

Vertex Indirect Tax Returns – North America



Automate Returns to Streamline Compliance

Manual processing of returns is a labor-intensive effort that can strain the resources of your tax department or accounting practice. Hundreds of different forms and e-file requirements across 10,000+ jurisdictions make compliance a complex challenge with growing risk.

Save Time and Reduce Risk

Vertex® Indirect Tax Returns decreases the time and resources required for compliance by automating the creation of signature-ready returns and e-files. And the reduced manual intervention improves accuracy and reduces risk.

The application enables you to streamline compliance, manage audits more effectively, and minimize assessments freeing up time to focus on more strategic activities. Install and maintain the application on your desktop, or access a cloud-based version that's always up to date. Either way, you get the most advanced, reliable, automated solution for compliance from a trusted provider of tax content.

End-to-End Compliance Automation

Vertex Returns is a Windows® application that automates the end-to-end compliance process – from data import to returns generation to check requests and reconciliation. Monthly content updates ensure the latest forms and e-files today plus the resources you need to support business growth. And it archives all returns, schedules, and spreadsheets to improve audit performance.



Efficiency

Automate return preparation and check requests.



Accuracy

Ensure the right data is in the right spot in the latest forms and e-file formats.



Transparency

Create a clear audit trail of all tax calculations and adjustments.



Audit-Readiness

Robust reporting, rate history, and archiving to support audit management.



Scalability

Economically supports single user departments and high-volume service providers.

Key Features



Easy Setup & Data Import

Simple setup and streamlined data import from Vertex and non-Vertex tax data files reduces manual errors.



Robust Content

Access 600+ return forms and 35+ e-files for the U.S., Canada, and Puerto Rico. Specialty returns for food & beverage and business & occupation tax.



California Direct Transmission

Automated e-file preparation, transmission, ACH debit remittance, and acknowledgement receipts for California direct transmission.



User Tools

Automated workflow, calendar, and document management tools streamline processes and improve control.



Reporting

Easy-to-use tools let you generate 100+ standard reports or leverage data to create custom reporting to support audit.



Automated Payment Requests

Generate, send, and track payment requests with full general ledger coding.



Credit Management

Easily manage, apply, and report on credit balances within the application to ensure .



Deployment Options

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



Security

Role-based access enables you to control tax processes and data visibility. Audit logs ensure SOX compliance.



Ease of Use

Easy-to-use application supports tax processes without reliance on IT resources.

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

North America
King of Prussia, PA, USA

Latin America
São Paulo, BR

Europe
London, UK

Asia Pacific
Chennai, IN

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