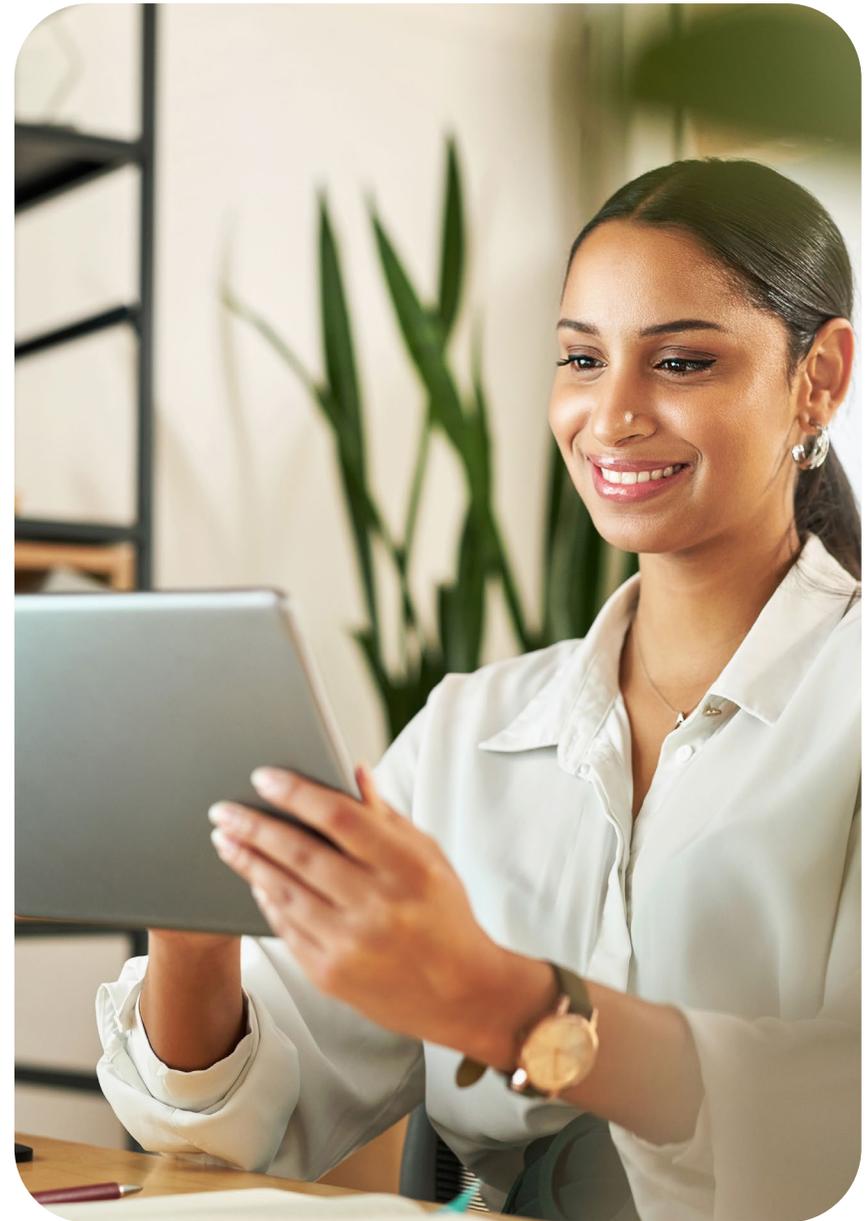# Tax Functions Salesforce Users Can Automate with Vertex

Leverage Automation to Spend Less Time on Manual Tasks

Every hour spent updating tax content in Salesforce applications is an hour lost on other, more important parts of your business. Rather than having your tax and IT teams spend precious time on manual tasks — like researching tax changes and updating tax content across all Salesforce clouds — you can automate these processes (and more) by integrating a Vertex tax engine with your Salesforce applications. This guide reviews the functions you can automate for each application including:

Introduction: Streamlining Tax with Salesforce + Vertex

As a Salesforce user, you can improve tax calculation processes by adding a single Vertex tax engine across all Salesforce clouds so that tax is calculated in real time. Immediate benefits include:

- **Eliminated manual processes**
- **Reduced audit risk**
- **Consolidated tax experience**
- **Improved scalability to quickly support business growth**
- **Reduced cost**

