

Address Cleansing Solutions

Clean customer data for improved tax, invoicing, and shipping accuracy

The Vertex calculation engine uses proprietary technology to pinpoint a precise tax jurisdiction for every transaction address. But this technology relies on accurate and complete addresses from the ERP or host financial system. Improving the completeness and accuracy of each address will, in turn, improve the accuracy of tax jurisdiction assignment for enhanced tax accuracy. And the USPS-approved format improves invoicing and shipping accuracy.

Cleanse U.S. Addresses and Pinpoint Tax Jurisdictions

Vertex offers address cleansing solutions to improve tax accuracy, invoicing, and shipping. The solutions include these steps:

- Complete, correct, and cleanse the U.S. street address using USPS CASS data
- Assign (or correct) the ZIP+4 code using the latest USPS ZIP+4 and street segment data
- Resolve complex scenarios such as districts crossing city boundaries, districts overlapping other districts, and more
- Assign the Tax Area ID (TAID) for state, county, city, and district

Once cleansed, addresses can be auto-imported back into source systems by the customer to update master data for improved tax accuracy, invoicing, and shipping.

Two Options for Maximum Flexibility

Vertex provides customers with two options for address cleansing. Customers can utilize one or both of these options.

- **Vertex O Series Address Cleansing**
Add real-time address cleansing to the Vertex O Series tax engine. During each U.S. transaction, the address cleansing feature will perform the (above) steps in real time to improve the tax determination.
- **Vertex Address Cleansing Batch Service**
Cleanse address files in batches outside your O Series tax engine. Simply send addresses to Vertex in a pre-defined .csv file format for cleansing and correction. Vertex will cleanse and correct the addresses (see above) and return the cleansed file along with an error report within five (5) days. Customers can leverage the batch service for one-time or periodic address updates.

Contact Us Today

Contact Vertex today to discuss how address cleansing solutions can improve your tax process.

U.S. addresses only. Real-time address cleansing is included in Vertex O Series Cloud, and is available as an add-on to Vertex O Series On-Demand, Vertex O Series On-Premise, and Vertex Payroll Tax Q Series On-Demand licenses for an additional fee. Batch service is available to all customers. Customers using Vertex Cloud Indirect Tax (i.e. "Classic" Cloud), address cleansing capabilities are located within the application. Payroll Tax address cleansing also assigns payroll tax jurisdiction, township and school district, and political sub-division (PSD) code.

