VERTEX Certified Professional

Program Guide

Vertex® Indirect Tax *O Series*®
North America - Sales Tax Version 7.x

Copyright and legal notices

Copyright © 2018 Vertex Global Tax Solutions Ireland Holdings. All rights reserved.

This documentation may not be reproduced, displayed, distributed, modified, posted, republished, or transmitted in any form or by any means, without the prior written consent of Vertex Global Tax Solutions Ireland Holdings or its affiliates (collectively, “Vertex”), except as otherwise specified in a valid, current Vertex license agreement or allowed by law.

Disclaimers

The information contained in this documentation is designed to help users in regard to the subject matter covered. Some of it may be based upon interpretations of federal, state, foreign and other tax laws and regulations. Each entity is responsible for making its own determination of how such laws and regulations apply to its own circumstances and for evaluating the capabilities of, and all data and results generated by, any product that is described in this documentation. Vertex is not engaged in providing legal, tax or accounting advice or services and the information contained in this documentation or in any product cannot replace the advice of competent legal counsel. Further, the information in this documentation is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

Trademarks and Service Marks

The trademarks, logos and service marks ("marks") displayed in this documentation are the property of Vertex or other third parties. Users are not permitted to use these marks without the prior written consent of Vertex or the third party that may own the mark.

Third Party Products

Copies of the licenses for some third-party products included with a Vertex product may be found in or with the installation materials for that product.

Vertex Certified Training Program
Indirect Tax O Series® North America - Sales Tax Version 7.x

Overview
Welcome to the Vertex Certified training program! During this program, you will have access to a curriculum of courseware designed to teach you everything you need to know about Vertex Indirect Tax O Series 7.x for sales tax in North America. The courseware includes both a series of self-paced e-learning modules as well as scheduled virtual classes. Additionally, you will be given the opportunity to validate what you have learned via the knowledge and performance examinations.

Program Enhancements for 7.x
Based on feedback and to align with certification program best practices, many enhancements were made for 7.x. These include:

- ***A single, comprehensive curriculum***
  Prior versions of this certification offered separate curriculum tracks. Based on candidate feedback, we streamlined the 7.x certification. This resulted in a single, comprehensive curriculum that is more applicable to a wider variety of job roles. To accommodate this, some courses that are very role-specific are now optional. Since this is a functional user certification, these optional courses are the technical courses that are not typically expected of those in a functional tax role.
- ***Courses updated for 7.x***
- ***Accelerated upgrade path for those currently certified on a prior version of O Series***

Program Level
Advanced

Prerequisites
The following prerequisites apply to *both* the Foundation and Advanced certification tracks.

To complete the Vertex Certified training program, you should have:

- Working knowledge of sales and use tax concepts; real-world experience in a related role is recommended, but not required (see Intended Audience below)
- Familiarity with your company's tax reporting requirements
- Experience with Windows-based navigation
- Experience with learning in an online format and comfort with working in a self-directed manner(recommended)

Intended Audience

The intended audience for this certification includes Tax or IT professionals who need to demonstrate thorough knowledge of and competency with using Vertex O Series as part of their job function. Participants should ideally have one to two years' prior sales and use tax compliance industry experience and a working knowledge of sales and use tax concepts prior to beginning the program.

Benefits

Benefits of certification include the following:

- Recognition in the Vertex community as a proven tax professional
- Use of the Vertex Certified logos to promote your new designation
- Vertex training discounts - receive a 10% discount on additional Vertex training
- Custom entry in the Vertex Certified Directory on the Vertex Web site

