



Supporting the Full End-to-End Indirect Tax Lifecycle:

Vertex's Product Suite Explained



Vertex understands the complexities tax, accounting, finance, and IT professionals face in managing the full indirect tax lifecycle. From determination and calculation to reporting, compliance, and long-term planning, each step presents risks—tax errors, inefficiencies, and potential audit penalties.

To help you navigate these challenges, we offer a portfolio of solutions and services.

Read this guide to discover what you can leverage, in addition to Vertex O Series, to better manage the entire end-to-end tax lifecycle.

“Achieving true compliance requires a holistic, end-to-end approach—one that goes beyond just implementing a tax engine. It demands seamless integration across the entire tax lifecycle, from determination and calculation to reporting, filing, and ongoing compliance management—including historical audit, and the ability to plan and test for the future. By addressing each step in the process businesses can help ensure accuracy, reduce risk, create consistency, and maintain compliance in an ever-evolving regulatory landscape.”

– Michael Bernard
VP - Chief Tax Officer
at Vertex



Table of Contents



Determine and Calculate	4	Report, Comply, Pay, and File	11
Vertex O Series (tax engine)	5 - 6	Vertex Indirect Tax Returns - North America	12
Vertex O Series Edge (deployment)	5	Vertex Express Returns	12
Vertex Accelerator+ for SAP ERP	6	Vertex Sales and Use Tax Compliance Service	12
Vertex PLUS Tools for SAP ERP	6	Vertex e-Invoicing and VAT Compliance	13
Vertex Accelerator for Oracle Cloud ERP	6	Vertex VAT Compliance Service	14
Vertex Solutions for E-Commerce Businesses	6		
Vertex O Series Add-Ons	7 - 11	Retain, Defend, and Plan	15
Vertex O Series Address Cleansing	7	Support and Optimization	16
Vertex O Series Latitude / Longitude Jurisdiction Locator	7	Ongoing Customer Support (including Vertex Copilot) and Premium Support	17 - 18
Vertex Validator	8	Global Professional Services: Vertex System Health Check Service & Vertex Staff Augmentation Service	19
Vertex Invoice IQ	8		
Vertex Certificate Center & Service	9	Contact Us	20
Vertex Indirect Tax Intelligence	10		





Determine and Calculate

There are over 20,000 taxing jurisdictions worldwide, each with its own liability and supply rules, cross-border transfer interpretation, and product and exemption rates and rules that can change at any time. Staying on top of the latest tax regulations and standards can feel overwhelming. We understand how daunting and time-consuming this can be, especially if you're managing changes manually or differently between systems; it's not only inefficient but also prone to errors.

Determine

Calculate

Report

Comply

Pay

File

Retain

Defend

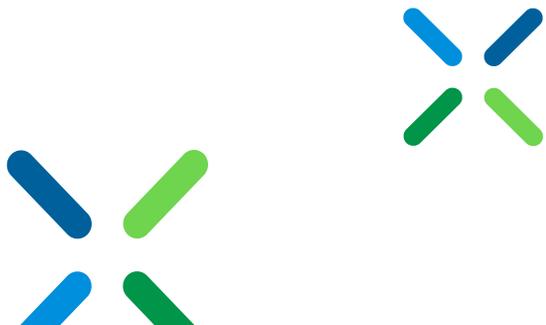
Plan



Vertex O Series (tax engine)

Our flagship solution, the [Vertex O Series tax engine](#) helps you streamline and centralize global indirect tax calculations across transacting systems. You can license, implement, and configure the tax engine to meet your specific business needs:

 Determine deployment	 Choose integration(s)	 License tax content
<ul style="list-style-type: none">• Cloud/SaaS• Edge Computing• Hybrid Cloud• On-demand• On-premise	<ul style="list-style-type: none">• SAP• Oracle• NetSuite• Microsoft• Salesforce• Workday• And 150+ ERP, e-commerce, procurement, & other financial systems	<p>Standard Content:</p> <ul style="list-style-type: none">• Sales and Use Tax, Consumer Use Tax and/or Value Added Tax <p>Premium Content:</p> <ul style="list-style-type: none">• U.S.: Oil & Gas, Hospitality, Communications• Global: Medical, Leasing• Europe: Minerals & Metal• Brazil (including tax reform)





