VERTEX®

salesforce

Accelerate tax in Salesforce with Vertex

Trusted ISV partner for 7+ years

9 certified integrations

Tax solutions for 3 SFDC Clouds

150+ joint customers

available on AppExchange · salesforce

salesforce PARTNER

Integrate One Global Indirect Tax Solution Across the Salesforce Ecosystem

Revenue Cloud

- CPQ
- Billing
- Subscription Management
- Revenue Cloud* (CPQ, Contracts, Orders, Billing)

*Revenue Cloud is the next evolution of Salesforce's natively built quote-to-cash solution, launched as Revenue Lifecycle Management in February 2024.

Salesforce Core

- Sales Cloud (CRM)

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🏪 = salesforce Available on AppExchange

Commerce Cloud

- B2B Commerce
- B2C Commerce
- D2C Commerce
- Order Management
- Headless Commerce
- B2B "Limited" (Cloud Craze) *

* Product in End of Life phase by Salesforce
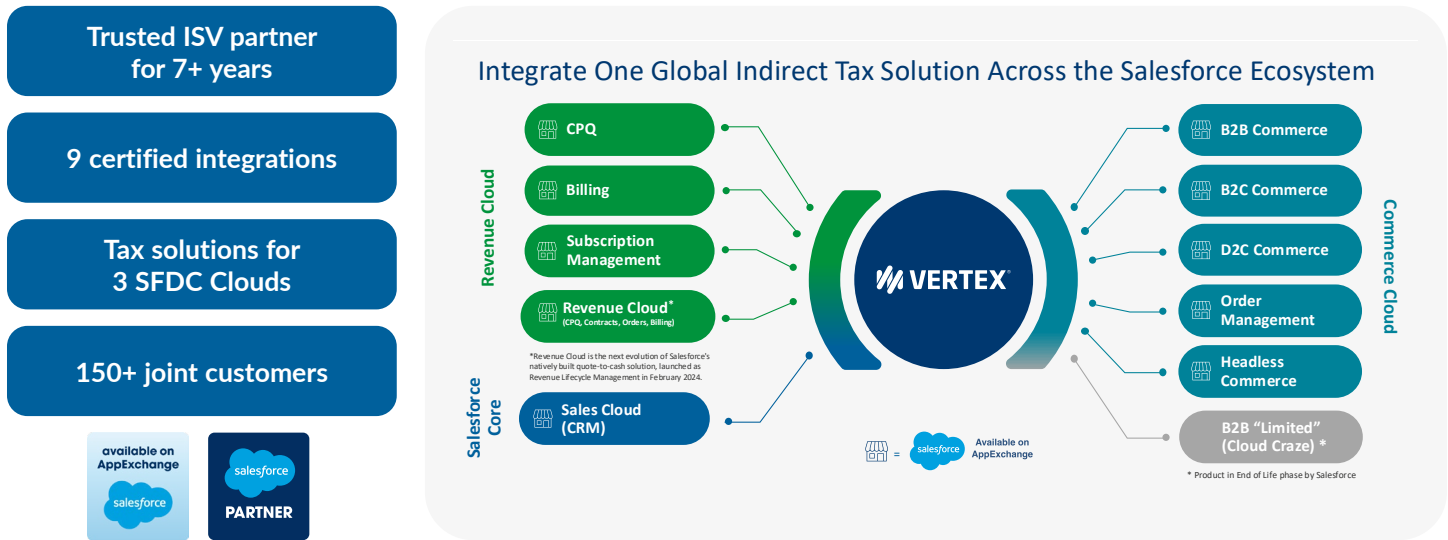
Vertex supports Headless Commerce, LOM, and LB2B

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

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Tax Determination for Salesforce *(Sales Cloud, Revenue Cloud, Commerce Cloud)*

Automated Global Determination

A Vertex tax engine provides a globally accessible tax framework - reliable, efficient, scalable, and secure tax determination for Salesforce organizations.

