

# Vertex PDF Returns

## Simple, Convenient Automated Returns

Looking for ways to reduce the time spent on administrative monthly compliance tasks so you can refocus on more strategic work? Vertex PDF Returns is a standalone SaaS solution enabling you to automatically generate monthly sales and use tax returns. You'll spend less time on returns, and more time on strategic tax work.

### Signature-Ready PDF Returns

Vertex PDF Returns lets you automatically generate sales and use tax returns from your data file. Just upload your tax data file each month to automatically generate signature-ready PDF returns.

### Optional Filing Service

Once you generate PDF returns, choose the level of service you need:

- You can sign/file the returns and remit payments yourself,
- Or add an optional service where Vertex handles the filing and remittance to all required jurisdictions. We'll even respond to notices on your behalf.

### Benefits

- Increase accuracy and reduce risk by eliminating manual errors.
- Improve efficiency by speeding up manual compliance tasks.
- Streamline audit preparation with easy online access to returns and reports.
- Ensure security with a SOC-certified process.
- Add scalability by automating and standardizing processes.
- Extend the convenience by adding the optional filing and payment service

## Features



### Data Import

When you're ready to generate returns, upload your tax data from any financial system to the Vertex application. No custom integration or connector required.



### PDF Returns Generation

Vertex automatically generates PDF returns from the imported tax data. Just sign and file, or add the optional filing and payment service to streamline the whole end-to-end compliance process.



### Filing, Remittance, Notice Management

Add the optional service for returns filing, remittance, and notice management to free up even more time. Just send us the amount due each month, we'll handle all the filings, remittances, and notices.



### Detailed Reporting

Access monthly reports to ensure you 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



### Data Security

The SOC 1 Type 2 and SOC 2 certified process ensures the security of your financial data.



### Audit Readiness

All returns are archived in the application for fast access and streamlined audit preparation.

## About Vertex

**Vertex Inc.**, is a leading global provider of indirect tax software and solutions. The company's mission is to deliver the most trusted tax technology enabling global businesses to transact, comply, and grow with confidence. Vertex provides solutions that can be tailored to specific industries for major lines of indirect tax, including sales and consumer use, value added, and payroll. Headquartered in North America, and with offices in South America and Europe, Vertex employs over 1,200 professionals and serves companies across the globe.

To learn more, visit [VertexInc.com](https://VertexInc.com).



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