly requested information
- Effortlessly create reports by modifying existing templates
- Create custom reports with data unique to your business needs
- Compare data by tax years or snapshot



- Define when data should be pulled for each report
- Easily extract summary data or specific detailed items, ranging from total tax and taxable income amounts, to specific state apportionment amounts

With Vertex Income Tax Reporting & Analysis you can create charts and graphs to identify trends or deviations, and establish context for tax decisions.

## Protect the Integrity of Tax Data

Vertex Income Tax Reporting & Analysis includes a database that organizes historical tax data for fast, effective reporting and analysis. The database helps tax professionals maintain tax data integrity by:

- Utilizing a reporting database separate from Vertex® Income Tax Domestic, which provides more flexibility for sharing information and retaining historical data
- Retaining an unlimited amount of history, starting as far back as 2003 Vertex income tax products – retained tax information can include any number of tax years (TY) and snapshots, such as a “TY2006 Federal Tax as Filed Snapshot,” or a “TY2006 Proposed RAR Snapshot”
- Extracting over 20,000 form and workpaper data fields from Federal and State returns

## An End-to-End Solution

Vertex Direct Tax Solutions provide end-to-end management of every stage of the income tax life cycle – from provision to estimates and extensions, returns, audit, amended returns, and planning. The fully integrated suite of applications is built on a single platform and offer flexible set-up for improved efficiency. Vertex takes tax functionality to the next level with general ledger integration, seamless data flow, built-in tax logic, and automated calculation.

## Vertex Income Tax Solutions Include:

- Vertex® Provision
- Vertex® Income Tax Domestic
- Vertex® Income Tax International
- Vertex® Workflow Manager
- Vertex® Document Manager
- Vertex® Data Collect
- Vertex® Tax Calendar
- Vertex® Income Tax Reporting and Analysis

## A Proven Provider

For businesses that want more effective technology solutions, Vertex provides a comprehensive suite of software and services backed by more than 30 years experience. Our innovative solutions help companies worldwide streamline tax management in every major line of business tax including income tax, transaction tax, and payroll tax.

To learn how Vertex Income Tax Reporting & Analysis can improve your organization’s income tax process, contact a Vertex representative at **800.355.3500** or visit **vertexinc.com**.

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