- Global tax rates, legislative, and jurisdiction changes are 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 audit defense and inquiries
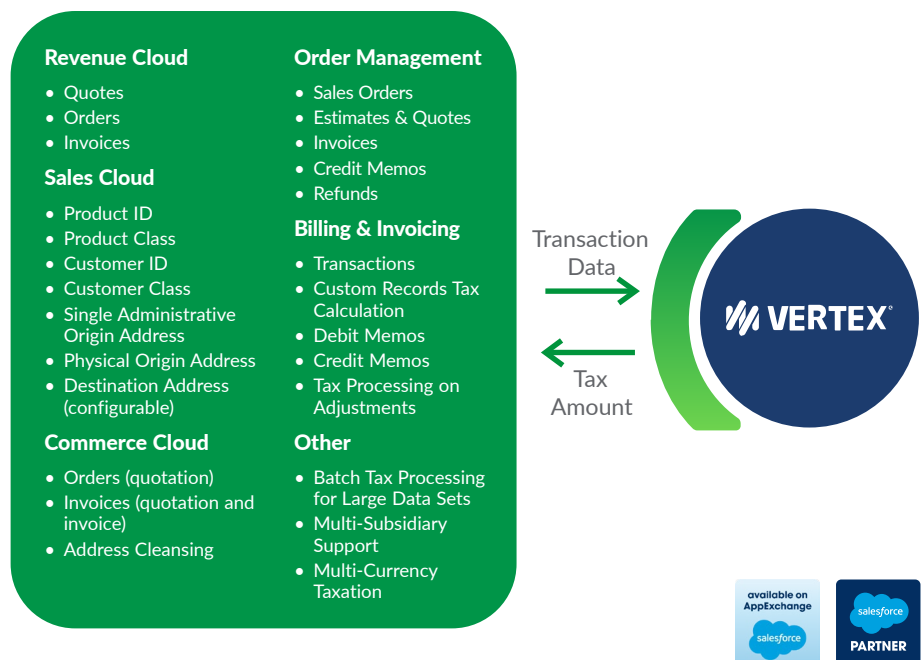- Be ready for customer inquiries and audit defense

Robust Integration

The Vertex for Salesforce integrations seamlessly connect Vertex O Series with Salesforce platforms, enabling automated and accurate tax calculations across workflows like quoting, invoicing, order processing, and billing. Vertex embeds compliant business data across processes and applications helping ensure real-time tax accuracy, jurisdictional compliance, protect margins and scale for both B2B and B2C transactions, using APIs and Lightning Experience to deliver seamless performance within Salesforce environments.

Continuous Compliance Control

Integrating Vertex into Salesforce 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 Salesforce

Revenue Cloud

- Quotes
- Orders
- Invoices

Sales Cloud

- Product ID
- Product Class
- Customer ID
- Customer Class
- Single Administrative Origin Address
- Physical Origin Address
- Destination Address (configurable)

Commerce Cloud

- Orders (quotation)
- Invoices (quotation and invoice)
- Address Cleansing

Order Management

- Sales Orders
- Estimates & Quotes
- Invoices
- Credit Memos
- Refunds

Billing & Invoicing

- Transactions
- Custom Records Tax Calculation
- Debit Memos
- Credit Memos
- Tax Processing on Adjustments

Other

- Batch Tax Processing for Large Data Sets
- Multi-Subsidiary Support
- Multi-Currency Taxation

Transaction Data →

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← Tax Amount

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Tax Compliance for Salesforce *(Sales Cloud, Revenue Cloud, Commerce Cloud)*

At a Glance
Tax Compliance for Salesforce

Capabilities
- e-Invoicing
- e-Reporting
- Periodic reporting
- Digital invoicing add-on

Prebuilt Integrations
- Integrated calc & returns

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 Salesforce multi-national users with a single, integrated, cloud platform to streamline multi-system, multi-jurisdiction compliance for periodic returns, e-invoicing, and e-reporting across the globe.

US/Canada Returns Options

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

Global, e-Invoicing and VAT Returns

- 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 creation, 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
- Standardize data, streamline workflows, and defend audits

Continuous Transaction Control

Automate, govern, and defend e-invoicing, e-reporting, and period filing:

- 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 APIs and integrated returns for Salesforce translate calculation data into compliant reporting. This saves time and drives efficiency collecting the right data, improving data accuracy, and streamlining the compliance process.