

End-to-End Sales and Use Tax Solution

Calculation and compliance in a single integrated cloud solution.

The Vertex cloud platform offers a single, integrated, end-to-end solution for sales and use tax – ideal for mid-size companies doing business across the U.S. A single solution. From a single trusted vendor. Using a single UI. And a single unified data source.

Manage the end-to-end process

From tax determination to exemption certificate management to returns – you’ll streamline calculation through compliance, improve tax accuracy, and reduce manual work. Task-specific apps all leverage a common data foundation and a common user interface to streamline tax processes and improve efficiency.

- **Tax determination:** Powerful tax determination engine maintains the latest rules, rates, and sourcing logic to keep you up to date. Need to expand beyond the US? We handle that too!
- **Content:** Continually updated tax content helps ensure accuracy and saves time by automatically handling the complexity of tax laws across all locations and transactions, allowing you to focus on what matters most without the need for constant monitoring or expertise.
- **Integrations:** Vertex-built integrations to ERP, e-commerce, procurement, and other systems requiring a sales or use tax calculation.
- **Address Cleansing:** Real-time address cleansing enhances your source data and ensures precise jurisdiction assignment for every U.S. transaction.

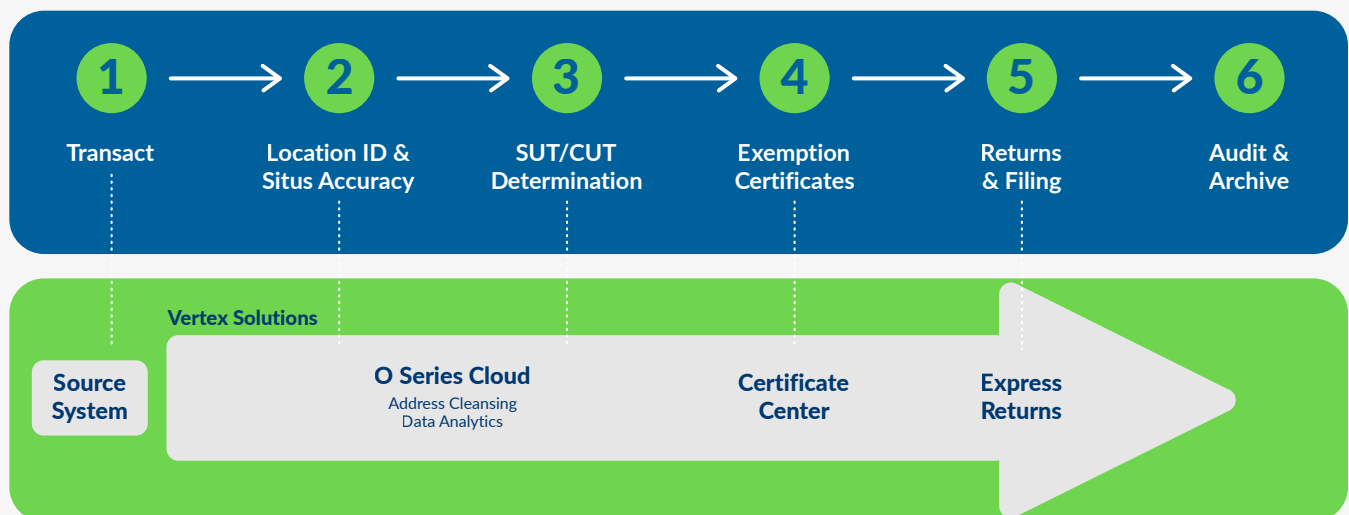
- **Exemption Management:** Streamlined exemption management and certificate tools help you stay on top of exemption certificates, support audit, and ensure tax-exempt customers are charged correctly.
- **Nexus Tracking:** Nexus threshold dashboard lets users monitor their obligation to register and collect tax in every U.S. jurisdiction.
- **Data Intelligence:** Insightful tax analytic tools make tax and rate changes easy to see and alerts users to potential risk and audit-trigger events.
- **Returns:** Integrated, auto-generated returns to support monthly compliance. Or, ask about our SUT Compliance Service to outsource returns, remittance, and notices.

Benefits

- ✓ Improved tax accuracy for reduced audit risk
- ✓ Streamlined automation for process efficiency
- ✓ Reduced IT maintenance
- ✓ Scalability to support growth
- ✓ Multi-year price lock for predictable budget planning

Managing sales & use tax with Vertex

The combination of Vertex O Series Cloud, Vertex Certificate Center[®], and Vertex Express Returns[®] provides a secure, integrated, and automated E2E solution to manage sales and use tax calculation and compliance for your business.



Features

Determination

- **Centralized Calc & Returns**
Centrally manage U.S. calculation and filings in a single platform integrated to your source transaction systems for sales and procurement.
- **Easy Configuration**
Quickly configure your tax engine with seamless integration to certificate and reporting modules. User-friendly interfaces provide personalized guidance to ensure your certificate management and reporting are aligned with your business needs.
- **Multi-System Integrations**
Easily connect to new systems. A single Vertex O Series tax engine supports multiple financial systems to centralize tax determination across a growing business. Leverage 150+ integrations and APIs to connect the Vertex tax engine to all your ERP, e-commerce, CRM, procurement, and other transaction systems.
- **Robust Content**
Vertex Research maintains the latest tax calculation rates, sourcing logic, compliance rules, and return and exemption forms for U.S. taxing jurisdictions. Content is automatically updated in the cloud platform to ensure you comply with the latest regulations.
- **Flexible Taxability Setup**
Simple set-up of unique taxability rules, exemptions, and data for multiple legal entities. Built-in flexibility for complex tax policy scenarios.
- **Exemption Management**
Integrate the tax engine with Vertex Certificate Center^{*} to stay in front of exemption management and improve the accuracy of tax-exempt transactions. Robust tools and workflows to automate certificate collection, validation, tracking, and renewals. Searchable repository for tracking and audit support. Plus a self-service certificate submission tool.

- **Address Cleansing**
Real-time address cleansing for U.S. transactions provides “rooftop” tax jurisdiction assignment for improved accuracy.
- **Nexus Threshold Tracking**
Monitor real-time progress toward various state nexus thresholds to identify upcoming registration, collection, and filing needs.

Compliance

- **Automated Data Transmission**
Eliminate manual data processing to generate monthly returns. Transaction data is automatically sent from the tax engine and mapped directly to the required return form fields.
- **Returns Generation & Archiving**
Add Vertex Express Returns^{*} to the tax engine for integrated one-click auto-generation of PDF and EDI files each month or filing period. Review, edit, and sign returns. Access archived returns for convenient audit support. Supports the latest return forms for U.S. sales tax, seller’s use tax, consumer use tax, industry-specific and specialty tax forms. Support expansion into Canada with Canada GST, HST, PST/RST, and QST support.

Usability

- Centralized, role-based user access
- 24/7 global access from anywhere
- Audit logs
- Single platform, single sign-on (SSO)
- Federated security
- SOC 1 Type 2 and SOC 2 certified, ensuring the security of financial and tax data
- Vertex Copilot^{**} for AI-generated product answers without leaving the workflow

^{*} add-on purchase, requires separate license

^{**}Note: Product documentation used by Vertex Copilot has been reviewed by subject matter experts to ensure it meets our internal standards for quality and completeness. However, as a generative AI, Vertex Copilot creates responses for every question and may not always be accurate. Users should review and confirm the information provided. If users have questions about the response from Copilot, they can verify the information by reviewing the product content on Vertex Community. Links to the relevant articles used by Copilot are included with the response.

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