

# Vertex e-Invoicing

Vertex e-Invoicing enables organizations to transform their invoicing processes. It provides a single, integrated, global solution to streamline the creation, exchange, clearance, and e-archiving of e-invoices. Businesses can leverage this automated solution to remain compliant with jurisdictional mandates and requirements on a country-by-country basis.

## Streamlined global e-invoicing

Vertex e-Invoicing enables organizations to optimize real-time VAT compliance and e-invoicing processes implementing continuous transaction control and supporting digital reporting requirements. It's an end-to-end solution designed to streamline the entire e-invoicing process including validation, creation, submission, clearance, and e-archiving of e-invoices in compliance with jurisdictional mandates for B2B/B2G transactions.

Seamlessly connecting with source financial systems and invoice clearance platforms, Vertex e-Invoicing streamlines e-invoicing for both Accounts Receivable (AR) and Accounts Payable (AP) transactions, while providing maximum visibility and control. With continually updated content, Vertex e-Invoicing enables companies to stay compliant with current and emerging local digital VAT regulations (including EU proposed VIDA).

## Immediate & Long-Term Benefits

Implementing Vertex e-Invoicing delivers immediate and long-term benefits to multi-national businesses including:

- Automated e-invoicing processes to enhance indirect tax compliance
- Multi-country coverage easily expanded as new VAT mandates emerge

- Creation, validation, submission, clearance and e-archiving of approved e-invoices
- Support for Accounts Receivable and Accounts Payable processes for B2B & B2G transactions
- Single gateway to speed clearance and response to you, your accounting systems, and your customers
- Secure, cloud-based solution delivering reduced costs year-over-year and easy data archival/retrieval
- Continuous compliance delivering operational efficiency
- Better cashflow management, with low Days Sales Outstanding (DSO) and high return on investment (ROI)
- Environmental gains from eliminating paper invoicing
- Part of a consolidated platform supporting real-time e-invoicing and periodic VAT reporting, compliance, and reconciliation

## End to End VAT Compliance

Vertex e-Invoicing provides scalable and streamlined e-invoice management, seamless integration to financial systems, and global country coverage. The solution is part of an end-to-end VAT compliance suite for multi-nationals that includes data transmission, VAT ID registration, tax determination, compliant traditional invoicing, e-invoicing, e-reporting and periodic reporting, and returns.

## Benefits



Increased Productivity & Efficiency



Reduced Risk, Time, & Money



End-to-End Multi-Country Solution



Supports Latest Local Mandates



Integrated with VAT Compliance

## Features

- **AR & AP Supported**

End-to-end e-invoicing solution supports Accounts Receivable (AR) and Accounts Payable (AP).

- **Flexible Data Transmission**

Vertex pre-built ERP connectors and API options for flexible data transmission. Vertex Universal Standard (VRBL) streamlines source data transmission, validation, jurisdiction-specific format/language conversion, self-billing, and post-clearance reporting. If your ERP is unable to natively generate in VRBL format, Vertex can support ingestion of various non-VRBL invoice formats (e.g., SAP IDoc, Oracle CXML, CSV) to simplify integration and onboarding.

- **e-Invoice Creation**

Create e-invoices from data and artifacts from your source transaction systems, formatted to meet specific jurisdictional specifications.

- **e-Invoice Validation**

Validate e-invoice data and artifacts to identify any missing or non-compliant information, prior to tax authority submission/reporting.

- **e-Invoice Submission & Clearance**

Single access point to submit e-invoices and artifacts to Peppol<sup>1</sup> and/or relevant jurisdictional portals, receive status/clearance notifications, and approved e-invoices with signature file.

- **Real-time Invoice Monitoring and Notifications**

Streamlined process to authorize, track and monitor all relevant jurisdictional portals for approved and/or cleared invoices to be paid, including self-billing scenarios. Receive real-time AP/AR invoice alerts with admin-configurable triggers, destinations, and detail—automating workflows and reducing manual effort. Notifications may be delivered via the system interface, email, or both, depending on user preferences.

- **AP & AR Dashboards**

Role-based AP & AR views allow users to easily monitor and track completed and transmitted invoices, and download archived approved/cleared e-invoices with signature files and related artifacts.

- **Email Alerts**

AP/AR users can tailor role-specific email notifications (near-real-time alerts or scheduled summaries) to receive critical e-invoicing events and status changes including processing errors, new inbound invoices, and other key updates.

- **Archive**

Approved or cleared e-invoices, with added jurisdictional digital signatures, are electronically archived and stored along with relevant and required supporting artifacts for audit readiness and data retention compliance (up to 15 years), based on jurisdictional requirements.

- **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>2</sup> The chatbot-like interface provides non-disruptive access to information in a sidebar within the current open workspace.

- **Latest e-Invoicing Content**

e-Invoice content is continually updated as regulations and requirements change across jurisdictions, to keep companies compliant. Supports the details of e-invoicing requirements for each country, such as invoice format, data fields, submission methods, and timelines.

## Consolidation

- **Metrics and Monitoring Dashboard**

A centralized, metrics-driven view provides the administrator with full visibility and operational oversight of all invoice processing activity across countries, entities, and document flows. Monitor AP & AR processing volumes, success rates, and trends over time, supporting compliance monitoring and faster issue detection.

- **Messages**

Provides the administrator with a centralized view of all invoice-related communications, delivering full visibility into the lifecycle of AR, AP, and non-invoice messages. Real time status tracking, detailed message information, and advanced filtering to quickly navigate high volume activity, support compliance monitoring, and faster detection of issues or anomalies.

- **Periodic Reporting Add-On**

Option to add-on Vertex VAT Compliance for periodic reporting, enabling users to manage all VAT compliance reporting needs in a single, integrated platform.

- **Reconciliation**

Integrated reconciliation between Vertex e-Invoicing and Vertex VAT Compliance provides a convenient way to check for discrepancies between VAT & GST return data (including ESL reports) and e-invoicing data.

- **Single Platform**

Easily toggle between Vertex e-Invoicing and Vertex VAT Compliance applications for comprehensive visibility of real-time and periodic reporting.

- **Secure End-to-End e-Invoice Protection**

Fully encrypted, end-to-end, secure channel for e-invoicing data transmission, ensuring all information remains protected from source system to destination through a single, authenticated entry point, safeguarding against cyber threats and fraudulent manipulation.

- **End-to-End VAT Compliance**

Cloud-based end-to-end VAT platform provides a single user interface and shared dashboard to manage global VAT compliance – including data transmission, VAT ID registration, tax determination, compliant traditional invoicing, e-invoicing, e-reporting and periodic reporting.

<sup>1</sup> Peppol is an e-procurement network allowing businesses to securely exchange electronic documents, like invoices and purchase orders, using standardized formats and protocols.

<sup>2</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.