We also offer highly developed accelerators to optimize performance and outcomes within SAP ERP and Oracle ERP:

- **Vertex Accelerator+ for SAP ERP** centralizes and streamlines tax-related business functions and responsibilities in a single user interface inside the SAP environment including easy-to-access data mapping, dynamic tax codes, transaction reporting, chain visualization, global company code, and more. It's a simplified tax user experience localized in the SAP workstation without burdening the SAP core.
- **Vertex PLUS Tools for SAP ERP** provide simple add-ins for common process gaps in P2P and O2C. They address complex tax challenges including data enrichment, testing, drop-shipment, and purpose-built reconciliation reporting to expedite tax and accounting tasks without burdening the SAP core.
- **Vertex Accelerator for Oracle Cloud ERP** provides embedded, push-button, and automated setup and configuration; enhanced tax rate and tax code processing; and granular message descriptions supporting all global tax types. It also delivers enhanced data integrity for compliance reporting within Oracle Cloud ERP, along with easy-to-access transaction reporting, error handling, data mapping, maintenance, and visualization. We make the transition to Oracle Cloud ERP easy, fast and secure!

In addition, we offer e-commerce integrations and tools to accelerate online selling:

Pre-built integrations to online platforms	Pre-built integrations with traditional ERP apps	E-commerce accelerator package with simple APIs for compliant online selling	Custom APIs for additional support
<p>Shopify, Adobe Commerce, commercetools, BigCommerce, and more.</p>	<p>SAP Customer Experience & Commerce Cloud, NetSuite SuiteCommerce, Salesforce Commerce Cloud, and more.</p>	<p>Quickly manage SaaS subscriptions, gaming, music, streaming, and more.</p> <p>Supported payment providers: Paypal and Stripe or API link into checkout.</p>	<p>Embed point solutions into any online system for compliant tax calculation, invoicing, VAT ID validation, certificate management, and e-invoicing.</p>



Vertex O Series Add-Ons for U.S. Address Accuracy

Vertex O Series Address Cleansing & Latitude / Longitude Jurisdiction Locator

U.S. tax rates and rules don't just vary by state—they can change from one street to the next across 12,000+ individual taxing jurisdictions. That's why address accuracy is critical for proper tax determination. Incomplete or incorrect addresses can lead to misapplied rates and exemptions, as well as compliance risks—issues that multiply as your business grows.

To help you have even greater jurisdictional accuracy in the U.S., we offer two add-on solutions* to Vertex O Series.

Solution	Vertex O Series Address Cleansing	Vertex O Series Latitude / Longitude Jurisdiction Locator
What it does and why it's helpful	Corrects data issues sent from the source system to improve tax jurisdiction assignment for tax calculation. It uses USPS data and assigns the ZIP+4 to precisely identify the transaction location.	Determines Tax Area IDs based on U.S. latitude / longitude coordinates in real time to define a geo-location where a street address is not available. It's ideal for transactions involving cell towers, oil fields, and pop-up shops.
Key features	You can either add real-time** address cleansing to the Vertex O Series tax engine OR cleanse address files in batches outside your O Series tax engine to improve master data in your source system.	If your source application doesn't support lat / long, you can manually enter or import coordinates from another tool into Vertex O Series.
Benefits	<ul style="list-style-type: none">• Reduces risk with more precise addresses.• Improves jurisdiction assignment for tax calculation.• Improves tax accuracy for complex transaction locations.	

*These solutions are for U.S. transactions only. **Real-time address cleansing built into O Series cloud license.



Vertex O Series Add-On for VAT ID Validation



Vertex Validator

In some countries, B2B sellers must validate the buyer's VAT ID number before proceeding with the transaction. It's also required for applying the reverse charge mechanism when needed. But validating VAT IDs manually can be a slow, resource-draining process. As compliance demands increase, so does the risk of errors, missed validations, and potential penalties. To help you stay compliant without the headache, we've made VAT ID validation seamless and automated.