While Salesforce does offer native tax calculation functionality, adding a Vertex tax engine helps you to streamline the process by providing:

- **Greater efficiency:** Tax content is continually updated by Vertex in the tax engine. This means you don't need to update sales tax groups or tax codes in each application.
- **Centralization and standardization:** Integrating a single Vertex tax engine across all your Salesforce applications allows you keep all tax decisions in one place. You can configure your taxability to your company's unique needs, standardize the process across AR and AP and multiple businesses, and produce centralized consolidated reporting from the tax engine.
- **Automated tax calculation:** Vertex tax calculations are supported by 700 million+ data-driven tax rules. A global research team continually updates the tax rules and rates to keep you in compliance with the latest legislation.

The Vertex tax engine offers extensive tax content and features. You can efficiently centralize and automate tax determination for even the most intricate transactions across 20,000+ jurisdictions globally, in 195+ countries, backed by 100+ Vertex tax researchers. This comprehensive coverage includes horizontal industry content and provides specialized vertical content for sales and purchasing transactions.

Keep reading to see how Vertex elevates your tax process across each Salesforce application.

Vertex for Salesforce Sales Cloud

Automate tax determination on every transaction in real time.

- **Sales and seller's use tax content** (regularly and automatically updated) to provide real-time tax calculation on O2C transactions.
- **US and Canada tax content** to support businesses operating in North America.
- **VAT sales calculations** for EMEA and APAC.
- **Calculation of tax on sales, lease, and rental transactions.**
- **Address validation and cleansing*** to improve the accuracy of the Tax Area ID for a more precise calculation to enhance your customer source data and improve accuracy.
- **Tax details by jurisdiction** to know what tax is liable for each party in which authority including country, territory, province, state, county, district, and city along with tax code identification for streamlined reporting.
- **Added tax drivers** to support complex tax determination.
- **Flexible fields** to capture unique data fields from Salesforce Sales Cloud for a more precise tax calculation.
- **Custom objects and fields** to support unique business requirements.
- **Tax compliance options including software** to generate near-real time and periodic returns in-house and/or outsource the compliance workflow and returns filing process.
- **Exemption certificate management tools** to collect, validate, renew, and store audit-ready certificates. Auto apply compliant certificates to transaction calculation.
- **Compliant invoice generation tools** to meet local requirements (including online marketplaces).

* US transactions only

Vertex for Salesforce Revenue Cloud

Automate the quote to cash, order-to-cash, or invoice-to-cash process, and reduce audit exposure.

