

Vertex Indirect Tax O Series



A Streamlined Solution for Global Tax Management

Vertex® Indirect Tax O Series® is an 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 for managing global indirect taxes, including sales, use, value added, communications, leasing, and retail taxes.

Reliable Tax Determination

Vertex Indirect Tax O Series provides a powerful tax determination solution supporting everything from determining tax jurisdictions and 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

Vertex O Series goes beyond improving the accuracy of your tax calculations by giving the tax function the agility to support business growth into new markets, products and services, and sales channels. The system gives tax departments the robust content and powerful calculation automation needed to rapidly accommodate business growth and change without increasing risk. As a result, your tax department can provide 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, helps ensure that the right tax is applied to every transaction. Vertex maintains sales, use, and value added tax content plus industry-specific content for communications* and leasing*.



System Scalability

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



Accurate Jurisdiction Identification

Address cleansing* and precise jurisdiction assignment functions, (including lat/long functionality*) help ensure the right tax is charged for every transaction, regardless of the location.



Custom Taxability Setup

Enjoy vastly simpler set-up of your company's unique taxability rules, exemptions, and data. This helps ensure accuracy, even if your company has multiple entities.



Exemption Management

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



Export to Returns

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



Reporting

Tools designed for ease of use 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. Release Testing Service** available for On-Demand customers to provide functional testing of service releases prior to going live.



Security & Access

Role-based access enables you to control tax processes and data visibility more effectively. Audit logs help 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**.

>50%
of Fortune 500
use Vertex

* This is available with an additional license and fee.

** Release Testing Service available through Vertex Consulting.

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