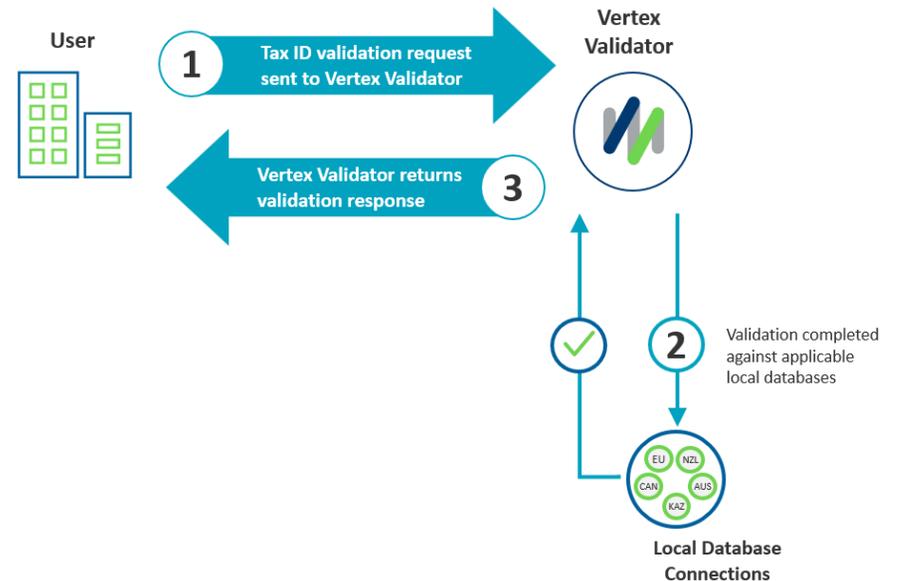
[Vertex Validator](#) automates the validation of business tax IDs to mitigate risk in transacting with a vendor or a customer or complying with the regulatory requirements.

With Vertex Validator you can:

- Conduct the tax ID validation at the most ideal point in your sales journey.
- Properly assess VAT.
- Align tax codes for B2B e-invoicing, reporting, and more.
- Streamline customer and vendor management.
- Help detect fraud at exchange.
- Support audit readiness with ease.

Key Features:

- Supports VAT IDs in 65+ countries.
- Supports single transaction validation, recurring transactions, or bulk validation.
- API integrates seamlessly with existing ERP, CRM, e-commerce, marketplace, or online platforms.
- Provides reports to manage customer tax IDs and support audits.



Need global invoicing help? [Vertex Invoice IQ](#) generates tax-compliant invoices customized to local regulations, languages, and currencies across 70+ countries—perfect if you have localized needs beyond standard ERP invoicing.



Vertex O Series Add-On for Exemption Certificate Management

Vertex Certificate Center and Certificate Service

Missing or incorrectly applied exemption certificates puts businesses at risk for audits and penalties and can negatively impact customer relationships when tax is not accurate. Finding and applying the right exemptions in the right locations at the right levels when you need it is time-consuming, and manual processes often create gaps in compliance or hard to manage processes. On top of that, limited reporting, and the ability to quickly email customers, internal stakeholders, or auditors with the correct information makes inquiries and audit preparation even more stressful.

Our solution, [Vertex Certificate Center](#), automates the collection, validation, application, storage, updating, and communication of sales tax exemption certificates through a single access point across legal entities.

With Vertex Certificate Center you can:

- Gain access to a large form library with built in validation to expedite the collection and approval of certificates according to regulation.
- Gather, create, and synch audit-ready certificate records directly into Vertex O Series for real-time tax determination.
- Set up continual monitoring and schedule communication for soon-to-expire certificates.
- Store all customer exemptions and your company exemptions in a single location with easy look-up, including image transfer tools.
- Run a report of expiring certificates and generate email/letter requests for new certificates.

