## Microsoft Dynamics 365 RETAIL

Available in three deployments, Cloud (multi-tenant), On-Demand (single tenant), and On-Premise for reliable taxation and ease of use. This guide provides instructions for using the Vertex tax engine with the following Microsoft Dynamics 365 Finance and Operations modules:

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| Address Cleansing | CustomerPre-Tax Calculation |
| Retail | Point of SaleeCommerceFailover |
| Sales and Marketing Module | Sales OrderInvoiceReturns |

## Components

The Vertex Tax Links setup uses the following components to automate address validation (also known as address cleansing) and sales tax calculation:

* **Microsoft Dynamics 365** – An application that automates your ERP processes.
* **Vertex Tax Links for D365 Finance and Operations** – A connector that links your Dynamics 365 Finance and Operations with the Vertex Cloud or Vertex O Series tax engine.
* **Vertex O Series** – A tax engine that validates ship-to addresses and calculates sales tax (powers the Vertex Cloud)
* **Vertex Cloud** – A portal to the Vertex O Series tax engine. Vertex Cloud provides an interface for configuring the registrations, products, categories, and customer exceptions that support the Vertex O Series tax engine.



* Sales transactions created in your eCommerce or POS system can be configured to use Vertex to cleanse addresses and calculate tax in the Retail module
* The O Series tax engine cleanses the ship-to address, calculates the sales tax, and sends an XML response message back through Tax Links to the Retail module.
* Address Cleansing is provided by the Vertex integration, as a correct address is critical in ensuring the correct tax jurisdiction is used in calculating the appropriate sales or use tax. This is not a batch or one-time feature.
* Retail sales transactions can be uploaded to D365 Finance and Operations via a custom Vertex batch process delivered as part of Tax Links for Microsoft D365 for Retail
* Uploaded retail transactions create a sales order and invoice either by sales transactions or in aggregate by session
* Invoiced retail transactions reflect posted sales tax by product and jurisdiction
* Last run our custom distribution batch job that posts the invoiced tax details to Vertex’s tax journals for future tax return preparation; you can file your own returns or Vertex can provide the service for you

## Supported Versions

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| --- | --- |
| **D365 Retail** | * D365 Retail 8.0, 8.1
* D365 Finance and Operations 8.0, 8.1
* Separate Licenses (Both Tax Links for D365 Finance and Operations and Tax Links for D365 Retail are required)
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