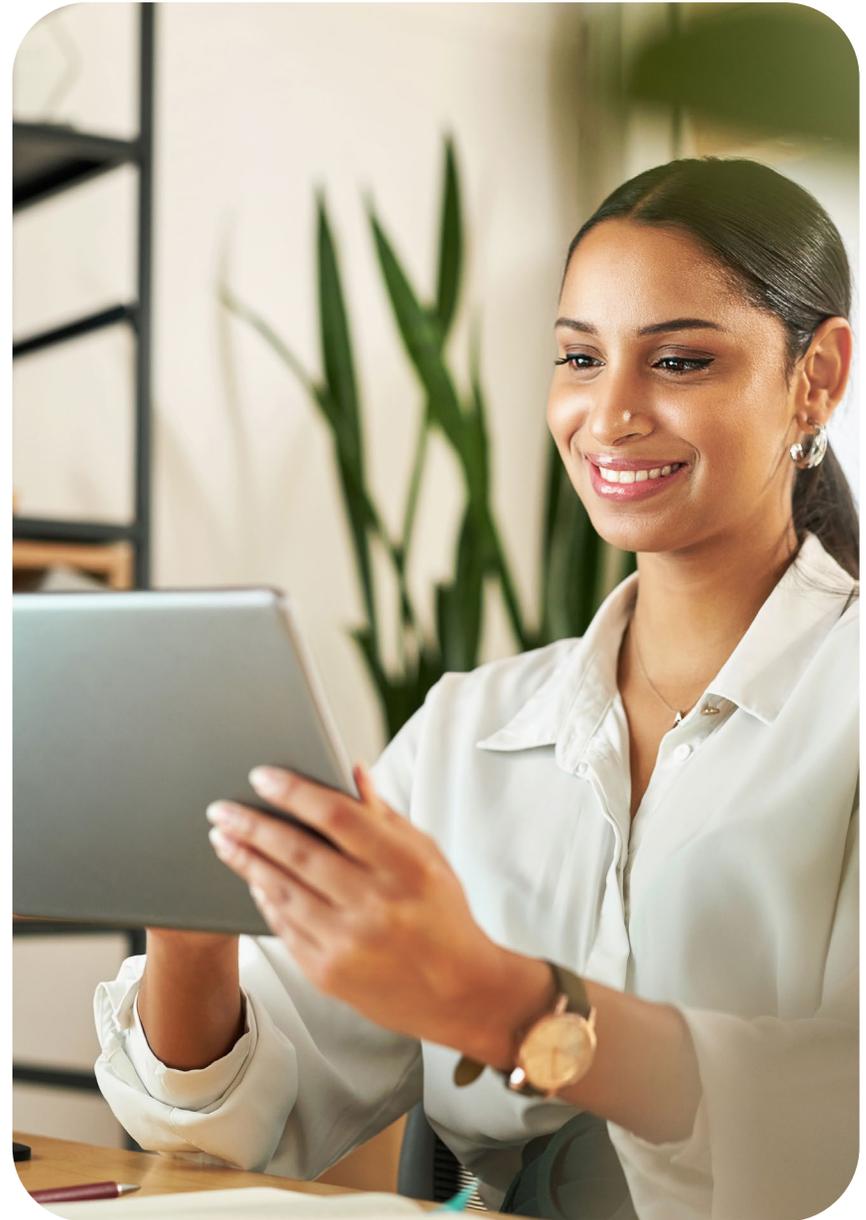# Tax Functions Workday Users Can Automate with Vertex

# Leverage Automation to Spend Less Time on Manual Tasks

Every hour spent updating tax content in Workday Financials 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 Workday — you can automate these processes (and more) by integrating a Vertex tax engine with Workday. This guide reviews the functions you can automate.

- An introduction on how a Vertex tax engine streamlines tax for Workday users

- Vertex for Workday solution (A list of what you can automate)

- As well as a short summary about the Vertex and Workday partnership

# Introduction: Streamlining Tax with Workday + Vertex

As a Workday Financials user, you can improve tax calculation processes by adding a Vertex tax engine to calculate tax 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 Workday 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.
- **Centralization and standardization:** Integrating a single Vertex tax engine with Workday 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.

# Vertex for Workday

**A Vertex tax engine allows users to standardize and centralize tax calculation for both AP and AR transactions in Workday Financial Management.**

- **Sales and seller's use tax content** (regularly and automatically updated) to provide real-time tax calculation on O2C transactions.
- **Consumer use tax on procurement** to automate and standardize tax calculation on requisitions and invoices, and validate sales tax charged on purchases.
- **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 D365 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.
- **Simplified tax code setup** to eliminate laborious ERP 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*

# The Vertex and Workday Partnership

A trusted partner and leader in the Workday ecosystem, Vertex continues to develop and deliver innovative tax solutions to help customers extend the value of their Workday investments, streamline tax determination and compliance, and accelerate business growth.

- Vertex has been a Workday Partner for 5+ years.
- Vertex and Workday are customers of each other.

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

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