

Accelerate Tax in Microsoft Dynamics 365

Trusted Microsoft partner since 2009

Microsoft ISV Success Partner

IP Co-Sell Ready Solution

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
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Delivering a True Global End-to-End Tax Solution

Tax Determination

- O Series
- Cert Center
- Validator
- AI Agent

- Tax determination
- Global SUT/VAT content coverage
- 1 billion+ data driven tax rules
- AI agent-to-agent configuration monitoring and system sync
- 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

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
- AI-powered configuration agent

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
- "AI-powered sync between D365 and Vertex tax engine to auto-configure taxpayer, registration, product taxability, exemptions.
- 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, Microsoft-validated APIs, and an AI-powered configuration agent. 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



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 by collecting the right data, improving data accuracy, and streamlining the compliance process.