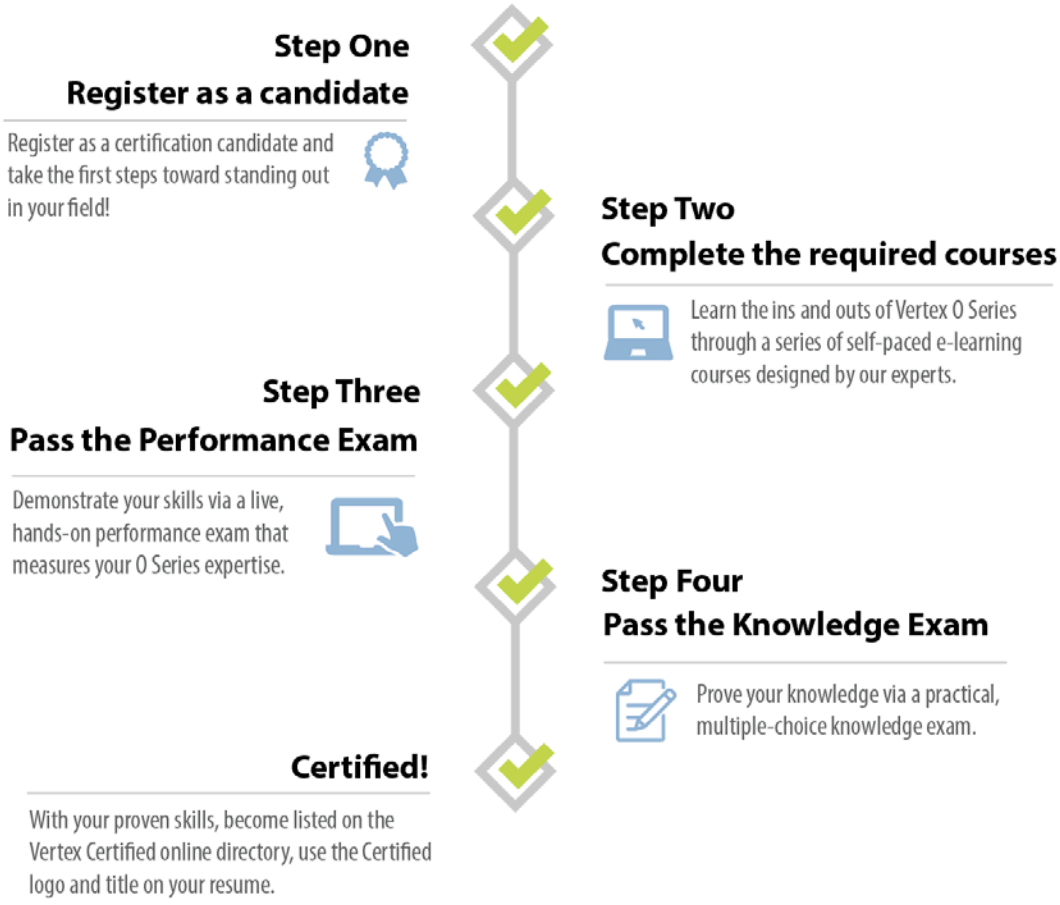
Technical Requirements

To participate in the Vertex Certified training program, you will need a desktop computer that meets the minimum system requirements. You do *not* need to have the Vertex software installed on your computer to be able to participate. For virtual classes, you will also need a phone. Please use the table below as a guide to the hardware and software requirements.

Item	Minimum or Recommended Requirements
Supported Browsers	Desktop* computer with one of the following browsers: • Internet Explorer (version 11 or higher) • Mozilla Firefox (current version) • Safari (current version) • Google Chrome (current version) *Note that, at this time, while some courses may be accessible via mobile device, this is not supported.*
Hardware	
Display	• Minimum 1280 x 720 screen resolution
Other	
Plug-ins	• Latest version of Adobe Flash Player; get the latest version at http://get.adobe.com/flashplayer
Minimum Bandwidth	• Broadband internet required
Pop-up blockers	You may need to disable pop-up blockers to view certain types of content. Instructions for how to do this can be found via an Internet search or by contacting your browser's Support.

