



Improve Sales and Use Tax Compliance with Vertex

Vertex offers a proven and accurate sales and use tax solution for businesses. Our scalable solution allows customers to manage complex sales and use taxes across multiple jurisdictions and states. Vertex offers multiple deployment options to best fit customers needs.

Vertex provides tax calculations and returns in one comprehensive solution, resulting in signature-ready PDF returns at no additional charge.

With Vertex, your tax rates and rules are always up-to-date and the tools you need to generate and file accurate and timely returns are just a click away. You will no longer have to keep tax rates up-to-date manually, determine what is taxable in different jurisdictions, or maintain a myriad of tax codes.

Automatic Posting of Sales Tax Data

When you process your invoice in Dynamics 365 for Finance and Operations, your tax data is automatically posted to

Vertex. You can login into Vertex to see tax details at any time. When it's time to file a return, you can print signature-ready PDFs in Vertex thereby eliminating the tedious process of extracting and importing data into other software, or have Vertex file the return and remit payment on your behalf. It is that simple.

Gain Complete Business Process Support

Quickly install, configure, and enable the connector. Vertex overrides the native Dynamics 365 for Finance and Operations tax calculation functionality to:

- Provide access to centralized sales tax data or maintain the tax data in your own environment.
- Maintain exemption certificates.
- Generate signature-ready PDF returns.

Features of Vertex Cloud Sales and Use Tax Automation

Everything your business needs to manage sales and use tax and pay only for what you use. It's that simple.

Rate files — Download rate files by location or upload addresses for your specific business needs and access tax rate files. Jurisdiction tax amounts are continuously researched and updated, maintaining our tax content to keep you current.

Calculations and returns in one solution

— Perform tax calculations and generate signature-ready PDF returns in one solution. With Vertex, there is no need to access separate applications for tax calculations and returns. Our innovative interface guides you through a confirmation process that allows you to personalize the taxability to make it as simple or complex as you need. With calculations and returns in sync, signature-ready PDF returns are automatically generated for you for each relevant time period.

Returns only — Upload tax data files from any data source and generate signature-ready PDF returns. No matter the source of your data, you can use our returns only offering for your or your clients' businesses. File and remit payment for the returns yourself, or allow Vertex to file and remit payment for you.

Exemption certificate management

— Store, update, and maintain your exemption certificate. Efficiently manage your exemption processes with Vertex. You have the flexibility to bulk upload exemption certificates or upload them one at a time, set effective and expiration dates, store the certificates and manage customer exemptions with our solution and within your Dynamics 365 for Finance and Operations.

Consumer use tax — Calculate and report your consumer use tax. Consumer use tax can be complicated, with various scenarios triggering a requirement for the tax. Vertex enables you to calculate and report your consumer use tax, including for accruals, asset and goods management, inventory removal, and purchase orders.

Returns Outsourcing

Outsource your returns and Vertex will file and remit on your behalf. Vertex ensures returns are paid and filed on time, every time

Leverage the Most Robust Tax Content and Infrastructure in the Industry

- Reduced time and effort to perform sales and use tax calculations
- Greater accuracy of returns and compliance data
- Faster user adoption with anytime, anywhere accessibility
- Improved scalability to meet changing sales and use tax requirements
- Lower total cost of ownership and fast time-to-value with cloud integration

To install the sales tax extension for Vertex go to the AppSource for Dynamics 365 for Finance and Operations.

For a demonstration,
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