Vertex Certificate Center also has a self-service certificate wizard which allows your customers to quickly generate and submit certificates from any device through a guided online process.



Don't want to manage exemption certificate renewals? With [Vertex Certificate Service](#), our team will validate new certificates and contact customers to update expiring ones.



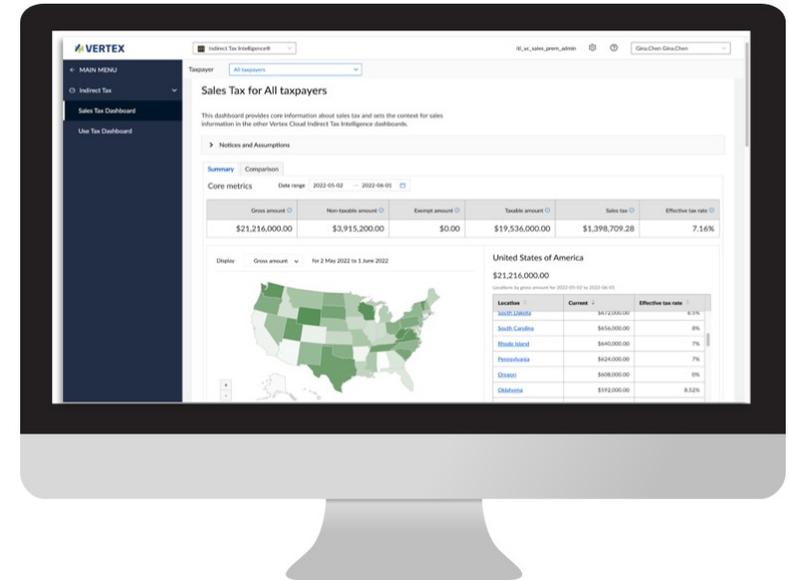
Vertex O Series Add-On for Data Intelligence

Vertex Indirect Tax Intelligence

When surveyed, tax professionals consistently rank complex tax reporting as one of their biggest challenges. Without the right tools, ensuring accurate filings, tracking tax performance, and proactively identifying risks becomes a daunting task. That's why we designed a solution that transforms your data into actionable insights—empowering tax teams to improve compliance and optimize tax engine performance.

Vertex Indirect Tax Intelligence* is a cloud-based data visualization and risk management tool that provides your tax team with data-driven, actionable insight to help you improve calculation engine configuration, data quality, tax performance, and compliance.

The solution combines O Series transaction and configuration data with Vertex tax content (i.e., rates and product rules) to deliver a series of dashboards with summary views and easy drill-down capability to support compliance, audit, and transaction review.



Vertex Indirect Tax Intelligence includes:

- **Indirect Tax Dashboards (Sales Tax & Use Tax):** Track sales and use tax activities with state-by-state summaries, filtering, and drilldown options to analyze trends and variances.
- **Economic Nexus Dashboard:** Monitor transaction volumes against state nexus thresholds to anticipate registration and reporting needs.
- **Audit Risk Dashboard:** Identify audit risks by tracking data variances, new business activities, and changes in tax amounts across jurisdictions.
- **Accuracy Risk Dashboards (Sales Tax & Use Tax):** Assess tax rate changes and legislative updates to ensure more accurate tax engine configurations and minimize exposure.
- **Configuration Risk Dashboard:** Detect potential risks from outdated tax engine settings or changes in ERP master data.
- **Completeness Risk Dashboard:** Reconcile ERP transactions with tax engine data to help ensure comprehensive tax coverage and accuracy.

*This solution supports sales use tax and consumer use tax only. It is also only available via O Series Cloud.



Report, Comply, Pay, and File

Translating tax calculations into compliant reporting is never easy. Manually managing monthly returns, yearly compliance reporting, or real-time e-invoicing without automated compliance solutions can feel overwhelming. It increases audit risks due to accuracy issues and creates a heavy burden during peak filing each month or in real-time with emerging e-invoicing mandates. And instead of focusing on more strategic tasks, your tax staff are bogged down with administrative work. On top of that, you're constantly under pressure to stay on top of changing compliance standards, forms, filing requirements, and e-file formats.





