

# Vertex Express Returns

## Integrated, add-on compliance tool for Vertex O Series Cloud

Centrally manage US/Canada calculation and filings. Add Vertex Express Returns to the Vertex O Series Cloud tax engine for a simple end-to-end cloud solution for sales & use tax calc and returns. Reduce risk and improve tax operations efficiency in a unified cloud platform.

### Automated Signature-Ready Returns

Vertex Express Returns automates monthly and periodic sales and use tax returns generation, delivering process efficiency and accuracy for all sales and purchasing transactions in the US and Canada, integrated in the same cloud platform as the tax engine.

- Automatically populate returns directly from Vertex O Series Cloud tax engine data for a centralized, end-to-end calc and compliance solution.
- No manual data import or mapping to return forms.
- Automated generation of returns in PDF and EDI file formats each month or filing period.
- Improved data transparency and quality, auditability, reporting and control.
- Ensures compliance with the latest jurisdictional requirements and forms, relieving tax teams of this burden.
- Centrally managed solution for sales and use tax filings to meet state/province and local reporting requirements for US and Canada.

- User-friendly interface includes workflows, tools, and status tracking designed to improve tax team efficiency, visibility, and control of the returns and reporting process.
- Standard reports help users improve data accuracy and reconciliation across their systems.
- Reduces the time and effort required for monthly or periodic compliance, streamlines the processes, and scales easily to support business expansion and growth.

### Streamline Monthly Compliance

Vertex Express Returns provides companies an affordable, automated and user-friendly way to support their monthly and periodic sales and use tax returns process, delivering efficiency and improved processes, improved accuracy in returns and reporting, and better manage and ensure timely filing to the jurisdictions.

### End-to-End Solution

Adding Vertex Express Returns to the Vertex O Series Cloud calc engine delivers a streamlined, integrated, end-to-end solution to support sales and use tax calculation and periodic reporting for US and Canada with zero IT team implementation or maintenance needed.

## Benefits



Automated



Accurate



Efficient



End-to-End

## Features



### Comprehensive Returns Content

Supports returns and reports for US (SUT) and Canada (GST, HST, PST, RST, QST) filing requirements. Latest forms for in-state & out-of-state reporting, local jurisdictions, and specialty tax forms (Food & Beverage, Business & Occupation, Environmental).



### Simple Configuration

Calc engine configurations are automatically passed to Express Returns to streamline setup and ensure consistency between the systems. A user-friendly interface guides additional setup for taxpayer settings, locations, and other information required to streamline auto-preparation for each registered jurisdiction.



### Automated Data Transmission

No manual data upload needed. O Series Cloud automatically sends transaction data to Express Returns which maps transactional tax data to the required return form fields.



### Data Editing

After automated data import, users can edit tax values in the application without altering their source systems. Tax changes will trigger automatic updates to related line items as needed to help avoid data misalignment errors in the returns.



### Automated Returns Generation

One-click auto-generation of returns each month or filing period. Returns can be generated as a signature-ready PDF file, as well as an EDI file for easy e-File submission.



### Dashboard Visibility

Convenient dashboard provides quick and clear visibility into current and prior filing periods including returns due, filing dates, and progress/status. Users can filter view by company, date range, and other fields.



### Workflow & Tracking

Once returns are generated, a workflow tool and interface allows users to conveniently manage and track their internal review and processing of each return. Users can customize their view by filing period and status to see a list of the relevant returns along with due dates and urgency indicated.



### Credit Management

Automatically identify returns with negative values to easily create and track credits for future filing periods without tracking manually with spreadsheets.



### Reporting

Standard reports help improve productivity, accuracy and control over compliance processes. Reports include Unassigned Data Report, Payment Reconciliation Report, and Activity Report.



### Single Platform, Single Sign-On

Single, secure, cloud platform and log-in for O Series calculation and Express Returns with a shared experience for tax team efficiency.

To learn more, visit [VertexInc.com](https://VertexInc.com).

