VERTEX + **salesforce**

Vertex for Salesforce Commerce Cloud

Vertex solutions for Salesforce Commerce Cloud enable organizations to streamline global tax determination in the invoice-to-cash process for B2B and B2C e-commerce.

Tax Calculation Across the Commerce Cloud

Seamless integrations between Vertex and Salesforce Order Management, B2B "Classic", Lightning D2C and B2C, and Headless Commerce, enable users to automate tax determination within the invoice-to-cash process.

A single Vertex tax engine can integrate across other Salesforce solutions as well as other transactional systems, to streamline maintenance and provide consistent tax determination across multiple systems and processes.

A Vertex tax integration helps organizations reduce errors, increase efficiency, and improve cash flow, while also enabling them to deliver a better, more frictionless customer experience. Vertex extends the automation and efficiency of the Salesforce solutions.

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Key Benefits

- **Reduced Risk:** Improved accuracy of tax determination for reduced audit risk.

- **Predictability:** Predictable pricing and performance regardless of how and/or where you transact.

- **Scalability:** Single global tax platform across multiple Salesforce solutions and other systems supports consistent tax determination and easy scalability.

- **Automation Efficiency:** Automated maintenance of tax rates and rules, reducing the risk of errors while eliminating manual efforts.

- **Composable Approach:** Users can plugin Vertex where it's needed today, and add integrations or tax content as the business grows.

- **Support:** Comprehensive pre- and post-implementation services and support by Salesforce-certified consultants and support specialists.

- **Salesforce-Validated:** All Vertex integrations are built to meet Salesforce standards and guidelines.

- **End-to-End Solution:** Vertex offers a full portfolio of solutions to automate the end-to-end tax process – from calculation to exemption certificate management to compliance and audit.

Vertex for Salesforce Commerce Cloud

Vertex offers market-leading tax solutions for the Salesforce Commerce Cloud to speed the Order-to-Cash process and reduce audit exposure.
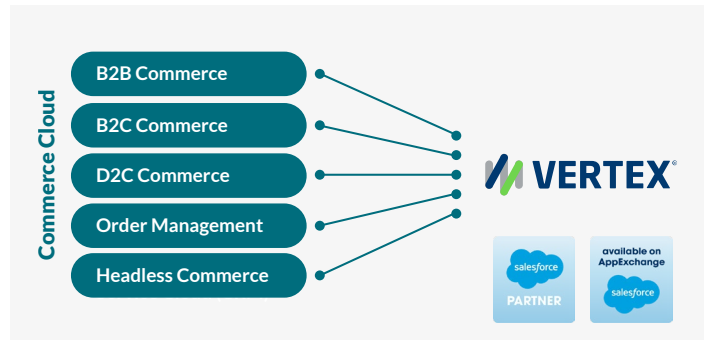

Why Add a Vertex Tax Engine?

While Salesforce does offer native tax calculation functionality, adding a Vertex tax engine streamlines the process and also offers more flexibility.

- Salesforce native tax functionality can handle SUT/VAT rate storage and simple tax calculation, but the Salesforce native functionality requires manual updates to tables for each and every tax related dependency including:
  - Tax code updates
  - Rate update
  - Jurisdiction update/addition
  - Complex three-party scenarios
  - Complex VAT scenarios
  - Product Master for legislative, regulatory and country rule updates
- Salesforce native functionality can turn off the tax calculation function, but it's all or nothing.
  - Vertex provides ability to choose when to override the tax function

Key Capabilities

- Supports tax determination on:
  - Orders (quotation)
  - Invoices (quotation and invoice)
- Address Cleansing for more accurate tax jurisdiction assignment
- Tax Drivers include:
  - Product ID, Product Class, Customer ID, Customer Class, Single Administrative, Origin Address, Physical Origin Address, Destination Address (configurable)

Key Differentiators

- Sales, use, and value added tax in a single global platform.
- Calculates tax consistently across any e-commerce medium (custom storefronts, mobile checkouts, and/or social media channels).
- Supports B2C and B2B commerce, including support for exemptions.
- Seamless, real-time tax calculation within customer carts regardless of unique checkout flow.
- No charge for tax calculation on abandoned carts.
- Records placed orders only to streamline jurisdictional reporting.
- Threshold management to support U.S. state liability requirements.
- Highly customizable with custom objects and fields to support unique business needs.
- Flexible deployment options, including cloud, on-demand, and on-premise.

Why Vertex

- Proud ISV partner for 5+ years
- 40+ years tax technology experience
- 4,000+ customers around the world
- World-class 200-person tax research team maintaining 700 million+ tax rules for 130+ countries
- End-to-end solution portfolio for global indirect tax

Questions? Email salesforce@vertexinc.com.

North America | Latin America | Europe | Asia Pacific

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