

Vertex Express Returns

Integrated compliance tool for North America

Centrally manage US and Canada calc and returns on our native SaaS platform. Add Vertex Express Returns to the Vertex O Series Cloud tax engine for a simple end-to-end cloud solution. Take advantage of a unified system to save time, reduce risk and improve tax operations.

Returns That Run Themselves

Vertex Express Returns automates monthly and periodic sales, use, and goods and services tax return preparation, delivering process efficiency and accuracy for all sales and purchasing transactions in the US and Canada.

- Automatically populate returns directly from Vertex O Series calc data to improve data transparency and preserve data quality, auditability, reporting, and control.
 - No manual data import or forms mapping.
 - Create PDF and e-files to support manual or electronic filing requirements.
 - Ensure tax data enters the most current jurisdictional forms, following all required formatting and content rules — so tax teams don't have to worry.
 - Centrally manage federal, state/provincial, and local reporting requirements for US and Canada across your org structure.
 - 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 perform audit and reconciliation across their systems.
 - Audit-ready document storage helps ensure consistency and transparency, making audit support less stressful and more efficient.
 - Reduce the time and effort required for monthly or periodic compliance, streamline the processes, and scale easily to support business expansion and growth.

Streamline Monthly Compliance

Vertex Express Returns provides an affordable, automated, user-friendly way to support the monthly and periodic sales and use tax returns process, delivering efficiency and improved processes, improved accuracy in returns and reporting, and better management to 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

O Series calc engine configurations are automatically passed to Express Returns to streamline setup and ensure consistency between systems. A configuration interface guides easy additional setup for taxpayer settings, locations, and other information required to streamline auto-preparation of returns for each registered jurisdiction.



Automated Data Transmission

No manual data uploads needed. Built-in integration allows O Series Cloud to automatically send transaction data to Express Returns to generate returns. Save time and schedule automatic import of tax data on a day and time of your choosing, or opt to manually initiate when ready.



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

Automatically and accurately maps data imported from O Series Cloud to the required return form fields based on return configurations. Returns are generated as PDF files for use with manual filing, or e-files for jurisdictions that support electronic filing. Users can enable or disable e-file generation on a return-by-return basis. Save time and schedule automatic return generation on a day and time of your choosing, or opt to manually initiate when ready.



Workflow & Tracking

Once returns are generated, streamline your review process with a centralized returns processing interface that consolidates workload and enhances efficiency. Tracks return status, due dates, and urgency in one place, and customizes views to stay organized and on-schedule for timely filings.



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.



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.

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