Vertex Solutions for Sales and Use Tax Compliance

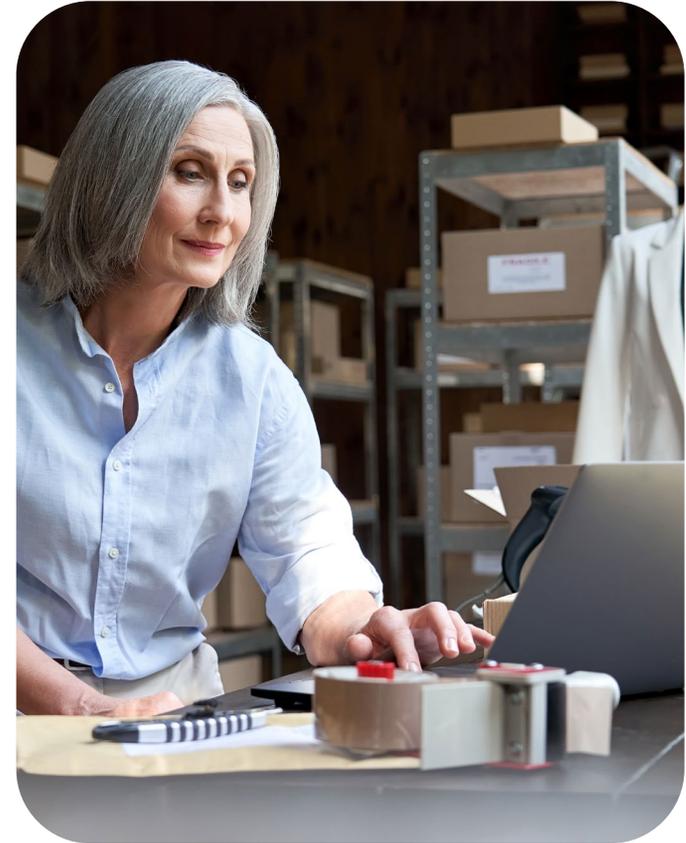
Vertex Indirect Tax Returns – North America, Express Returns, and Sales and Use Tax Compliance Service

Our solution, [Vertex Indirect Tax Returns – North America](#), generates signature-ready returns for U.S. sales and use tax and Canada sales tax, VAT, and GST.

With Vertex Indirect Tax Returns – North America you can:

- Access 1,400+ return forms for US, DC, PR (and e-files for 38 states) and Canada.
- Automate e-file preparation, transmission, ACH debit remittance, and acknowledgement receipts for CA and IL direct transmission.
- Automate workflow, calendar, and document management tools.
- Generate 100+ standard reports, or leverage data to create custom reporting.
- Generate, send, and track payment requests with full general ledger coding.

For O Series Cloud users, we offer one-click, signature ready returns through [Vertex Express Returns](#).



Want to outsource returns? [Vertex Sales and Use Tax Compliance Service](#) provides return generation, filing, and remittance all with complete transparency and control from a secure online portal.



Vertex Solutions for VAT/GST Compliance



Vertex e-Invoicing and VAT Compliance

Reporting and remitting value added tax is a complex process. Managing this without a centralized solution creates additional inefficiencies and risks. Yesterday, tax authorities were content with “periodic” reporting—where businesses filed returns and remittance monthly—and reported quarterly or yearly. Today, tax authorities in an increasing number of countries are mandating real-time reporting—a direct data transmission from the company’s source systems. The requirements are more complex, the timing in some markets is collapsed, but, as always, accuracy is paramount. For these reasons, we also offer solutions for end-to-end VAT reporting.

