



Vertex Tax Links for Microsoft Dynamics 365 Business Central

Improve Sales Tax Compliance with Vertex

With Vertex, your sales 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.

Deploy a Powerful Tax Engine

Vertex offers a standard connector to Microsoft Dynamics 365 Business Central. After installing the connector, you can follow a few simple steps to link to the solution and configure your setup. Then you can quickly begin using intuitive, online tools to support everything from performing tax calculations to generating signature-ready PDF returns.

Vertex runs the data you enter into Microsoft Dynamics 365 Business Central through the Vertex tax engine to determine what is taxable or exempt. It provides address validation across your applications to enable more accurate taxation and shipping processes. Vertex keeps track of taxable items, maintains transaction detail, and documents which taxes were or were not charged. At the end of the month, you can generate reports in Microsoft Dynamics 365 Business Central and Vertex to reconcile your accounts. You can also file taxes using signature-ready PDF returns.

Realize a Quick Deployment

When integrated with Microsoft Dynamics 365 Business Central, Vertex enables the cost and agility benefits minimizing the cost and complexity of your solution landscape. Secure access is enforced by Vertex so you can rest easy knowing your data is safe.

Powerful Benefits

Leverage the most robust tax content and infrastructure in the industry with Vertex to realize the following business benefits:

- + Reduced time and effort to perform sales tax calculations.
- + Greater accuracy of returns and compliance data.
- + Faster user adoption with anytime, anywhere accessibility.
- + Improved scalability to meet changing sales tax requirements.
- + Lower operating costs and fast time-to-value with cloud integration through Microsoft Dynamics 365 Business Central.

Vertex Cloud Indirect Tax



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 configuration 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.



Streamlined returns

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 certificates. 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 Microsoft Dynamics 365 Business Central.

Gain Complete Business Process Support

Vertex Tax Links for Microsoft Dynamics 365 Business Central offers full support for your order entry to invoicing processes including:

- + Performs tax calculations in sales order processing documents.
- + Provides flexible USPS address validation and cleansing with options to select your address data.
- + Automatically handles the setup and maintenance of tax schedules to calculate tax with the varying rates, rules, and multiple jurisdictions.

For a demonstration, please email microsoftdynamics@vertexinc.com.

Silver
Microsoft
Partner

North America

King of Prussia, PA, USA

Latin America

São Paulo, BR

Europe

London, UK

Asia Pacific

Chennai, IN

