

VIEWPOINT



Patricia Rocha Jordan
Solutions Marketing
Manager, Vertex

Patricia Rocha Jordan is a solutions marketing manager at Vertex, focusing on indirect tax solutions across Europe. She has extensive experience in implementing indirect tax technology transformation projects at Deloitte and KPMG, in English, Spanish, and Portuguese.



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E-invoicing: Centralize and consolidate to increase efficiency and compliance

Under pressure from government regulatory bodies as they compete in the global economy, businesses should centralize and consolidate e-invoicing processes. Combined with value-added tax (VAT) workflow automation, a modern e-invoicing platform can greatly enhance a company's effectiveness, according to our recent interview with Patricia Rocha Jordan, solutions marketing manager at Vertex.

What is e-invoicing? How has it evolved technically over the past decade, and what is its future?

E-invoicing is the electronic exchange of invoice data between suppliers and buyers in a structured, machine-readable format. It has evolved from PDF attachments to Universal Business Language (UBL) and Peppol APIs [application programming interfaces], enabling real-time transmission and supporting continuous transaction controls implemented through government platforms with digital signatures and validation.

The ultimate goal is to eliminate manual processing, reduce errors, and enable tax authorities to close VAT gaps through automated compliance checks. The future of e-invoicing likely includes blockchain for enhanced traceability and immutability, with several tax authorities already piloting distributed ledger solutions for invoice verification, alongside AI [artificial intelligence] for intelligent data extraction and validation — transforming what was once a document into a dynamic data exchange.

How are e-invoicing and VAT related? What technical capabilities are needed to handle current tax mandates?

E-invoicing serves as the technical backbone for real-time VAT reporting and collection. In the compliance cycle, e-invoices capture transactional data that feeds directly into VAT returns, which are usually filed monthly or quarterly. For that reason, reconciliation between e-invoices and VAT returns is a critical process that ensures accuracy and prevents compliance gaps.

Technical capabilities must include digital signature implementation, format conversion tools for country-specific standards, secure API connections to government platforms and/or other portals, and audit-ready storage systems that maintain document integrity for required retention periods. The solution should also incorporate robust error-handling protocols with alert systems for failed submissions to government platforms. And finally, it must support data flows to and from source systems, automating both accounts payable and accounts receivable transactions.

Why is integration with enterprise resource planning (ERP) systems important, and what are the key technical factors that should be considered?

ERP integration eliminates duplicate data entry, reduces errors, and provides end-to-end transaction visibility while ensuring that the ERP system remains the single source of truth for all invoice data. Key technical considerations include:

- API compatibility – ensuring your systems can “talk” to each other
- Master data synchronization – keeping customer and vendor information consistent and aligned
- Data mapping – translating internal codes to standardized formats
- Transaction monitoring – tracking invoice status from creation to payment

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Performance impact must be considered too, as poorly designed integrations can slow down ERP processing during peak times.

What security measures are essential in an e-invoicing system?

In a secure e-invoicing system, data should be encrypted both during transmission and while stored. Users must verify their identity through multiple methods, and access should be limited, based on job roles. Digital signatures verify document authenticity, while comprehensive activity logs track who did what and when. The system should actively monitor for suspicious activity, have secure API connections, undergo regular security testing, and routinely update security credentials. Integration with existing identity management systems, automated compliance reporting, and granular permission controls at the document field level provide additional security depth that sophisticated enterprises require.

How should data privacy requirements such as the General Data Protection Regulation (GDPR) and e-invoice archiving be handled across different countries?

We recommend choosing a comprehensive solution that complies with global data privacy requirements from the start. This eliminates the need to procure different software for each region. The ideal platform should offer configurable data residency options to meet various jurisdictional requirements while maintaining centralized control. It should manage varying retention periods and implement

data-privacy-compliant processes including encryption, access logging, and proper workflows. For instance, when handling transactions within the EU, the system should automatically apply the GDPR requirements.

Beyond compliance, what are the benefits of implementing a centralized and consolidated e-invoicing platform?

A centralized e-invoicing platform streamlines operations by standardizing invoice processing across all countries, requiring less system maintenance, and providing a single dashboard to monitor all invoices. For IT teams, this means fewer support tickets, reduced technical staff requirements, and simplified infrastructure management. You'll gain valuable business insights from consolidated transaction data and only need to onboard trading partners once. The IT department benefits from standardized APIs, fewer integration points to maintain, and centralized security controls.

What is the recommended technical evaluation process for selecting an e-invoicing solution?

Create a vendor shortlist based on technical requirements across all operating jurisdictions. Evaluate global coverage, proven tax authority integrations, and compatibility with your existing systems. Review each vendor's support model, implementation methodology, and road map to ensure they'll keep pace with evolving mandates. Finally, prioritize solutions with demonstrated multi-country compliance expertise and enterprise-grade security certifications.

Discover how Vertex can help your organization deliver improved business outcomes with innovative e-invoicing solutions. Click [here](#) for more information.