VERTEX®

SAP Silver Partner

Accelerate tax in SAP with Vertex

- Certified SAP partner for 25+ years
- Delivered with embedded SAP apps
- Aligns with SAP Clean Core
- 1,000+ mutual customers
- Over 60% of Fortune 500 run Vertex

SAP Endorsed App
PREMIUM CERTIFIED

Available on SAP Store

SAP Certified
Integration with RISE with SAP S/4HANA Cloud

SAP Certified
Built with SAP Business Technology Platform

Global Indirect Tax Solutions Across the SAP Ecosystem

Customer Experience
- SAP Commerce Cloud

Spend Management
- SAP Ariba Central Invoice Mgmt.
- SAP Ariba

VERTEX — Accelerator+ for SAP ERP

SAP ERP
- SAP ECC
- SAP S/4HANA On-Premise
- SAP S/4HANA Private Cloud
- SAP S/4HANA Public Cloud
- SAP Business ByDesign

Aligned to Clean Core

= Available on SAP Store

= SAP Endorsed App PREMIUM CERTIFIED

Supports SAP RISE and GROW migrations

Delivering a True Global End-to-End Tax Solution

Tax Determination

- **O Series**
- **Cert Center**
- **Validator**

- Tax determination
- Global SUT/VAT content coverage
- 1 billion+ data driven tax rules, updated regularly
- Exemption certificate management
- Nexus threshold monitoring
- Registration validation
- Address cleansing
- Billing accuracy
- Data Insight

- **Accelerator+**
- **PLUS Tools**

Solving Tax Gaps within SAP
- Rapid deployment integration tools
- Chain flow configuration for VAT
- Extensive SAP reporting and logging
- P2P and O2C tax optimization tools
- Automated testing in SAP
- SAP master data management

Compliance & Reporting

- **Compliance**
- **e-Invoicing**
- **Invoice IQ**

- SUT/CUT Compliance software & outsourcing svc
- VAT Compliance software
- E-invoicing
- Traditional digital invoicing add-on
- Reconciliation capability
- Reporting and analytics

Technical Platform

- Connect to S/4HANA on-premise, private cloud, or public cloud
- Single cloud platform with support for multiple SAP ERPs (S/4HANA, ECC)
- Secure, with high availability
- Edge deployment options
- Data Intelligence, archiving and doc storage

"Successful partnerships are formed on cooperation, trust, and delivery of successful outcomes for our customers. For over 25 years, Vertex has demonstrated what it takes to be a successful partner, and most importantly, helped SAP customers address tax complexity and risk through innovative solutions. Working together, Vertex and SAP help customers achieve improved business transformation results."

- Denny Wall, Vice President, North America Software Partner Solutions, SAP America, Inc.

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Tax Determination for SAP ECC

At a Glance

Tax Determination for SAP ECC

Major Tax Types

- Sales tax
- Sellers use tax
- Consumer use tax
- Goods and services tax
- Value added tax
- Brazil regime and reform
- Discretionary fees

Vertex Deployment Options

- Cloud (SaaS)
- Hybrid cloud, Edge
- On-demand cloud
- On-premise
- VAT Decision Tool add-on

Business processes supported:

- Sales
- Procurement
- Intercompany
- Invoicing
- Billing
- Adjustments
- Dispute defense

Key Features

- Global tax content
- Jurisdiction precision
- Line-level liability
- Multi-system, multi-entity, multi-region
- Exemption management
- Nexus threshold tracking
- Currency conversion
- Custom taxability setup (outside the SAP core)
- Structured tax data
- Compliance-ready data
- Audit reporting

Automated Global Determination

A Vertex tax determination solution provides a globally accessible tax framework for SAP ECC organizations - reliable, efficient, scalable, and secure tax determination.

- Global tax rates and legislative changes automatically updated every month.
- Multi-jurisdictions, multi-channels, multiple source system (easily migrate to SAP S/4HANA)
- Centralize, structure, and tax-sensitize business data across sales and procurement
- Streamline accurate estimates, invoicing, billing, payment, and CTC support
- Reduce (or eliminate) monthly tax research
- Eliminate tax content updates in every supported system
- Eliminate need for IT to manage custom code, custom configuration, master data updates, content updates, custom reporting & data analytics – keep the core clean!
- Improve tax accuracy on standard and complex scenarios
- Manage exemptions, currency, and B2G/B2B VAT ID validation
- Support high transaction volumes and large invoices
- Improve reporting for reconciliation, recovery, and internal analysis
- Be ready for customer inquiries and audit defense

Robust Integration

The Vertex Accelerator+ for SAP ERP provides advanced integration, configuration, and reporting tools for rapid deployments. It centralizes and streamlines tax-related business functions and responsibilities in a single user interface inside the SAP environment.

- Advanced data mapping
- Intelligent chain flow visualization
- Streamlined set-up & configuration
- Advanced reporting & reconciliation
- Simplified troubleshooting & testing
- Dynamic tax codes for compliance
- Single global company code
- SAP Add-On option for VAT determination

Add-ins to Solve Tax Gaps

The Vertex PLUS Tools for SAP ERP provide simple add-ins for common gaps in P2P and O2C, providing quick efficiencies to complex tax challenges including data enrichment, testing and purpose-built reporting to close process gaps. The PLUS Tools deploy in your SAP ERP system and seamlessly integrate with the Vertex tax engine ensuring consistency between systems and across business functions.