- **Sales and seller's use tax content** (regularly and automatically updated) to provide real-time tax calculation on O2C transactions.
- **US and Canada tax content** to support businesses operating in North America.
- **VAT sales calculations** for EMEA and APAC.
- **B2B registration validation** to manage Europe VAT.
- **Address validation and cleansing*** to improve the accuracy of the Tax Area ID for a more precise calculation to enhance your customer source data and improve accuracy.
- **Tax details by jurisdiction** to know what tax is liable for each party in which authority including country, territory, province, state, county, district, and city along with tax code identification for streamlined reporting.
- **Added tax drivers** to support complex tax determination.
- **Flexible fields** to capture unique data fields from Salesforce Revenue Cloud for a more precise tax calculation.
- **Conditional use of tax calculation** to give users greater control by allowing them to turn off tax calculation based on identified conditions.
- **Tax call status** enabling users to validate that tax calculations have been completed and applied to transactions.
- **Recalculation of quotes and orders** without increased service costs.
- **Simplified tax code setup** to eliminate laborious set-up and maintenance and transfer tasks to an automated and flexible design.
- **Tax compliance options including software** to generate near-real time and periodic returns in-house and/or outsource the compliance workflow and returns filing process.
- **Exemption certificate management tools** to collect, validate, renew, and store audit-ready certificates. Auto apply compliant certificates to transaction calculation.
- **Compliant invoice generation tools** to meet local requirements (including online marketplaces).
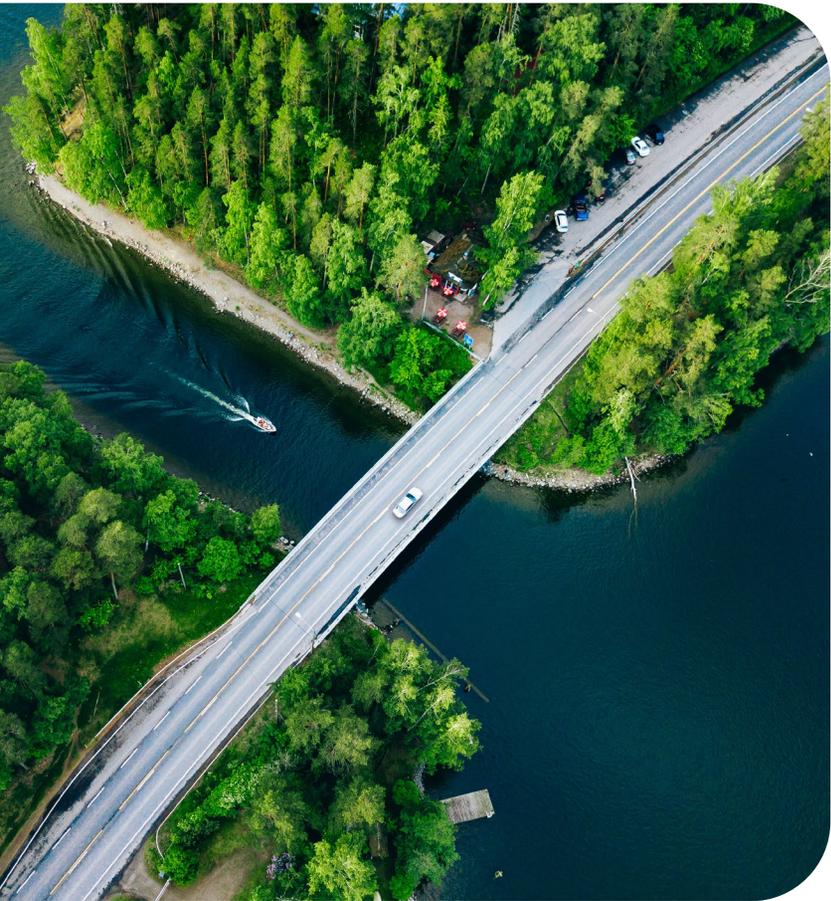
US transactions only

Vertex for Salesforce Commerce Cloud

Automate tax determination with the invoice-to-cash process.

- **Omnichannel support**, to assist with custom storefronts, mobile checkout, and/or social media channels.

- **B2B and B2C commerce**, including exemptions.

- **Real-time tax calculation in customer carts** regardless of checkout flow, with no charge for abandoned carts.

- **Remote seller threshold monitoring.**

- **Sales and seller's use tax content** (regularly and automatically updated) to provide real-time tax calculation on O2C transactions.

- **US and Canada tax content** to support businesses operating in North America.

- **VAT sales calculations** for EMEA and APAC.

- **Address validation and cleansing*** to improve the accuracy of the Tax Area ID for a more precise calculation to enhance your customer source data and improve accuracy. Includes support for multiple origin addresses – digital and physical.

- **Tax details by jurisdiction** to know what tax is liable for each party in which authority including country, territory, province, state, county, district, and city along with tax code identification for streamlined reporting.

- **Flexible fields** to capture unique data fields from Salesforce Commerce Cloud for a more precise tax calculation.

- **Custom objects and fields** to support unique business requirements.

- **Conditional use of tax calculation** to give users greater control by allowing them to turn off tax calculation based on identified conditions.

- **Tax compliance options including software** to generate near-real time and periodic returns in-house and/or outsource the compliance workflow and returns filing process.

- **Exemption certificate management tools** to collect, validate, renew, and store audit-ready certificates. Auto apply compliant certificates to transaction calculation.

- **Compliant invoice generation tools** to meet local requirements (including online marketplaces).

* US transactions only

The Vertex and Salesforce Partnership

Together, Vertex and Salesforce provide our joint customers accurate sales, and value added tax calculation across Salesforce Sales Cloud, Revenue Cloud, and Commerce Cloud. Available via the Salesforce AppExchange, Vertex solutions seamlessly integrate with your Salesforce Clouds, offering flexible deployment options and scalability to support business growth across the organization and around the world.

- Vertex has been a trusted ISV partner for 5+ years.
- Vertex and Salesforce are long-time customers of each other.

Ready to stop manual processes and automate tax with Vertex? Visit **vertexinc.com/partners/Salesforce** for more information.

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