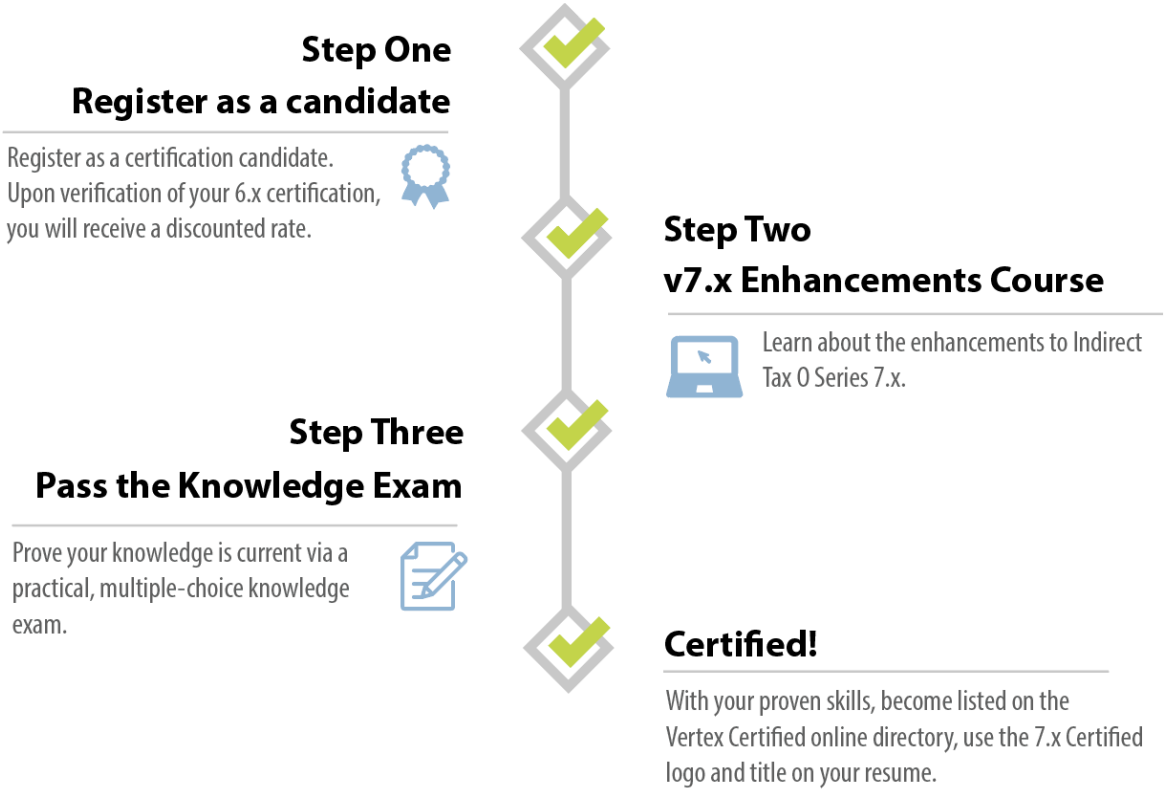
Steps to Become Certified

To become a certified, you must register as a candidate for the certification, complete the required course curriculum, pass a performance examination, and pass the knowledge examination.



Previously Certified?

We offer an accelerated path for upgrade candidates to certify on the current version. Upgrade candidates can achieve 7.x certification by completing the following requirements. Note that the complete learning curriculum is available to you to prepare for the exam, but completing it is not required.



Steps to Certification for those Currently Certified on O Series 6.x

1. Register as an upgrade candidate.
2. Complete the required course, “Vertex Indirect Tax O Series 7.x: North American Sales Tax Enhancements” to learn what’s new for version 7.x.
3. Pass the Knowledge Examination.

Certification Course Listing

The courses included in the certification curriculum are listed below. Details on each course can be found in the pages that follow in the *Course Details* tables.

Certification Curriculum

1. Orientation
2. Foundation
3. Taxability Management Planning & Tools
4. Essential Setup
5. Complex Scenarios
6. Tax Assist
7. Essential Data Management
8. Data Update
9. Reporting Options
10. Exemption Certificate Manager (ECM)
11. Vertex Indirect Tax O Series 7.x: North American Sales Tax Enhancements
12. Performance Exam
13. Knowledge Exam

Optional Advanced Courses (Completion of these courses is not required)

1. Installation & Configuration
2. Interfacing Vertex O Series with a Financial System
3. System Administration
4. Tax Data Import & Export
5. Advanced Data Management

Required Course Details

Details for each required course in the certification curriculum are outlined in the following tables. To achieve certification, candidates must successfully complete these courses.

1. Orientation				
Delivery	**Description**	**Objectives**	**CPE Credits**	**Tested?**
Self-Paced	Describe Vertex Certified for Vertex Indirect O Series 7.x	▪ Explain the Vertex Certified training program ▪ Identify the Vertex O Series for Tax Professionals v7.x certification requirements ▪ Identify prerequisite knowledge and skills ▪ Identify the benefits of certification ▪ Identify resources available for assistance	No	No

2. Foundation				
Delivery	**Description**	**Objectives**	**CPE Credits**	**Tested?**
Self-Paced	Describe the Vertex O Series solution and identify key features	▪ Describe the product solutions available for Vertex O Series ▪ Identify how Vertex O Series allows you to increase efficiencies and decrease audit exposure ▪ Explain how the features and functionality work together to provide a tax solution ▪ Identify, at a high level, the flow of data between the financial application and Vertex O Series	1	Yes

3. Taxability Management Planning & Tools				
Delivery	**Description**	**Objectives**	**CPE Credits**	**Tested?**
Self-Paced	Describe the role of planning then develop and execute a taxability strategy for implementation and ongoing maintenance	▪ Recognize the critical role that planning plays in leveraging the full power of Vertex O Series ▪ Describe best practices for developing a robust taxability strategy ▪ Identify and utilize resources to develop and execute the strategy ▪ Determine criteria for defining Business Event and As Of Date ▪ Determine when to create taxpayers, customers, certificates, taxability drivers and taxability mappings ▪ Determine when to create taxability categories, flexible fields, tax rules, and tax assist rules ▪ Explain the importance of Tax Area IDs ▪ Use the Vertex O Series tools: Rate Lookup, Tax Area Lookup, and Taxability Analysis	5	Yes

