

# Accelerate Tax in Microsoft Dynamics 365

Trusted Microsoft partner  
since 2009

Microsoft ISV Connect Partner  
and Co-Sell Ready Partner

Over 60% of  
Fortune 500 run Vertex

ISV Success  
Microsoft  
Partner



## Global Indirect Tax Solutions Across the Microsoft Ecosystem



Manufacturing  
**91%**  
of Fortune 500

Tech/Software  
**78%**  
of Fortune 500

Telecom  
**90%**  
of Fortune 500

Oil & Gas  
**57%**  
of Fortune 500

Wholesale  
**86%**  
of Fortune 500

Retail  
**63%**  
of Fortune 500

Financial Services  
**82%**  
of Fortune 500

Business Services  
**75%**  
of Fortune 500

## 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
- Exemption certificate management
- Nexus threshold monitoring
- Registration validation
- Address cleansing
- Billing accuracy
- Data Insight
- Multi-connector support
- SaaS, Private Hosting, On-Premise options
- Hybrid cloud with fully orchestrated edge deployments
- Secure, with high availability



### 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

**"Vertex is a great ISV partner supporting D365 customers with its world-class indirect tax solutions"**

- Gavriella Schuster CVP, Microsoft, One Commercial Partner



# Tax Determination for Microsoft Dynamics D365 Finance & Supply Chain Management

## At a Glance

### Tax Determination for Microsoft D365 FSC

#### Major Tax Types

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

#### Vertex Deployment Options

- Cloud (SaaS)
- Hybrid cloud, Edge
- On-Demand cloud
- On-premise

#### 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
- VAT reg ID validation
- Nexus threshold tracking
- Currency conversion
- Custom taxability setup
- Structured tax data
- Compliance-ready data
- Audit reporting

## Automated Global Determination

The Vertex tax determination solution provides a globally accessible tax framework for Microsoft D365 organizations - reliable, efficient, scalable, and secure tax determination.

- Global tax rates, legislative, and jurisdiction changes automatically updated and maintained
- Multi-jurisdictions, multi-channels, multiple source system support
- 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.
- 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

Vertex's embedded integration for Microsoft Dynamics 365 FSC is co-developed with Microsoft's Globalization Studio team, delivering faster time-to-value through prebuilt connectors and Microsoft-validated APIs. Our solution evaluates 100+ data elements per transaction to help ensure precise tax determination globally, localized across multiple tax regimes including VAT, SUT, CUT, GST. Tax logic is embedded across Procure-to-Pay (PtP) and Order-to-Cash (OtC) processes—covering procurement, sales, project management, accounts payable, and commerce tools like MPOS/CPOS and ecommerce—ensuring language-agnostic, scalable, and audit-ready business data for invoicing, payment, billing, and compliance across the entire supply chain.

## Continuous Compliance Control

Integrating Vertex to Microsoft D365 Finance & Supply Chain Management not only improves tax determination on every transaction but centralizes and structures tax data across sales and procurement. It supports downstream tax processes, improving localized invoicing, e-invoicing, reconciliation, compliance/reporting, and audit performance.

## Embedded Tax Accuracy in Microsoft D365 FSC

### Procurement & Accounts Payable

- Purchase Requisitions
- Purchase Orders
- Purchase Invoices
- Invoice Journal
- Invoice Register

### Project Mgt & Accounting

- Sales Orders
- Project Quotations
- Expense Journal
- Hour Journal
- Fee Journal
- Item Journal
- Invoice Proposals

### Sales & Marketing

- Sales Quotations
- Sales Orders
- Return Orders
- Invoices

### Accounts Receivable

- Sales Quotes
- Sales Orders
- Free Text Invoices
- Credit Memos
- Invoices

### Commerce

- MPOS or CPOS
- Store Commerce App
- Ecommerce (online stores)
- Failover



# Tax Compliance for Microsoft D365 Finance & Supply Chain Management

## At a Glance

### Tax Compliance for Microsoft D365 FSC

#### Capabilities

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

#### Pre-built Integrations

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

#### 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

Vertex provides Microsoft multi-national users with a single, integrated, cloud platform to streamline multi-system compliance for periodic returns 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 Returns & Reporting

- 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 including ECSLs, Intrastat, Ledgers, SAF-T, UK MTD, e-Invoice creation, validation, submission & clearance (including Peppol)
- Automated VAT returns preparation 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 Microsoft GL
- Compliant data integrity checks, streamlined workflows, and audit defense reporting and document archiving
- Outsourcing option for global VAT/GST periodic filing

## Continuous Transaction Control

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

- Collect the right data from your ERPs for each reporting requirement
- Ensure invoice or billing docs are signed, cleared, reported, and returned
- Ensure local 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.

## Compliance Integrations

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