Solution	Vertex e-Invoicing	Vertex VAT Compliance
What it does and why it's helpful	Allows you to create, submit, clear, validate, track, and archive e-invoices worldwide which enables global organizations to comply with multiple local e-invoicing mandates using a single solution.	Automates VAT/GST e-reporting and periodic returns and reporting. This allows you to centralize multi-country compliance within a single solution.
Key features	<ul style="list-style-type: none"> • Support AR & AP processes and multiple invoice types. • e-Invoice creation, validation, submission & clearance on Peppol and/or other relevant jurisdictional portals. • Utilize a single, secure gateway to share data and supporting artifacts to/from the ERP source systems (options: API, SFTP, Prebuilt connectors). • Check for discrepancies between VAT & GST return data (including ESL reports) and e-invoicing data via integrated reconciliation between Vertex e-Invoicing and Vertex VAT Compliance. • Monitor and track AP & AR e-invoice status, download archived, and approve e-invoices with signature files and related artifacts. 	<ul style="list-style-type: none"> • Import tax data files from multiple sources. • Generate signature-ready multi-language VAT/GST returns and filing reports for 56 countries; e-file formats for 23 countries. • Reconcile VAT return data against data from ERPs, including GL, ESL reports, and Vertex e-Invoicing. • Perform data quality checks and data enhancements prior to return filing.
Benefits	<ul style="list-style-type: none"> • Centralizes global e-invoicing in a single solution. • Supports global continuous transaction control. • Supports digital reporting requirements. 	<ul style="list-style-type: none"> • Enables multi-national corporations to support business growth without additional VAT/GST process burden. • Supports aggregated and consolidated reporting. • Supports SAF-T, UK MTD, and real-time reporting for Spain SII and Hungary RTR. • Supports 2021 EU VAT e-Commerce regulations.
Integrations	<ul style="list-style-type: none"> • SAP and Oracle • API for AR/AP bidirectional data transmission • SFTP 	<ul style="list-style-type: none"> • SAP, Oracle, NetSuite, Microsoft, and Workday • Import/Export utility for quick connection to multiple sources



Vertex Solutions for VAT/GST Compliance *(continued)*

Vertex VAT Compliance Service

For businesses who prefer not to handle VAT periodic reporting in-house, we offer a VAT compliance outsourcing service.

Solution	<u>Vertex Compliance Service</u>
What it is	We manage global VAT & GST registration, returns, and remittance for you.
Key features	<ul style="list-style-type: none">• Secure online portal for easy data upload and approvals.• Registrations to tax authorities in relevant countries, where needed.• VAT/GST periodic returns and reports generated in local languages and in compliance with jurisdiction-specific regulations across Europe, Asia Pacific, and other regions.• Filing and remittance to all local jurisdictions, with complete payment visibility.• Centralized dashboard for real-time visibility into returns filed, due dates, and tax liabilities across regions.
Benefits	<ul style="list-style-type: none">• Eliminates the administrative burden of periodic filings.• Reduces the need for in-house tax expertise and cuts costs tied to complex compliance.• Minimizes non-compliance penalties.• Reduces FX exposure.• Provides complete visibility and control of the outsourced process.• Avoids hidden costs and conflicting interest by using Vertex as a single, multi-country vendor.• Allows for more time back in your day to focus on strategic priorities.





Retain, Defend, and Plan

We understand that tax compliance doesn't end once returns are filed. You're constantly navigating the audit cycle and need reliable data to support your tax position. One of the biggest reasons to automate tax processes is to ensure you have the necessary historical data and documentation for audit defense.

That's why the solutions we've developed include robust reporting functionality and document storage (where it makes sense), giving you quick and easy access to the data, certificates, forms, and reports you need. Whether you're preparing for an audit, answering customer or vendor inquiries, reconciling books, or proactively managing tax liability across jurisdictions, our tools help you stay ready and in control.





Support and Optimization

Our commitment to customer support and ongoing system optimization services are designed to provide you with the expertise and resources you need to maximize the value of your tax technology investment.