Required Course Details (continued)

4. Essential Setup				
Delivery	**Description**	**Objectives**	**CPE Credits**	**Tested?**
Self-Paced	Use the My Enterprise menu to tailor Vertex O Series to meet tax reporting requirements	▪ Apply a robust taxability strategy to leverage Vertex O Series ▪ Define Business Event and As Of Date ▪ Create taxpayers, customers, certificates, taxability drivers and taxability mappings ▪ Use Vertex O Series tools to ensure correct data setup for accurate tax calculations	4	Yes

5. Complex Scenarios				
Delivery	**Description**	**Objectives**	**CPE Credits**	**Tested?**
Self-Paced	Use the Tax Setup menu to tailor Vertex O Series to meet tax reporting requirements	▪ Apply a robust taxability strategy to leverage Vertex O Series ▪ Create taxability categories, flexible fields, tax rules, basis rules, impositions and change situs rules ▪ Use Vertex O Series Tools to ensure correct data setup for accurate tax calculations	6	Yes

6. Tax Assist				
Delivery	**Description**	**Objectives**	**CPE Credits**	**Tested?**
Self-Paced	Use Tax Assist to easily create data transformation rules in Vertex O Series rather than in your financial system	▪ Determine when and how to create Tax Assist Pre- and Post- Calculation Rules, Lookup Tables and Allocation Tables ▪ Use Vertex O Series Tools to ensure correct data setup for accurate tax calculations	3	Yes

7. Essential Data Management				
Delivery	**Description**	**Objectives**	**CPE Credits**	**Tested?**
Self-Paced	Describe essential processes and perform tasks and that deal with data management and automation	▪ Compare, contrast and perform Tax Journal Export, Tax Journal Purge, and Reporting Purge processes; troubleshoot errors and describe best practices ▪ Determine criteria and generate a Returns Export file; troubleshoot messages and errors ▪ Interpret Task Log information ▪ Describe Filter List information ▪ Schedule filters to automate Data Management tasks	2	Yes

Required Course Details (continued)

8. Data Update				
Delivery	**Description**	**Objectives**	**CPE Credits**	**Tested?**
Self-Paced	Apply the Vertex Monthly Update File and explain related reports	▪ Perform a monthly update and describe resolution steps for messages and errors ▪ Access and interpret monthly update reports ▪ Describe the Data Update History utility	1	Yes

9. Reporting Options				
Delivery	**Description**	**Objectives**	**CPE Credits**	**Tested?**
Live Web Class	Describe and use the three tools available to access and report on calculation result and tax setup data	▪ Identify the available reporting options ▪ Generate Standard Vertex O Series reports ▪ Create and run Data Extracts in Vertex O Series ▪ Identify the purpose of Vertex® Indirect Tax Reporting & Analysis	3	Yes

10. Exemption Certificate Manager (ECM)				
Delivery	**Description**	**Objectives**	**CPE Credits**	**Tested?**
Live Web Class	Set up and use ECM to manage certificate data, images and correspondence	▪ Describe the purpose and premise of Exemption Certificate Manager (ECM) ▪ Explain configuration file and preference settings which support ECM ▪ Setup ECM data ▪ Perform certificate validation ▪ Create reminder letters ▪ Attach certificate images	4	Yes

11. Vertex Indirect Tax O Series 7.x: North American Sales Tax Enhancements				
Delivery	**Description**	**Objectives**	**CPE Credits**	**Tested?**
Self-Paced	Lists the enhancements to O Series 7.x	▪ Discuss the major changes and enhancements for North America Sales Tax O Series 7.x	0	Yes

12. Performance Examination		
Activity	**Description**	**CPE Credits**
Live Web Session	A practical exam, in which you must perform a series of steps in the application in order to answer the questions or complete a scenario.	No

13. Knowledge Examination		
Activity	**Description**	**CPE Credits**
Self-Paced	A knowledge-based exam to test concepts you have learned.	No

Optional Advanced Topics/Course Details

Details for each of the optional advanced topics/courses available as part of the certification curriculum are outlined in the following tables. Completion of these additional, specialized courses are not required to achieve certification.

