

# Vertex Indirect Tax Intelligence

## Data-driven, actionable insight to improve tax performance

Leverage data intelligence to mine your Vertex tax engine data and configurations for trends, indicators, and variances so you can take action sooner to improve tax performance and mitigate risk.

### Access data intelligence

The tax department utilizes some of the largest, most detailed, and diverse data sets in the company. Vertex offers a data intelligence tool to unlock time, capacity, and insight from that data to empower indirect tax departments to:

- Optimize compliance and audit performance
- Mitigate risk
- Improve tax outcomes across the business

### Get actionable insight

Vertex Indirect Tax Intelligence is a diagnostic tool for the tax function. It helps identify the tax impact of business activity to help determine how/where to best spend valuable resources.

The solution combines Vertex tax engine transaction and configuration data with Vertex tax content (i.e., rates and product rules) to deliver a series of dashboards with summary views and easy drill-down capability to support

compliance, audit, and transaction review. View, sort, and access data in new and insightful ways to identify areas for review, attention, and optimization more quickly.

### Optimize the tax compliance process

Vertex Indirect Tax Intelligence addresses the tax professional's need for:

- Access to sufficient tax data to improve accuracy and timeliness of returns
- Validation of data sources
- Consolidated view of disparate data
- Ability to proactively view, compare, and monitor trends
- Ability to proactively monitor risk that could impact, undermine, or invalidate the compliance processes
- Identification of high-risk areas to focus resources and time
- Ability to identify the effect of rate and rule changes on transaction calculations

## Benefits



Increased Efficiency



Reduced Audit Risk



Strengthened Audit Defense



Accelerated Growth

## Quickly Understand Tax Outcomes, Position, and Data Quality

Vertex Indirect Tax Intelligence provides tax and finance professionals with interactive dashboards that combine your tax and transaction data, Vertex tax content and rates, and your tax engine configurations to monitor and analyze your indirect tax metrics by entity, product, volume, amount and location. Further unlock unique views into trends, risk, and areas for review, attention, and optimization. Each dashboard includes data drilldowns and additional filtering capabilities to gain further insight from your data.

### Intelligent access to product knowledge

Accelerate implementation, onboarding, and use with Vertex Copilot. This generative AI feature enables users to ask product questions directly in the application and receive real-time responses. The chatbot-like interface provides non-disruptive access to information in a sidebar within the current open workspace.

#### Vertex Indirect Tax Intelligence Dashboards

<p><b>Indirect Tax Dashboard (Sales Tax)</b> <b>Indirect Tax Dashboard (Use Tax)</b></p>	<p>View your sales tax and use tax activities and easily identify transaction activity trends and variances over time periods and aggregated by geography. The dashboards provide a state-by-state summary of sales, purchases, taxes collected, and taxes paid for current and prior periods, with filtering and drilldown capabilities for deeper insight.</p>
<p><b>Economic Nexus Dashboard</b></p>	<p>Monitor your transaction volumes and progress toward state nexus thresholds to identify upcoming registration and reporting needs. View sales transactions and dollar volumes by-state, read from the Vertex tax engine, compared against individual state nexus thresholds.</p>
<p><b>Audit Risk Dashboard</b></p>	<p>View data variance trends and enhance audit governance. Identify potential risk, exposure, and audit-triggering events based on changes to customer and transaction data. Gain insight into new products, new selling and customer locations, M&amp;A, and variances in tax amounts for individual jurisdictions.</p>
<p><b>Accuracy Risk Dashboard (Sales Tax)</b> <b>Accuracy Risk Dashboard (Use Tax)</b></p>	<p>Monitor legislative updates and the impact on your tax engine configurations. View a curated exposure list for your business by viewing new or changing tax rates relative to your company's specific products and services. The dashboards combine Vertex monthly tax rate and rule data, tax engine transaction data, and product category mapping to highlight where rate changes impact your business so you can quickly identify risk and trends.</p>
<p><b>Configuration Risk Dashboard**</b></p>	<p>Identify transaction impact and potential risk &amp; exposure by viewing new or changing master data in your ERP or outdated configurations in your Vertex tax engine.</p>
<p><b>Completeness Risk Dashboard**</b></p>	<p>Compare and assess the completeness of coverage in your Vertex tax engine compared to your ERP transaction data for reconciliation between systems.</p>

\*\*Optional add-on. Requires ERP connectors, must use either SAP (ECC6 or S4 HANA) or Oracle (R12) and install the ERP connectors and the Universal Uploader tool in their respective ERP environment.

### Prerequisites & Notes

- Requires active subscription to Vertex O Series version SR9 or Vertex Cloud Indirect Tax
- Supports U.S. sales tax, seller's use tax, and consumer use tax transactions only.
- Requires data sharing enabled between Vertex tax engine and Vertex Indirect Tax Intelligence. Must be making invoice calls, quote calls are not supported.
- Vertex Indirect Tax Intelligence is included in new O Series Cloud licenses. Can be added to new O Series On-Demand licenses for an additional fee.

\*Note: Product documentation used by Vertex Copilot has been reviewed by subject matter experts to ensure it meets our internal standards for quality and completeness. However, as a generative AI, Vertex Copilot creates responses for every question and may not always be accurate. Users should review and confirm the information provided. If users have questions about the response from Copilot, they can verify the information by reviewing the product content on Vertex Community. Links to the relevant articles used by Copilot are included with the response. AI RESPONSES ARE PROVIDED FOR INFORMATIONAL PURPOSES ONLY AND VERTEX DISCLAIMS ALL WARRANTIES, WHETHER EXPRESS, IMPLIED, STATUTORY, OR OTHERWISE WITH REGARD TO RESPONSES. GIVEN THE NATURE OF AI TECHNOLOGY, AI RESPONSES MAY BE INACCURATE, MISLEADING, AND MAY BE SUBJECT TO THIRD PARTY TERMS, INCLUDING, AS APPLICABLE, OPEN SOURCE LICENSES.

