VERTEX®

Vertex Indirect Tax O Series

A Streamlined Solution for Global Tax Management

Vertex® Indirect Tax O Series® is the industry leading solution designed to automate and centralize indirect tax determination. Rich tax content and flexible deployment options paired with robust integrations to your financial systems provide a single platform to manage global indirect taxes including sales, use, value added, communications, leasing, and retail.

Reliable Tax Determination

Vertex Indirect Tax O Series provides a powerful tax determination solution — from determining tax jurisdictions to maintaining an accurate rate database, to calculating complex transactions. The system's robust functionality is balanced by a streamlined user interface, improving visibility and control for your tax department.

Support Business Growth

More than just accurate tax calculation, Vertex O Series gives the tax function the agility to support business growth into new markets, new products and services, and new sales channels. The system gives tax departments the robust content and powerful calculation automation to rapidly accommodate business growth and change without increasing risk. The end result is a tax department that provides higher value to the organization.

Benefits

| Reduced audit exposure | Improved compliance | Global scalability | Centralized control | Increased productivity |

Key Features

Integrated with Your Financial Systems

Vertex integrates seamlessly with your ERP, e-commerce, and other financial systems to automatically calculate tax and provide centralized control and visibility.

Robust Tax Content

Robust tax content, updated monthly, ensures the right tax on every transaction. Sales, use, and value added tax plus industry-specific content for communications* and leasing*.

System Scalability

License the tax data and capabilities you need today, then add capabilities as you expand into new markets and new businesses. Web-based access for worldwide users. Centralized control of company-specific taxability, rate research, reports, and monthly content updates.

Accurate Jurisdiction Identification

Address cleansing* and precise jurisdiction assignment including lat/long functionality* ensures the right tax for every transaction, regardless of the location.

Custom Taxability Setup

Easy set-up of your company's unique taxability rules, exemptions, and data ensures accuracy even for companies with multiple entities.

Exemption Management

Improve audit performance with integrated tools to collect, track, and store exemption certificates, plus ensure accurate exemptions for every transaction*.

Export to Returns

Increase compliance efficiency by populating summarized transaction data directly into Vertex® Indirect Tax Returns via an import file.

Reporting

Easy-to-use tools let you generate standard reports or leverage data to create custom reporting to support audit and enterprise tax management.

Deployment Options

Choose on-premise or on-demand deployment to meet your specific IT and business needs.

Security & Access

Role-based access enables you to control tax processes and data visibility. Audit logs ensure SOX compliance. Federated security enhances protection. And single sign-on (SSO) improves convenience.

To learn more, contact a Vertex representative at **1-800-355-3500** or visit **vertexinc.com.**

60%
of Fortune 500 use Vertex

* This is available with an additional license and fee.

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