

# Vertex O Series

## A Streamlined Solution for Global Tax Management

Vertex O Series is an industry-leading solution designed to automate and centralize indirect tax determination. Rich tax content and flexible deployment options paired with robust integrations to your financial systems provide a single platform for managing global indirect taxes, including sales, use, value added, communications, and leasing taxes.

### Reliable Tax Determination

Vertex O Series provides a powerful tax determination solution supporting everything from determining tax jurisdictions and maintaining an accurate rate database to calculating complex transactions. The system's robust functionality is balanced by a streamlined user interface, improving visibility and control for your tax department.

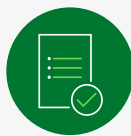
### Support Business Growth

Vertex O Series goes beyond improving the accuracy of your tax calculations by giving the tax function the agility to support business growth into new markets, products and services, and sales channels. The system gives tax departments the robust content and powerful calculation automation needed to rapidly accommodate business growth and change without increasing risk. As a result, your tax department can provide higher value to the organization.

## Benefits



Reduced audit exposure



Improved compliance



Global scalability



Centralized control



Increased productivity

## Features



### Integrated with Your Financial Systems

Vertex integrates seamlessly with your ERP, e-commerce, procurement, and other financial systems to automatically calculate tax and provide centralized control and visibility.



### Robust Tax Content

Robust tax content, updated monthly, helps ensure that the right tax is applied to every transaction. Vertex maintains sales, use, and value added tax content plus industry-specific content for communications<sup>1</sup> and leasing<sup>1</sup>.



### System Scalability

License the tax data and capabilities you need today, and add on as you expand into new markets and businesses. Provide web-based access for worldwide users. Gain centralized control of company-specific taxability, rate research, reports, and monthly content updates.



### Deployment Flexibility

Deploy the Vertex solution on-premise for maximum control, leverage the scalability of the cloud (AWS, Oracle Cloud Infrastructure, or Microsoft Azure) or create a hybrid environment that balances cost and flexibility.



### Pinpoint U.S. Jurisdiction Identification

Tools for address cleansing<sup>2</sup> and precise jurisdiction assignment (including lat/long capability) help ensure the right tax is charged for every transaction, regardless of the location.



### Custom Taxability Setup

Enjoy vastly simpler set-up of your company's unique taxability rules, exemptions, and data. This helps ensure accuracy, even if your company has multiple entities.



### Exemption Management

Integrate with the Vertex Certificate Center<sup>1</sup> to improve the accuracy of tax-exempt transactions.



### Integrated Returns

Add-on Vertex Express Returns for a directly integrated end-to-end solution for US/ Canada sales & use tax calculation and returns (available for O Series Cloud licenses only).



### Reporting

Tools designed for ease of use let you generate standard reports or leverage data to create custom reporting to support audit and enterprise tax management.



### Registration Validation

When VIES lookup isn't enough, O Series tax engine integrates with Vertex Validator<sup>1</sup> for registration validation.



### Digital Invoicing

Integrates with Vertex Invoice IQ<sup>1</sup> to support omnichannel transactions including marketplace back-to-back invoicing.



### Hybrid Cloud Options

Manage tax calculation locally by deploying O Series containers at the edge. Eliminate connectivity and latency issues, improve performance, gain flexibility and control.



### Security & Access

Role-based access enables effective control of tax processes and data visibility. Audit logs help ensure SOX compliance. Federated security and single sign-on (SSO) enhance protection and add convenience.



### Data Intelligence

Add-on<sup>3</sup> integrated tax analytic dashboards deliver near-real-time insights. Enables proactive data governance at the time of transaction and when rates change to optimize the power of O Series. (Supports SUT/CUT transactions only.)



### Intelligent access to product knowledge

Ask product questions directly in the app. The Vertex Copilot generative AI feature enables real-time responses to product questions.<sup>4</sup> The chatbot-like interface provides non-disruptive access to information in a sidebar within the current open workspace.



### Training to Accelerate ROI

Individual and team training options for new customers are designed to accelerate adoption and increase long-term success.

<sup>1</sup> This is available with an additional license and fee.

<sup>2</sup> Address Cleansing is included with new O Series Cloud licenses. It can be added to O Series On-Demand or O Series On-Premise licenses with an additional license and fee.

<sup>3</sup> Vertex Indirect Tax Intelligence is included in new Vertex O Series Cloud licenses, and can be added to new Vertex O Series On-Demand licenses for an additional fee.

<sup>4</sup> Product documentation used by Vertex Copilot has been reviewed by subject matter experts to ensure it meets our internal standards for quality and completeness. However, as a generative AI, Vertex Copilot creates responses for every question and may not always be accurate. Users should review and confirm the information provided. If users have questions about the response from Copilot, they can verify the information by reviewing the product content on Vertex Community. Links to the relevant articles used by Copilot are included with the response. AI RESPONSES ARE PROVIDED FOR INFORMATIONAL PURPOSES ONLY AND VERTEX DISCLAIMS ALL WARRANTIES, WHETHER EXPRESS, IMPLIED, STATUTORY, OR OTHERWISE WITH REGARD TO RESPONSES. GIVEN THE NATURE OF AI TECHNOLOGY, AI RESPONSES MAY BE INACCURATE, MISLEADING, AND MAY BE SUBJECT TO THIRD PARTY TERMS, INCLUDING, AS APPLICABLE, OPEN SOURCE LICENSES.

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