VERTEX®

Vertex Certificate Center

Reduce Audit Penalties and Improve Compliance

As sales taxability regulations continue to change and transaction volumes increase, managing sales tax exemption certificates without an automated solution can be an error-prone manual process. Vertex® Certificate Center automates and simplifies the end-to-end exemption certificate process to streamline internal processes, facilitate correct tax exempt calculation, and reduce audit exposure.

Exemption Certificate Management Made Simple

Vertex Certificate Center automates the time-consuming and labor-intensive processes of exemption certificate management. It's a cloud-based paperless solution that electronically stores and tracks sales tax exemption certificates.

End to End Automation

The Certificate Center offers an end-to-end solution from collection, validation, storage, and maintenance to audit reporting and tax-exempt calculations.

Improve Tax Department Efficiency

With automated workflows, centralized storage, flexible tracking tools, and 24/7 access in the cloud, the Certificate Center improves efficiency to unlock time for the tax staff to focus on higher value work.

Elevate Your Customer Experience

Accurate exemption management not only affects audit performance, it impacts your customer satisfaction. With the Certificate Center, you'll not only provide your customers with easy certificate submission tools but you'll increase your tax accuracy and consistency.
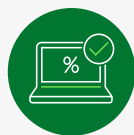
Increase Tax Accuracy and Reduce Audit Risk

Manually storing, retrieving, and monitoring expiration dates increases the risk of errors, as well as penalties and fines during tax audits. With an automated solution you'll improve tax accuracy at the time of the transaction, accelerate audit response, and reduce audit exposure.
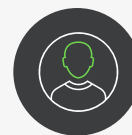
Benefits

Streamlined Automated Processes

Increased Tax Accuracy

Improved Reporting & Reduced Audit Risk

Customer Satisfaction

Features

Self-Service Exemption Certificate Submission

Offer your customers a self-service, self-guided online tool where they can create and submit audit-ready certificates directly into your Vertex tax engine. *(See Exemption Certificate Wizard next page.)*

Streamlined Certificate Renewals

Set up continual monitoring of certificate expiration dates. Run a report of expiring certificates and generate email requests for new certificates.

Tracking and Reporting

Multiple sorting features provide easy access to certificates. View certificates nearing expiration to move into renewal campaign. Respond more timely and completely to audit requests.

Tax-Exempt Calculations

Seamless integration with the Vertex tax engine improves tax accuracy for tax exempt transactions.

Master Data Coordination

Synchronization of certificates, customers, and taxpayers with the Vertex tax engine helps ensure master data is always up to date to minimize disputes, credits, and changes to transactions.

Cloud Access

Cloud access eliminates the need for IT infrastructure and support. 24/7 availability maximizes tax staff productivity.

Certificate Library

Continually updated library of exemption and resale certificates by jurisdiction (state and local). Supports multi-jurisdiction certificates, Direct Pay Permit management, and storage of customer billing and shipping information. Supports Single Use Certificates (by invoice number), Product or usage based, and Blanket Certificates.

End to End Cloud Solution

Leverage a common user interface across end-to-end tax applications on the Vertex Cloud platform -- from tax determination to compliance and data management.

Vertex Certificate Center offers an end-to-end solution from collection, validation, storage, and maintenance, to audit reporting for tax exempt transactions.

Exemption Certificate Wizard

Self-Service Certificate Submission for your Customers

The Vertex Certificate Center allows companies to deploy the Exemption Certificate Wizard, a self-service web-based tool that enables their customers to create and submit new certificates directly to your Vertex system right from their computer or smart phone. From a website or e-commerce portal, buyers simply follow a series of guided questions, then the Wizard determines the certificates needed, populates them, and submits them directly into the Vertex Certificate Center.

Benefits

- Supports an end-to-end process – from customer submission to exempt transactions
- Reduces certificate errors and improves audit performance
- Helps companies reduce audit reserves
- Streamlines internal tax processes
- Accelerates commerce

Features

Self-Guided

Built-in logic guides the buyer through a series of questions about their business, locations, reason for exemption, and the purchase transaction.

Identify. Create. Submit.

Based on the information submitted, the Wizard identifies which certificate(s) are required, populates the audit-ready certificate(s), captures an electronic signature, and with one click it submits the certificate(s) directly to Vertex.

Multi-Certificate Questions

Where multiple certificates are required, the tool presents a single set of questions to create multiple certificates to streamline the customer experience.

Electronic Signature

Electronic signature capability ensures all certificates are audit-ready.

SaaS Simplicity

The SaaS solution can be deployed on your website or e-commerce platform. And automatic data updates ensure the latest exemption certificate rules and forms.

A simple, clean UI guides users through a series of questions to create, sign, and submit the required certificate(s).

To learn more, visit VertexInc.com.

North America | **Latin America** | **Europe** | **Asia Pacific**

VERTEX

VertexInc.com