Ongoing Customer Support

Including Vertex Copilot*

- We provide expert support through our Customer Success organization, part of our Customer Center of Excellence.
- We are the only tax technology provider to earn [HDI Support Center Certification](#), underscoring our commitment to superior customer service.
- We have been recognized with the [IDC SaaS Customer Satisfaction Award](#) for Tax three years in a row—leading in customer satisfaction for SaaS tax solutions.
- We also offer a range of [support resources](#), including:
 - **Vertex Copilot:** A conversational assistant (chatbot-like), that lets users access thousands of product articles, release notes, and other documentation
 - User groups
 - Our annual conference, [Vertex Exchange](#)
 - Extensive training options



*Copilot is only available via O Series Cloud.





Premium Support

All Vertex solutions include our ongoing support services. However, through our Gold or Silver Support package you can access premium support services to help you resolve issues faster and realize greater value from Vertex.

Support Package	Gold	Silver	Standard
Premium Access & Response			
Assigned Customer Success Account Manager (CSAM)	✓	✓	
Enhanced response times	✓	✓	
Access to elevated Support Analysts	✓	✓	
24/7 Access to Support	✓		
Access to Professional Services			
Monthly bank of hours providing access to assistance for testing, configuration, tax rule setup, connector-related issues	✓	✓	
Customer Enablement			
Access to certification courses on Vertex University	4/year	2/year	
Free passes to Vertex Exchange. Multi-attendee discount for additional passes.	2 passes	1 pass	
Phone/Email Support			
HDI-certified support analysts available by phone or email.	✓	✓	✓
24/7 Self-Service Support			
24/7 access to Vertex Community customer portal with searchable database of articles, product documentation, Support Ticket logging & tracking.	✓	✓	✓



Global Professional Services

As your business grows, so do your tax technology needs. Our [Global Professional Services team](#) can help you:

- Add a Vertex integration to a new ERP, e-commerce, or financial system.
- Implement new regions and content for global expansion.
- Work through requirements for new products, lines of business, business processes, or legal entities.
- Add software to further automate and streamline the compliance function.

No matter how you're growing, we can help set up your tax engine to scale and increase commercial compliance control.

Additional offerings from our Global Professional Services team include:

- **[Vertex System Health Check Service:](#)** An analysis of your Vertex solution which includes recommendations on how to optimize configuration and deployment based on your current tax policies.
- **[Vertex Staff Augmentation Service:](#)** A dedicated Vertex representative will help you with troubleshooting, system maintenance, education, and more.

Examples include:

- Knowledge of which product upgrades and patches might affect your business
- Maintenance of your O Series environment with additional companies, customers, products, and complex rules
- Troubleshooting in the live production environment, and more

Short (10, 15, or 20 hours for a 30-day period) or long-term (6-12 month) options are available.





Contact Us

Managing indirect tax effectively requires more than just addressing individual steps—it demands an end-to-end approach that helps to ensure accuracy, efficiency, and compliance across the entire tax lifecycle. From determination and calculating, to reporting and filing, each step plays a crucial role in mitigating risk and optimizing tax operations. Our end-to-end portfolio provides automation to support every stage, empowering you to navigate business operations and support growth with confidence.

For more information regarding our portfolio of products and services, please [contact us](#).

North America

Latin America

Europe

Asia Pacific



VertexInc.com



Copyright © 2025 Vertex, Inc. All rights reserved. The information contained herein is intended for information purposes only, may change at any time in the future, and is not legal or tax advice. Any product direction and potential roadmap information is not a guarantee, may not be incorporated into any contract, and is not a commitment to deliver any material, code, or functionality. This information should not be relied upon in making purchasing, legal, or tax decisions. The development, release, and timing of any features or functionality described for Vertex's products remains at the sole discretion of Vertex, Inc. Any statements in this release that are not historical facts are forward-looking statements as defined in the U.S. Private Securities Litigation Reform Act of 1995. All forward-looking statements are subject to various risks and uncertainties described in Vertex's filings with the US Securities and Exchange Commission (SEC) that could cause actual results to differ materially from expectations. Vertex cautions readers not to place undue reliance on these forward-looking statements which Vertex has no obligation to update and which speak only as of their dates.