VERTEX®

Vertex Invoice IQ

Automated tax-compliant digital invoicing to streamline global commerce and improve business scalability

Vertex offers an API-based solution for digital invoicing that supports the complex requirements of buyers across 60+ countries. Sellers can expand their business to additional regions without additional effort to manage invoice requirements.

Managing the complex invoicing regulations for cross-border transactions is challenging. B2C and B2B sellers must follow the unique invoicing requirements of each buyer's local tax authority. Keeping up to date with those changing invoice rules in every country is labor intensive, increases audit risk, and can impact customer satisfaction.

Flexible, Global Solution

Vertex Invoice IQ is an API-based solution that maintains the latest invoicing requirements of 60+ countries to support digital invoicing however/wherever a merchant sells (ecommerce, retail, omnichannel). It integrates with a seller's workflow and platforms to automatically generate tax-compliant invoices for digital services based on buyer location— regardless of country, jurisdiction, language, or tax regime.

In addition to presenting the required invoice data requirements of the buyer's local jurisdiction, the solution fully supports complex localization of currency and language, as well as signatory and audit requirements to ensure compliance with international invoicing regulations.
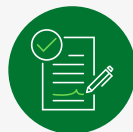
Integration Options

The flexible design enables the user to define how the solution operates and where it's integrated – with e-commerce platforms for online sales, or with ERP and CRM platforms for offline sales. Businesses can even design their invoice layout to meet their brand/logo standards.
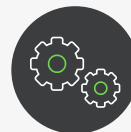
Benefits

| Streamlined Process | Local Compliance | Reduced Audit Risk | Scalability | Easy Integration |

Features

Automated Invoice Generation

Automated tax-compliant digital invoice creation in the seller's platform. Invoice is generated based on the transaction data and buyer location to comply with local requirements.

Local Currency

Supports foreign currency conversion requirements for 60+ countries. The solution is integrated with the correct FX source for each country as stipulated by the local tax authority to display sale amounts in both seller and buyer currency.

Language Localization

Generates invoices in the local language of the buyer to fully comply with language localization where required by tax authorities, with support of 13+ languages.

Compliant B2B Invoices

Sale type is identified, and invoice includes the required B2B buyer details (i.e., business registration number, address, description of sale).

B2B Reverse Charge Mechanism

Where the reverse charge mechanism is applied in a sale, the invoice includes a specific piece of text to identify this tax treatment to comply with local tax authority stipulations.

Sequential & Unique Numbering

Automatically applies sequential and unique invoice numbering per country so that the seller does not need to manage multiple numbering schemes, and to support auditing purposes.

Compliant Credit Notes

Generates tax compliant credit notes that link back to the original sale and invoice. Pro-rated/partial refunds supported.

Signatories

Supports the inclusion of signatures from both an authorized seller and a local tax agent, where required.

Invoice Delivery Options

Choose from multiple invoice delivery options: Email buyer a link to invoice (HTML or PDF download), embed invoice in email body, or pull invoice into seller's system.

Invoice Storage

Stores an unlimited number of invoices up to the stipulated regulatory timeframes to simplify and support audit management.

Integration Options

The API-based solution provides flexibility to embed tax-compliant invoicing automation in the correct place in your sales workflow (i.e., e-commerce, ERP, and CRM platforms) to meet your needs.

To learn more, visit VertexInc.com.

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