

Vertex O Series for Retail

An Enterprise Tax Solution Tailored for Retailers

Managing tax compliance in a multi-channel environment presents many challenges. Retailers face increasingly complex jurisdictional tax laws, accommodation of special tax rates and rules, and unique compliance requirements. Couple this with pressures to support growth and expansion, mergers and acquisitions, technology upgrades, and increasing consumer demands, and retail tax management becomes a daunting task.

Vertex O Series for Retail offers a sales, use, and value-added tax platform built to meet the specialized needs of retailers. Vertex addresses back office, eCommerce and Point-of-Sale (POS) environments. Add to that a team of knowledgeable implementation consultants, and this unique tax solution enables you to automate and centralize your tax process and improve your overall retail business.

Built for Multi-Channel Environments

Most retail operating infrastructures are comprised of multiple, disparate vendor systems, making tax management even more challenging. Vertex O Series is built on a scalable, Web based, service-oriented architecture that provides the flexibility to work with any POS, e-commerce or back office system – offering seamless integration with all retail systems, whether legacy or new. The system connects your operations supporting product sales and services, including back office, store front, e-commerce, catalog, wholesale, procurement, inventory management, and asset transfer operations.

Supports Retail-Specific Tax Needs

Many retailers battle complexities associated with multiple points of sale for diverse products and services. Vertex offers consistent tax calculation on transactions including:

- Deliveries or services rendered at a customer's home address
- Send sales (in-store purchases shipped to another destination)
- Store returns from another jurisdiction
- Store-within-a-store merchandising (sales of various non-core product types that have diverse taxability)
- Internet purchases returned in-store
- Mobile purchases for in-store pickup

Vertex's unmatched research also helps you stay compliant with tax holidays, tiered taxes, threshold and compound taxes, origin and modified origin states, bracket taxes and more. And by archiving transaction results in detail using reason codes for special tax treatments, the system helps you improve overall tax compliance efficiency.

Benefits



Reduced audit exposure



Improved compliance



Global scalability



Centralized control



Increased productivity

Flexible Configuration to Meet Your Needs

Vertex gives you the flexibility to choose the automation option that's best for your retail environment.

Specifically, you can:

- Use rates and rules from Vertex O Series with the POS System's native tax engine
- Interface Vertex O Series with the POS system either by running it in each store's infrastructure, or by making it available to each store via your network

Both options offer you field-tested technology with built-in safeguards that keep your critical operations up and running at all times. As a result, you can run a more efficient tax department.

Edge Deployment for Maximum Availability

With Vertex O Series Edge, you can deploy fully-configured tax engine container images locally at the point of transaction to eliminate latency and maximize tax system availability even during peak selling times. This use of edge computing technology eliminates the worry about network connectivity and bandwidth and keeps the tax process at peak performance.

To learn more, visit VertexInc.com.



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