VERTEX® + **salesforce**

Vertex for Salesforce Revenue Cloud

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

Tax Calculation Across the Revenue Cloud

Seamless integrations between Vertex and Salesforce Billing, CPQ, and Subscription Management enable users to automate processes:

- Tax determination within the invoice-to-cash process
- Recalculating quotes and orders
- Handling single and recurring transactions without increasing service costs

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.

salesforce **PARTNER**

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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.

- **Flexibility:** Streamlined quote-to-cash process regardless of whether handling single or recurring transactions.

- **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 Revenue Cloud

Vertex offers market-leading tax solutions for Salesforce Revenue Cloud to speed the Order-to-Cash or Invoice-to-Cash process and reduce audit exposure.
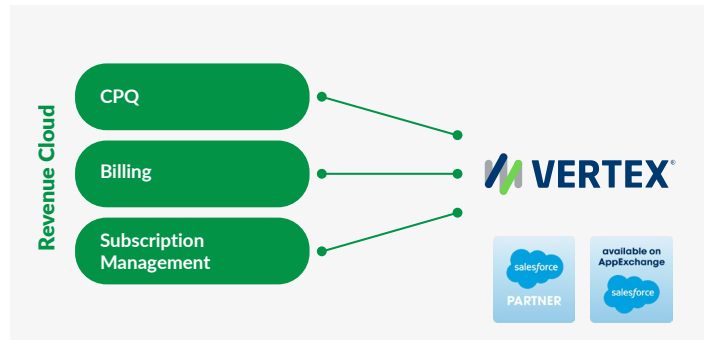
Why Add a Vertex Tax Engine?

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, single and batch)
  - Credits (invoice with negative values)
- 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.
- Tax determination is completely automated – no manual button pressing for every tax call.
- Consistent recalculation of quotes and orders, as many times as needed, without increasing service costs.
- Supports credit memos, negative tax amounts, and discounts.
- 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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