



Vertex for Salesforce Revenue Cloud (RLM)*

Vertex for Salesforce Revenue Cloud (RLM)* enables organizations to streamline sales tax determination throughout the quote-to-invoice process with precision and accuracy.

Tax Calculation Across Processes

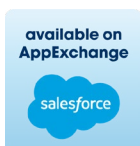
A seamless integration between the Vertex tax engine and Salesforce Revenue Cloud (RLM)* enables users to automate processes:

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

Vertex integrates directly to Salesforce Revenue Cloud (RLM)* implemented on the core Salesforce platform. Salesforce Revenue Cloud CPQ, Contracts, Orders, and Billing will be able to take advantage of Vertex sales tax calculations in the quote-to-invoice 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.



Key Benefits

- **Reduced Risk:** Improved accuracy of sales tax determination for reduced audit risk.
- **Predictability:** Predictable pricing and performance regardless of how and/or where you transact.
- **Scalability:** Single tax platform across multiple Salesforce solutions and other systems supports consistent tax determination and easy scalability.
- **Automation Efficiency:** Automated maintenance of sales tax rates and rules, reducing the risk of errors while eliminating manual efforts.
- **Composable Approach:** Users can plug in Vertex where it's needed today, and add integrations or tax content as the business grows.
- **Flexibility:** Streamlined quote-to-invoice 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.

* Revenue Cloud is the next evolution of Salesforce's natively built quote-to-cash solution, launched as Revenue Lifecycle Management in February 2024.

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Vertex offers market-leading tax solutions for Salesforce to speed the quote-to-invoice process and reduce audit exposure.

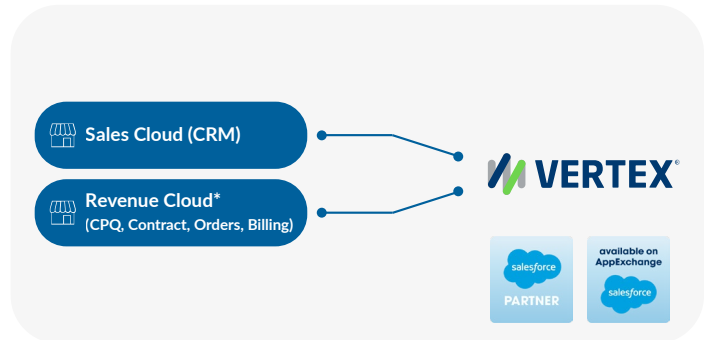
Why Add a Vertex Tax Engine?

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 sales tax 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
 - 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:
 - Quotes and Orders (quotation)
 - Invoices (quotation and invoice, single and batch)
 - Credits (invoice with negative values)
- Tax Drivers include: Product ID, Product Class, Customer ID, Customer Class, Single Administrative, Origin Address



Key Differentiators

- Sales 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, 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 900 million+ tax rules for 195+ countries
- End-to-end solution

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Questions? Email salesforce@vertexinc.com.



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