1. Installation & Configuration				
Delivery	**Description**	**Objectives**	**CPE Credits**	**Tested?**
Self-Paced	Perform basic Vertex O Series installation and initial configuration	▪ State environment prerequisites ▪ Perform a basic Vertex O Series installation ▪ Perform essential Vertex O Series configuration	3	Yes

2. Interfacing with a Financial System				
Delivery	**Description**	**Objectives**	**CPE Credits**	**Tested?**
Self-Paced	Describe general steps and best practices for interfacing Vertex O Series with your financial application	▪ Describe general steps to interface with Vertex O Series using web services, Batch Client Configurator and Java ▪ Use system documentation to determine relevant input and output elements for each transaction type ▪ Explain integration best practices	2	Yes

3. System Administration				
Delivery	**Description**	**Objectives**	**CPE Credits**	**Tested?**
Self-Paced	Use Vertex O Series tools to manage security, administration and configuration settings	▪ Determine criteria for and create security users, roles, and partitions ▪ Filter Activity Log data and generate reports ▪ Access and email log files; interpret basic log file data ▪ Describe and apply all types of preferences settings ▪ Create and interpret the License Report ▪ Access and email the About file; relate key elements to troubleshooting techniques ▪ Explain the impact of key configuration file parameter settings	2	Yes

4. Tax Data Import & Export				
Delivery	**Description**	**Objectives**	**CPE Credits**	**Tested?**
Self-Paced	Use Tax Data Import and Export to expedite implementation and maintenance of taxability setup data	▪ Perform tax data export and import; troubleshoot errors and describe best practices. ▪ Use system documentation to create a tax data import file	3	Yes

Optional Advanced Topics/Course Details (continued)

5. Advanced Data Management				
Delivery	**Description**	**Objectives**	**CPE Credits**	**Tested?**
Self-Paced	Describe processes and perform tasks and that deal with data management, validation and automation	▪ Perform VIES Validation and resolve messages or errors ▪ Describe the Certificate Validation and TDM Certificate Export utilities ▪ Describe the Remote Site Update utility and error resolution ▪ Compare, contrast and perform Tax Journal Export, Tax Journal Purge, and Reporting Purge processes; troubleshoot errors and describe best practices ▪ Determine criteria and generate a Returns Export file; troubleshoot messages and errors ▪ Interpret Task Log information ▪ Describe Filter List information ▪ Schedule filters to automate Data Management tasks	2	Yes

Additional Information

Recommended Completion Time for Vertex Certification

We generally recommend that learners complete each certification track within six months to one year of enrollment date. We have found that learners who complete the program within this time frame tend to stick with the program and get the most out of it.

Required Completion Time for CPE Credits

Please note that if you are interested in obtaining CPE credits for the courses completed as part of the Vertex Certified program, each course (and its associated learning review exam) **must be completed** within one year of purchase/start date to qualify for CPE credits.

CPE Certificates

The courses in the curriculum are eligible for CPE credits as outlined in the course details section; the self-directed projects and exams are not. As you complete your courses, your CPE certificates will be issued. Please allow 4-6 weeks for processing.

Contact Information

For questions about the Vertex Certified training program, or for more information regarding administrative policies such as refunds, cancellations and complaints, please contact us at certificationcoach@vertexinc.com or at the one of the following numbers:

Toll free: 1.877.455.2645 or 1.800.355.3500
International: 469.759.7758

We wish you success in completing the Vertex Certified training program, and thank you once again for your participation!

About Vertex

Founded in 1978, Vertex Inc. is the leading provider of corporate tax software and services for companies of all sizes, from small to medium-sized businesses to global multinationals.

Vertex solutions enable companies to realize the full strategic potential of the corporate tax function. The company offers a variety of products and services that allow businesses to automate, integrate, and streamline their corporate tax processes. Vertex provides solutions in every major line of tax including income, sales and consumer use, value added and payroll. Vertex also offers tailored solutions for specific industries including retail, communications, hospitality and leasing. Vertex Managed Services allows companies to outsource sales and use tax returns and exemption certificate management.

vertexinc.com

Vertex Inc.
2301 Renaissance Blvd.
King of Prussia, PA 19406
United States
Phone: 610.640.4200
Toll-free: 800.355.3500
Fax: 610.640.5892

Vertex Global Tax Solutions, LTD
30 Furnival Street, 3rd Floor
London, EC4A 1JQ
United Kingdom
Phone: +44 (0) 20 3906 7630
Reg. in England and Wales. Reg. No. 5982877

Vertex Global Tax Solutions, Brasil Ltda.
Av. Dr. Chucri Zaidan, 940
16º andar – Market Place Tower II
04583-906 – São Paulo – Brazil
Phone: +55 11 5095.3433

VERTEX
Where taxation meets innovation

©2018 Vertex Inc. All rights reserved. Vertex, the Vertex logo, and Where taxation meets innovation are all trademarks of Vertex Inc. All other trademarks are used for identification purposes only and are properties of their respective owners.