VERTEX®

Vertex Cloud Indirect Tax Returns Premium

Outsource Returns to Streamline Compliance

Most businesses today are under pressure to do more with less. Combine this with increasing tax complexity, increasing audit activity, and in-house staffing constraints, and you can understand why so many companies outsource sales and use tax compliance. Executives are looking for ways to reduce the time spent on the administrative aspects of monthly compliance so they can focus staff on more strategic work.

Simple, Convenient Returns Outsourcing

Vertex® Cloud Indirect Tax Returns Premium is a SaaS solution enabling you to outsource monthly sales and use tax returns preparation, filing, and payments, but stay in control of compliance. You can offload the administrative tasks and re-focus your in-house resources on higher-value activity.

Just create your account in Vertex Cloud and identify which returns you need to submit. Then upload your tax data file each month and we handle the rest—from returns generation to filing, payments, even notice management. You'll streamline your compliance process but remain in control. (Process is SOC 1 Type 2 and SOC 2 certified.)

Efficiency
Outsourcing manual tasks, free up staff to focus on high value work.

Control
Reliable month-to-month process regardless of in-house staffing changes.

Transparency
Secure online portal stores all returns and notices.

Audit Readiness
Reliable online archive for improved audit preparation.

Scalability
Easily manage added compliance obligations without added staff.

Turnkey Solution for Monthly Compliance

Vertex offers a turnkey solution for monthly sales and use tax compliance:

1. Data Import

Upload your tax data from any financial system to the Vertex Cloud application by the first day of each month. No custom integration or connector required.

2. Returns Generation and Approval

Vertex automatically generates PDF returns from your tax data. Returns are available for review in the Vertex Cloud application until the 10th of the month. Simply review your returns and send Vertex the total tax amount due.

3. Filing and Remittance

Vertex files the returns and sends payments to individual state and local tax jurisdictions.

4. Notice Management

Vertex resolves notices from tax authorities and posts all communication in the Vertex Cloud application.

Detailed Reporting

From the Vertex Cloud application, you can access reports each month to ensure you to stay in control of the tax compliance process.

+ *Tax Calendar Report* provides a breakdown by filing entity and jurisdiction of exactly what returns are being filed for that given period. It also details net tax due and estimated funds to be transferred.
+ *Reconciliation Report* breaks down by filing entity and jurisdiction the data being used to file the returns, rounding, credits, and carry-forward amounts.

Add Tax Calculation for an End-to-End Solution

Vertex Cloud also offers sales and use tax calculation on the same cloud platform with proven integrations to industry-leading ERP, e-commerce, and procurement systems. Leverage Vertex Cloud Indirect Tax to ensure accurate tax calculation and streamlined monthly compliance.

For more information, visit **vertexinc.com** or call **1-800-355-3500**.

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