VERTEX®

Vertex Indirect Tax Returns – North America

Automate Returns to Streamline Compliance

Manual processing of returns is a labor-intensive effort that can strain the resources of your tax department or accounting practice. Hundreds of different forms and e-file requirements across 10,000+ jurisdictions make compliance a complex and increasingly risk-laden challenge. Vertex Indirect Tax Returns helps by automating the creation of signature-ready returns and e-files so you can reduce the time and resources required for compliance, improve accuracy and reduce risk.

Save Time and Reduce Risk

The application enables you to streamline compliance, manage audits more effectively, and minimize assessments, thereby freeing up tax professionals to focus on more strategic activities. You can install and maintain the application on your desktop or access a cloud-based version that's always up to date. Either way, you get an advanced, reliable, automated solution for compliance from a trusted provider of tax content.
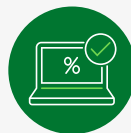
Compliance Automation

Vertex Returns is a Windows® application that automates the end-to-end compliance process – from data import and returns generation to check requests and reconciliation. Monthly content updates give you access to the latest forms and e-files, as well as the resources you need to support business growth. And by archiving all returns, schedules, and spreadsheets, it also help you improve audit performance.

Benefits

Efficiency
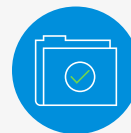Automate return preparation and check requests.

Accuracy
Have the right data in the right places in the latest tax forms and e-files.

Transparency
Create a clear audit trail of all tax calculations and adjustments.

Audit-Readiness
Use robust reporting, rate history, and archiving to support audit management.

Scalability
Economically support both single user departments and highvolume service providers.

Features

Easy Setup & Data Import

Reduce manual errors with a simple setup process and streamlined data imports from Vertex and non-Vertex tax data files.

Robust Content

Access 1,400+ return forms for US, DC, PR (and e-files for 38 states) and Canada, including specialty returns for food & beverage, business & occupation, and environmental taxes.

Direct Transmission e-File

Automate e-file preparation, transmission, ACH debit remittance, and acknowledgement receipts for CA and IL direct transmission.

User Tools

Automate workflow, calendar, and document management tools to streamline processes and improve control.

Reporting

Use convenient tools to generate 100+ standard reports, or leverage data to create custom reporting to support audits.

Automated Payment Requests

Generate, send, and track payment requests with full general ledger coding.

Credit Management

Easily manage, apply, and report on credit balances within the application to ensure return submission guidelines are met and credits are available for future filing periods.

Deployment Options

Choose from on-premise or hosted deployments to meet your specific IT and business needs.

Security

Role-based access allows you to control tax processes and data visibility, and audit logs ensure SOX compliance.

Ease of Use

The application is designed for ease of use so you can support tax processes without reliance on IT resources.

To learn more, visit VertexInc.com.

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