VERTEX®

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* and leasing*.

System Scalability

License the tax data and capabilities you need today, and add capabilities 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.

Pinpoint U.S. Jurisdiction Identification

Add-on* tools for address cleansing 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* to improve the accuracy of tax-exempt transactions.

*This is available with an additional license and fee.

Export Data for Compliance

Increase compliance accuracy with summarized transaction data for each jurisdiction.

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 for registration validation.

Digital Invoicing

Integrates with Vertex Invoice IQ to support omnichannel transactions including marketplace back-to-back invoicing.

Hybrid Cloud Deployment 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 you to control tax processes and data visibility more effectively. Audit logs help ensure SOX compliance. Federated security enhances protection. And single sign-on (SSO) improves convenience.

Data Intelligence

Add-on* 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.)

To learn more, visit VertexInc.com.

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