

# 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<sup>1</sup> and leasing<sup>1</sup>.



### System Scalability

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



### Deployment Flexibility

Deploy the Vertex solution on-premise for maximum control, leverage the scalability of the cloud, or create a hybrid environment that balances cost and flexibility.



### Pinpoint U.S. Jurisdiction Identification

Tools for address cleansing<sup>2</sup> 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<sup>1</sup> to improve the accuracy of tax-exempt transactions.



### 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<sup>1</sup> for registration validation.



### Digital Invoicing

Integrates with Vertex Invoice IQ<sup>1</sup> to support omnichannel transactions including marketplace back-to-back invoicing.



### Hybrid Cloud 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 effective control of tax processes and data visibility. Audit logs help ensure SOX compliance. Federated security and single sign-on (SSO) enhance protection and add convenience.



### Data Intelligence

Add-on<sup>3</sup> 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.)

<sup>1</sup> This is available with an additional license and fee.

<sup>2</sup> Address Cleansing is included with new O Series Cloud licenses. It can be added to O Series On-Demand or O Series On-Premise licenses with an additional license and fee.

<sup>3</sup> Vertex Indirect Tax Intelligence is included in new Vertex O Series Cloud licenses, and can be added to new Vertex O Series On-Demand licenses for an additional fee.

To learn more, visit [VertexInc.com](https://VertexInc.com).



North America | Latin America | Europe | Asia Pacific

