

Vertex Indirect Tax for Retail



An Enterprise Tax Solution Tailored for Retailers

Managing tax compliance in a multi-channel environment presents many challenges. Retailers face increasingly complex jurisdictional tax laws, accommodation of special tax rates and rules, and unique compliance requirements. Couple this with pressures to support growth and expansion, mergers and acquisitions, technology upgrades, and increasing consumer demands, and retail tax management becomes a daunting task.

Vertex Indirect Tax® O Series® offers a sales, use, and value-added tax platform built to meet the specialized needs of retailers. Vertex addresses back office, eCommerce and Point-of-Sale (POS) environments. Add to that a team of knowledgeable implementation consultants, and this unique tax solution enables you to automate and centralize your tax process and improve your overall retail business.

A Streamlined Solution for Global Tax Management

Vertex O Series is deployed on a Web application server so users can access the system from any computer using any of the leading Web browsers. This enables unparalleled efficiency, control, and consistency across your organization. Vertex offers integrations for all leading ERP systems and e-commerce platforms. And with tax data content for nearly every geographic region, Vertex enables you to configure a system to meet your current market needs, and then build on that system as you expand into new markets.

Built for Multi-Channel Environments

Most retail operating infrastructures are comprised of multiple, disparate vendor systems, making tax management even more challenging. Vertex O Series is built on a scalable, Web based, service-oriented architecture that provides the flexibility to

work with any POS, e-commerce or back office system – offering seamless integration with all retail systems, whether legacy or new.

The system connects your operations supporting product sales and services, including back office, store front, e-commerce, catalog, wholesale, procurement, inventory management, and asset transfer operations.

Supports Retail-Specific Tax Needs

Many retailers battle complexities associated with multiple points of sale for diverse products and services. Vertex O Series ensures consistent, accurate tax calculation on every transaction including:

- + Deliveries or services rendered at a customer's home address
- + Send sales (in-store purchases shipped to another destination)
- + Store returns from another jurisdiction
- + Store-within-a-store merchandising (sales of various non-core product types that have diverse taxability)
- + Internet purchases returned in-store
- + Mobile purchases for in-store pickup

Vertex's unmatched research also helps you stay compliant with tax holidays, tiered taxes, threshold and compound taxes, origin and modified origin states, bracket taxes and more. And by archiving transaction results in detail using reason codes for special tax treatments, the system helps you improve overall tax compliance efficiency. As a result, you can reduce your audit exposure, as well as the need for high cash reserves to cover penalties or class action lawsuits.

Embedded Exemption Certificate Management

With embedded Exemption Certificate Management functionality, you can manage your organization's sales and use tax exemption and resale certificates right from within Vertex O Series. It's a digital solution that automates the collection, validation, and maintenance of sales and use tax exemption certificates, including automated renewal notices.

Flexible Configuration to Meet Your Needs

Vertex gives you the flexibility to choose the automation option that's best for your retail environment. Specifically, you can

- + Use rates and rules from Vertex Indirect Tax O Series with the POS System's native tax engine
- + Interface Vertex Indirect Tax O Series with the POS system either by running it in each store's infrastructure, or by making it available to each store via your network

Both options offer you field-tested technology with built-in safeguards that keep your critical operations up and running at all times. As a result, you can run a more efficient tax department.

Deployment Options

Users of Vertex Indirect Tax for Retail have the option of implementing the software on premise or accessing a hosted, on-demand version through a Web portal.

Automated Returns

Vertex® Sales & Use Tax Returns is a Windows PC application that automatically produces signature-ready sales and use tax returns for the U.S., Canada and Puerto Rico. Using data imported from Vertex O Series or another host financial application or tax calculation engine, Vertex Returns formats and prints the forms you need, including returns, schedules, worksheets, electronic return data files for eFiling and payment requests. The application supports most schedules important to retailers, recognizes sales subject to tax holidays as required by certain forms, and automatically totals information by location in states that require location reporting.

Advanced Reporting and Analytics

In addition to the standard reports available in Vertex O Series, you can generate more advanced reports with Vertex® Reporting Analysis. With this browser-based tool, you can select jurisdictions, product groups, customers or cost centers to create your own unique ad hoc reports, tables and charts to proactively detect issues before they're uncovered in an audit.

An End-To-End Solution for Retailers

Vertex Indirect Tax for Retail provides an end-to-end solution for managing tax at the enterprise level. From planning, research, taxability, and exemption management to calculation, filing and payment, reporting and audit support, Vertex Indirect Tax for Retail delivers industry-leading tax process support, research and technology. Combine this with our knowledgeable team of implementation consultants, and you gain the tools and expertise needed to deliver greater tax accuracy and consistency in your retail transactions, every day and around the world.

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King of Prussia, PA, USA

Latin America
São Paulo, BR

Europe
London, UK

Asia Pacific
Chennai, IN

