# VERTEX® + zuora

# Vertex and Zuora

## Sales Tax and Value Added Tax Determination

## Improve tax determination with Vertex

Vertex provides powerful, automated tax determination for the Zuora subscription billing process. A seamless integration enables location identification as well as complex taxability logic to deliver a precise tax calculation for every transaction. Integrating a Vertex tax engine ensures the latest tax content with reduced system update requirements.

### Robust Integration

Vertex offers Zuora integrations to Vertex O Series and Vertex Advantage tax solutions. The Vertex tax engine simplifies the management of tax determination for even the most complex scenarios. This reduces the burden on your finance, tax, and technology teams, while increasing usability for reporting and returns, and reducing audit risk and exposure.

After integrating to Vertex, Zuora users will no longer need to rely on manual processes to update rates or apply the correct tax rates to invoices. One call to the Vertex API ensures the latest rates and rules are applied to orders – around the globe – saving time and resources by avoiding manual tax content updates and maintenance headaches.

### Our Partnership

A trusted Zuora partner, Vertex continues to develop and deliver innovative tax solutions to help customers extend the value of their subscription billing platform investment, streamline tax determination and compliance, and accelerate business growth.

### Powerful Benefits

Extend the value of the Zuora system.

Improved ROI and faster time-to-value for the Vertex tax engine.

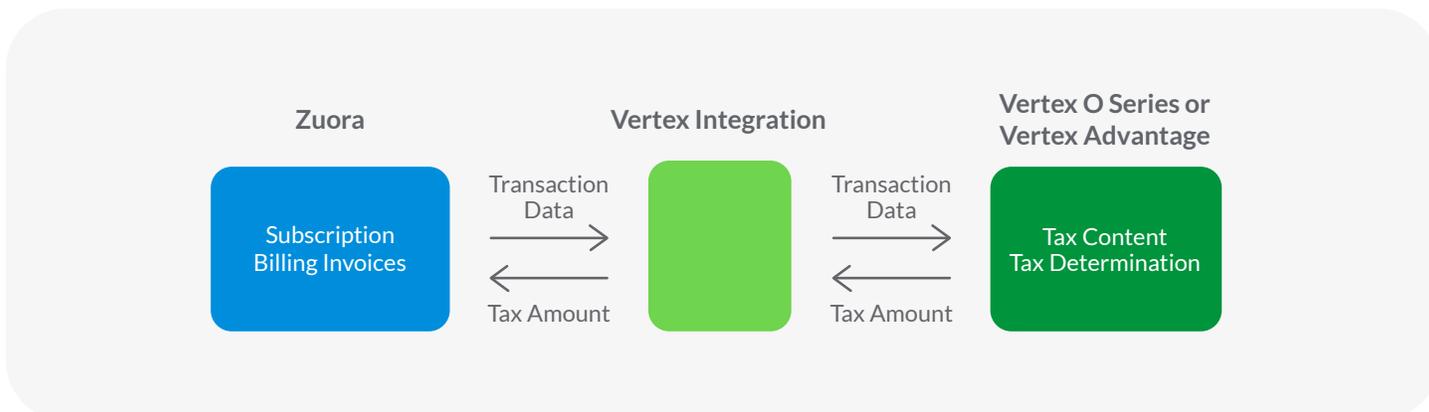Increased efficiency of Finance, Tax, and IT teams.

Improved scalability.

Backed by a global Vertex team of knowledgeable implementation consultants and support specialists.

# Tax Determination for Zuora

**Zuora**

Subscription Billing Invoices

**Vertex Integration**

Transaction Data →

← Tax Amount

Transaction Data →

← Tax Amount

**Vertex O Series or Vertex Advantage**

Tax Content Tax Determination

*Vertex pulls the transaction details from Zuora to calculate tax in Vertex O Series and send that tax amount back to Zuora.*

## A Global Solution

**Leverage the industry-leading global solution to improve tax accuracy, reduce audit risk, and enable business scalability.**

- Robust global tax content including 300 million+ data-driven tax rules
- Custom taxability setup
- Address cleansing for accurate tax jurisdiction identification
- Reporting and data extracts
- Role-based security
- System scalability
- Business tax ID validation during e-commerce checkout
- Foreign currency conversion during ecommerce checkout and invoicing
- Tax-compliant digital invoice creation during e-commerce checkout on Digital Services

## 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 1,300 professionals and serves companies across the globe.

**40+**
Years in Tax Technology

**130+**
Countries Supported

**4,500+**
Customers

**>59%**
of the Fortune 500

To learn more, visit VertexInc.com.

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