

Vertex O Series

on Microsoft Azure

A Streamlined Solution for Global Tax Management

Vertex O Series automates and centralizes indirect tax determination. It offers rich tax content, flexible deployment, and robust integration with financial systems to manage global indirect taxes such as sales, use, VAT, communications, and leasing taxes. Vertex O Series is part of a comprehensive suite including tax determination, compliance, e-invoicing, exemption management and returns processing.

Reliable Tax Determination

Vertex O Series is a powerful solution supporting everything from determining tax jurisdictions and maintaining an accurate rate database to calculating complex transactions. The robust functionality is balanced by a streamlined user interface, improving visibility and control for your tax department.

Our Partnership

For over a decade, Vertex and Microsoft have partnered to drive global commerce, simplifying global tax compliance, accelerating business growth and maximizing customers' Microsoft investments. That's why Microsoft trusts Vertex tax solutions for its global indirect tax needs.

Streamline Procurement and Reduce TCO

Streamline procurement and reduce total cost of ownership (TCO) by purchasing Vertex O Series, related products and services on the Microsoft Azure Marketplace. By using Microsoft Azure Consumption

Commitment (MACC), customers benefit from streamlined vendor management and consolidated billing. Best of all, because Vertex is Microsoft IP-Cosell Ready, 100% of your Vertex purchase is applied toward your MACC, helping you achieve your Microsoft commitment faster.

Deploy on Microsoft Azure

Take advantage of flexible deployment options to co-locate both your ERP and Vertex O Series tax calculation engine on Microsoft Azure.

- Improve systems performance by placing your tax calculation engine on Microsoft's high-speed global network.
- Increase reliability by utilizing Microsoft Azure's built-in high availability and disaster recovery capabilities.
- Vertex O Series on Azure supports connectors for virtually every popular financial system and e-commerce platform on the market, including Dynamics 365, SAP, Oracle and Workday.

Benefits



Reduced audit exposure



Improved compliance



Global scalability



Centralized control



Increased productivity

Transform your business with Vertex O Series



Integrated with Your Financial Systems

Consolidate fragmented tax processes with seamless integration of O Series with your financial systems, automating accurate tax calculations with centralized control and visibility.



Robust Tax Content

Minimize tax calculation and compliance issues. Vertex provides robust tax content, updated monthly, to help ensure the right tax is applied to every transaction. This includes sales, use, and value-added tax content, as well as industry-specific content¹ for communications and leasing, helping businesses stay compliant and accurate.



Exemption Management

Integrate with the Vertex Certificate Center¹ to streamline retrieval, validation, and renewal of exemption certificates, improving accuracy for businesses with exempt customers.



Tax Return Filing

Automate the process of generating monthly returns for SUT and VAT with Vertex tax returns software¹. Streamline internal processes, minimize errors, and reduce audit risk.



System Scalability

Grow your business with minimal friction in your tax automation. Vertex allows you to license the tax data and capabilities you need today and add on as you expand. Web-based access for worldwide users, enabling centralized control of company-specific taxability, rate research, reports, and monthly content updates help ensure seamless scalability and efficient tax management.



Deployment Flexibility

Businesses have the option to deploy using multi-tenant SaaS using Vertex's Azure tenant as well as within customer-controlled environments via Edge containers.



Pinpoint U.S. Jurisdiction Identification

Tools for address cleansing² 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

Vertex simplifies the setup of your company's unique taxability rules, exemptions, and data, ensuring accuracy and efficiency even for complex organizational structures.



Reporting

Tools designed for ease of use let you generate standard reports or leverage data to create custom reporting to support returns filing, audits, and enterprise tax management.



Registration Validation

When VIES lookup isn't enough, O Series tax engine integrates with Vertex Validator¹ for registration validation.



Digital Invoicing

Integrates with Vertex Invoice IQ¹ 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

Helping ensure effective control over tax processes and data visibility, Vertex provides role-based access to manage tax processes, audit logs to ensure SOX compliance, and federated security with single sign-on (SSO) to enhance protection and add convenience.



Data Intelligence

Add-on integrated tax analytic dashboards³ 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.)



Intelligent access to product knowledge

Ask product questions directly in the app. The Vertex Copilot generative AI feature enables real-time responses to product questions.⁴ The chatbot-like interface provides non-disruptive access to information in a sidebar within the current open workspace.

¹ This is available with an additional license and fee.

² 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.

³ 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.

⁴ 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.

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