

Vertex Cloud Data Integrity



Minimize Risk and Audit Penalties

Preparing high volumes of source system data for the tax compliance process is time-consuming and leaves room for error. Moreover, in certain countries and geographies, regulation is forcing reduced turnaround times, intensifying these issues. How can your company improve tax data quality and provide an audit trail to confidently approach indirect tax compliance?

The Most Trusted Name in Tax

Vertex provides a cloud-based, tax-specific solution for the automation of the data validation, analysis and transformation steps that are required for a company to properly support their indirect tax compliance process. Vertex Cloud Data Integrity increases tax return data quality so that companies can reduce their audit risk and increase tax staff efficiency.

Challenges of the Indirect Tax Compliance Process



Error-prone manual processes create risk with real costs such as fines and lack of recoverability



Laborious manual processes are inefficient



Recurring master data errors



Lack of transparency in data corrections and audit support

Benefits of Vertex Cloud Data Integrity

Vertex Cloud Data Integrity is a powerful, best-in-class tool that empowers you and your business to improve your tax data quality and confidently approach indirect tax compliance.

- + **Increases data accuracy** and **provides an audit log** reducing the risk of audit penalties
- + **Empowers tax staff** with sophisticated validation, enrichment and transformation capabilities, through a simple tax-specific UI
- + **Increases staff efficiency** and **minimizes time** to validate all required tax data, through an automated rule-based approach
- + **Gives insight into recurring errors** so that they can be eliminated in the source system
- + **Minimizes tax obligations** by reducing overpayments in sales and use tax, or maximizing VAT reimbursements
- + **Maximizes business agility** through a cloud-based, scalable solution

“In industries where regulations govern relationships or trade with certain customers, especially in finance, maintaining good-quality data can be the difference between compliance and millions of dollars in fines. Compliance must be an ongoing focus as new regulations continue to evolve in regions around the world and wherever a company conducts business.”

Forbes Insights Report - “The Data Differentiator: How Improving Data Quality Improves Business”

Features of Vertex Cloud Data Integrity

- + **Simple, easy to use UI**
 - + Cloud-based, modern, designed for tax professionals
- + **Rule-Based Approach**
 - + Supplied rules for common scenarios (data completeness, logical checks, destination validations)
 - + Create your own rules
 - + Rule previews for simple rule creation
 - + Lookup tables to expand rule reach
 - + Flexible outcomes for rules (review, auto correct, mass correct, ad-hoc corrections)
- + **Data Validation**
 - + Single page view for easy data analysis, review and correction
 - + In-line edits for ad-hoc data repair
 - + Flexible correction outcomes (correction, mark as ok, remove transaction)
 - + File status for simple workflow creation
- + **Audit Log / Audit History**
 - + Provides full transparency for all data changes made
 - + Automatically captures and documents all changes
 - + Tracks application activities by user

Product Screenshot

The screenshot displays the 'Audit History' page in the Vertex Cloud Data Integrity application. The page features a navigation sidebar on the left with options like 'My Files', 'Rule Sets', 'Rules', 'Lookup Tables', 'Audit History', and 'Help Center'. The main content area shows a table of audit events with the following columns: User Name, Timestamp, Activity, Event, Outcome, and Message. The table contains 16 rows of data, including actions like 'Rule Set Upload', 'Rule Set Delete', 'Rule Set Modify', 'Rule Set Upload', 'Lookup Upload', 'Lookup Modify', 'Lookup Manual - Mark as OK', 'Lookup Upload', 'Lookup Delete', 'Transaction Modify', 'Transaction Upload', 'Transaction Delete', 'Transaction Upload', 'Transaction Delete', and 'Transaction Manual - Mark as OK'. The interface also includes date filters for 'Start Date' and 'End Date', a 'More Filters' section, and an 'Export Filtered Results' button. At the bottom, there is a pagination control showing 'Showing 1-20 of 249 rows' and 'Set rows per page: 20'.

User Name	Timestamp	Activity	Event	Outcome	Message
M. Hammer	09/10/2019 10:45:04 AM	Rule Set	Upload	Success	User uploaded File [Name]
M. Hammer	09/10/2019 10:45:04 AM	Rule Set	Delete	Fail	User deleted File [Name]
M. Hammer	09/10/2019 10:45:04 AM	Rule Set	Modify	Success	User Exported Original File [Name]
M. Hammer	09/10/2019 10:45:04 AM	Rule Set	Upload	Fail	User Exported Corrected File [Name]
M. Hammer	09/10/2019 10:45:04 AM	Lookup	Upload	Success	User added new Rule [Name]
M. Hammer	09/10/2019 10:45:04 AM	Lookup	Modify	Success	User modified Rule [Name and ID]
M. Hammer	09/10/2019 10:45:04 AM	Lookup	Manual - Mark as OK	Fail	User added Rule Set [Name]
M. Hammer	09/10/2019 10:45:04 AM	Lookup	Upload	Success	User added Rules to Rule Set [Name]
M. Hammer	09/10/2019 10:45:04 AM	Lookup	Delete	Fail	User removed Rules from Rule Set [Name]
M. Hammer	09/10/2019 10:45:04 AM	Transaction	Modify	Success	User deleted Rule Set [Name]
M. Hammer	09/10/2019 10:45:04 AM	Transaction	Upload	Fail	User uploaded a Lookup Table [Name]
M. Hammer	09/10/2019 10:45:04 AM	Transaction	Delete	Success	User uploaded a Lookup Table [Name] Column [Column Na
M. Hammer	09/10/2019 10:45:04 AM	Transaction	Upload	Success	User appended Lookup Table [Name]
M. Hammer	09/10/2019 10:45:04 AM	Transaction	Delete	Success	User uploaded a Lookup Table [Name]
M. Hammer	09/10/2019 10:45:04 AM	Transaction	Manual - Mark as OK	Fail	User uploaded a Lookup Table [Name] Column [Column Na

What our customers are saying...

“Honestly, I think the Data Integrity product is terrific. This is a problem area for us. Our current approach is time-consuming and painful.”

Tax Manager, American business and financial software company

To learn more, visit www.vertexinc.com/solutions/products/vertex-cloud-data-integrity.

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