



# Vertex Cloud Indirect Tax Intelligence

## Data-driven, actionable insight to improve tax performance

Mine your Vertex tax engine and ERP data for trends, indicators, and variances so you can take action sooner to improve tax performance and mitigate risk. Turn the tax function into a source of strategic insight to help drive business decisions.

### Access data intelligence

The tax department utilizes some of the largest, most detailed, and diverse data sets in the company. Vertex offers a data intelligence tool to unlock time, capacity, and *insight* from that data to empower indirect tax departments to:

- Optimize compliance and audit performance
- Mitigate risk
- Improve tax outcomes across the business

### Get actionable insight

Vertex® Cloud Indirect Tax Intelligence combines data from the Vertex tax engine, Vertex tax research content, and your ERP systems to deliver a series of dashboards with summary views and easy drill-down capability to not only support compliance and audit, but alert users to data variances, trends, and other key risk indicators to pinpoint areas for proactive attention.

The solution is a powerful tool that enables the tax function

to be more proactive, build stronger cross-functional partnerships, and drive business performance rather than merely report on historical activity. It provides data-driven intelligence that tax executives and advisors can use to not only optimize tax performance, but model, predict, and influence decision-making to drive business growth.

### Improve tax planning

Data intelligence can access deep data-driven insight to use *immediately* to improve indirect tax planning that impacts the business sooner. It's the key to elevating the tax function to more of a strategic partner in the business.

## Benefits



Data-Driven  
Intelligence



Reduced  
Risk



Strengthened  
Audit Defense



Strategic  
Insight



Accelerated  
Growth

## Multi-stage approach

Vertex Cloud Indirect Tax Intelligence capabilities are designed to align to the evolving stages of a high-performing tax function.

- **Stage 1:** Better understand financial and tax data quality
- **Stage 2:** Improve filing and reporting outcomes
- **Stage 3:** Gain insight and drive business planning

### Stage 1: Better understand your financial and tax data quality

Stage 1 provides a series of dashboards that combine tax and financial data with Vertex tax content to monitor and analyze tax metrics, and unlock unique views of risk. With a combined view of tax data, tax professionals can more quickly identify areas for review, attention, and optimization.

Dashboards include:

- Indirect Tax Dashboard
- Nexus Risk Dashboard
- Data Accuracy Risk Dashboard
- Completeness Risk Dashboard
- Configuration Risk Dashboard
- Audit Risk Dashboard
- Overall Health and Wellness Dashboard

Initial release supports sales and use tax data from one or more instances of Vertex O Series and Vertex Cloud. Supports data from one or more instances of Oracle R12, SAP, ECC, and SAP S/4HANA. Future support will include VAT and additional ERPs.

### Stage 2: Improve your tax outcomes

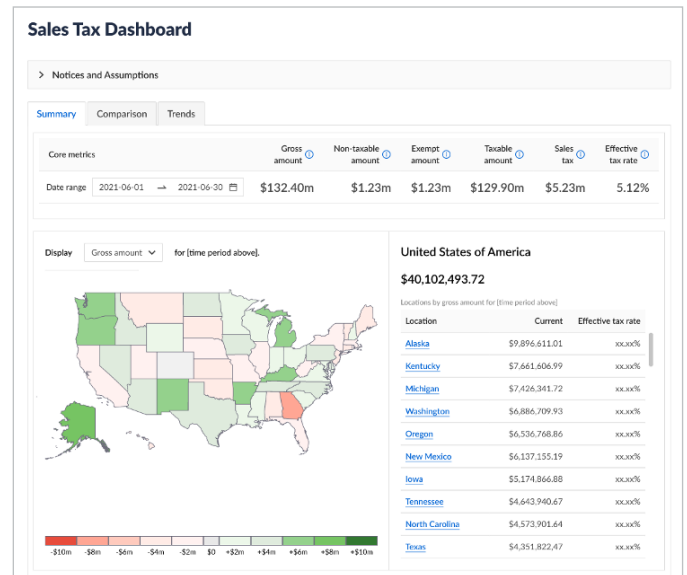
Leverage a series of dashboards in Stage 2 to utilize transactional data to better substantiate, correct, and defend compliance, and improve audit and planning outcomes.

Delivered in future release.

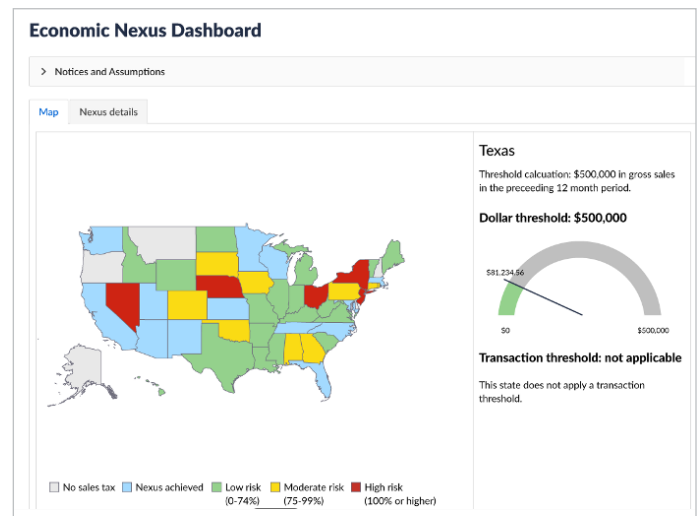
### Stage 3: Gain deeper insights to improve strategic planning and decision-making

With data quality, compliance, and audit better supported, tax professionals can leverage Stage 3 dashboards, scenario planning workflows, and data analysis tools to accelerate strategic insights and affect outcomes sooner, influence growth and innovation, and drive business decisions.

Delivered in future release.



Stage 1: Indirect Tax Dashboard lets you view tax activity to easily identify trends and variances.



Stage 1: Nexus Risk Dashboard lets you monitor progress toward state nexus thresholds to identify upcoming registration needs.

For more information, contact your Vertex sales representative or visit [vertexinc.com](https://vertexinc.com).

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