Embedded Tax Accuracy in SAP ECC

Procurement

- SRM
- Purchase Orders
- Service Entry
- Purchase Requisitions

Accounts Payable

- Logistics Invoices
- FI-AP Invoices
- FI-AP Credit memos
- Accounting Docs
- Cancellations
- Reversals
- Tax-only credits*
- Tax-only debits*
- Invoice Reconciliations
- Invoice Approvals

Accounts Receivable

- Billing Documents
- FI-AR Invoices
- FI-AR Credit memos
- Accounting Docs
- Cancellations
- Reversals
- Tax-only credits*
- Tax-only debits*
- Recurring Journal Entry

Sales

- CRM
- Sales Quotation
- Sales Orders
- Debit Memos
- Credit Memos

Master Data

Jurisdiction Assignments

- Company Codes
- Business Partners
- Customers
- Vendors
- Plants
- Cost Objects
- Storage Locations
- Shipping Points
- Purchase Orders
- Sales Orders

Other

- Customer Reports*
- Material Movement Reports*
- Procurement Card Reports*
- Custom Load Files*
- CRM

VAT & Global Compliance

- Intra-Community Supplies
- Triangulation Transactions
- Reverse Charge Mechanisms
- Self-Billing Procedures
- Fiscal Representative Management
- Digital Reporting (SAF-T, SII, etc.)
- e-Invoicing Compliance
- Input/Output VAT Registers
- Periodic VAT Returns
- EC Sales Lists/Intrastat Reporting
- Real-time Transaction Reporting*

Cross-Border Transactions

- Import/Export Controls
- Customs Value Determination
- Chain Transactions
- Drop Shipments
- Foreign Trade Zone Processing
- Consignment Warehousing

Transaction Data → VERTEX → Tax Amount

= enhanced integration points enabled through Accelerator & PLUS Tools

Vertex is continuing to build for RISE and GROW initiatives, and developing on SAP's Business Technology Platform (BTP). This move aligns with market demands for scalable, flexible, and efficient solutions, and adheres to SAP's future direction and "Clean Core" principles.

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Tax Compliance for SAP ECC

At a Glance

VAT Compliance for SAP ECC

Capabilities

- e-Invoicing
- e-Reporting
- Periodic reporting
- VAT ID validation
- Digital invoicing add-on

Prebuilt Integrations

- Integrated Calc & Express Returns (North America)
- Vertex e-Invoicing
- Vertex VAT Compliance

Benefits

- Continuous compliance
- Consolidated platform
- Single transmission point
- Multi-country support
- Global access
- Reduced maintenance
- Operational efficiency
- Transparency and control
- Data governance
- Data security
- Automated workflows
- Audit defense and archiving
- Purpose-built integrations for scale and faster go-live
- API & SFTP options
- Integrated E2E solution
- Improved cashflow management

Global Tax Compliance and e-Invoicing

Vertex provides SAP ECC multi-national users with a single, integrated, cloud platform to streamline multi-system compliance for periodic returns, e-invoicing, and e-reporting across the organization.

US/Canada Returns Options

- Integrated calc & returns using Vertex O Series Cloud & Vertex Express Returns
- Full-function automated returns generation with data from any source using Vertex Indirect Tax Returns-North America
- Outsource SUT, CUT, and GST compliance— from returns generation and approval, to filing, remittance, and notice management.

Global e-Invoicing and VAT Returns

- Streamline e-invoicing data transmission to and from multiple SAP ERP sources
- Single connection points to automate multi-country, multi-entity VAT obligations for sales and purchasing transactions
- Continuous transaction control to meet global reporting requirements
- Digitization mandates supported worldwide – SAF-T, UK MTD, Spain SII, and the latest e-invoicing regulations
- e-Invoice creatiton, validation, submission & clearance (including Peppol) returning necessary artifacts back to the billing system
- Periodic VAT reporting including VAT ID validation, built-in currency conversion, and aggregated or consolidated reporting
- Automated reconciliation between e-invoicing, e-reporting, and periodic filing against the SAP ECC GL
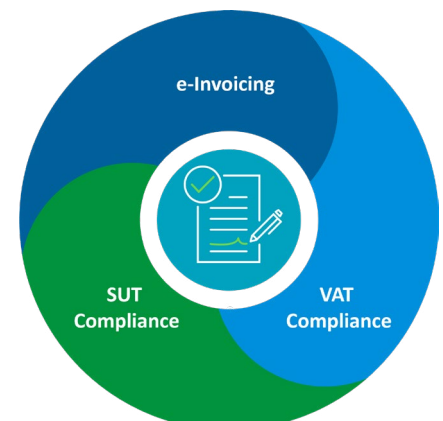- Standardize data, streamline workflows, and defend audits

Continuous Transaction Control

Ensure continuous compliance - automate, govern, and defend across your multiple systems under a consolidated platform:

- Collect the right data from your ERPs for each reporting requirement
- Ensure invoices or billing docs are signed, cleared, reported, and returned
- Ensure periodic reports and returns are created accurately, validated, reconciled, and centralized
- Built-in status tracking, workflow, archiving, and audit support to meet internal pressure, external deadlines, and inquiries.

Robust Integrations

Vertex pre-built and validated compliance integrations and integrated returns for SAP ERP translate calculation data into compliant reporting. This saves time and drives efficiency collecting the right data, improving data accuracy, and streamlining the compliance process.

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