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process and the returns. The preferred partner solution, a partnership in

Mary Girsch-Bock • Jun. 13, 2016



From the 2016 reviews of Sales and Use Tax Systems.

Product Strengths:

- Users can choose from three options and three product versions when purchasing
- Offers excellent integration capability with ERP systems and QuickBooks
- Offers two incentive programs for professional accountants
- No long-term contracts needed

Potential Weaknesses

- Very small users may find pricing prohibitive

Best Fit: Vertex SMB is a good choice for professional accountants, as well as small to

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use tax solutions for both small and mid-sized businesses. The product is designed to integrate with leading e-commerce platforms, as well as many popular ERP systems. Vertex SMB can be used as a stand-alone product, or used in conjunction with third party applications, as noted above.

New users have the option to choose from three different options when choosing a service; Access Rate Files, which provides access to tax rates. The second option; Generate Returns Only is for those that want to simply process sales and use tax returns for filing. The third option is Calculate Tax and Generate Returns, which allows users to calculate taxes on all sales and related transactions, as well as generate sales tax returns based on tax calculations.

Cloud based, the product currently offers three service levels: Standard, Professional, and Premium. The Standard version of the product offers users access to easily downloaded rate files, as well as online rate file calculations. The Professional version of the product offers tax calculations, as well as processing of signature-ready PDF returns and also includes product-specific rules and exemption certificate management. All of these features are accessible through the self-service portal.

e-Commerce and Automation: 5 Stars

The Premium level of Vertex SMB offers all of the services included in the Professional level, as well as the benefit of return filing and payment remittance capability, providing users with a complete sales and use tax management system, from tax calculation to payment remittance. Users can opt to simply download current tax rates, or utilize the tax calculation engines to apply accurate tax rates to all processed transactions and prepare and populate tax forms for signature and filing. Rate lookup capability is also included in the product by simply entering an address and zip code. And as a cloud-based product, tax rates and resulting calculations are always

accurate and up to date. The ability to calculate product taxability helps to ensure

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tax, including any accruals, asset management, inventory removal and purchase orders. Vertex SMB can also file consumer use tax returns as well as sales tax returns.

Reporting Tools: 4.75 Stars

Vertex SMB offers decent reporting capability, with users able to quickly view vital data by accessing reports such as the Configuration Report, Taxability Report, Transaction Report, and Customer Exemption Report. All reports are produced as a CSV file, so they can be easily exported to Excel.

Users can also manage exemption certificates in Vertex SMB, with users able to bulk upload exemption certificates, or simply upload a single certificate as needed. Users can easily manage the certificates in the product as well; setting both effective and expiration dates for each certificate.

Integration: 4.75 Stars

During setup, users can choose to integrate Vertex SMB with a connector, choosing from the list available in the product, which includes SAP, Microsoft Dynamics GP, Microsoft Dynamics AX, and Microsoft Dynamics NAV, as well as Sage 100, Sage 300, Sage 500, Magento, and QuickBooks.

Vertex SMB, in partnership with CPA.com offers professional accounting firms the option to enroll the Firm Advisor Program or the Firm Referral Program. The Firm Advisor Program offers user access to the Accountant Console, which offers complete 24/7 access to client data from anywhere.

Support: 5 Stars

Resources, such as online training, video tutorials, a marketing toolkit, and access to white papers and case studies are available to accountants for a monthly fee. The

Firm Referral Program is for accounting firms that are not currently in the market to

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is also suitable for small to mid-sized businesses that wish to handle sales and use tax management in-house.

Base pricing for accessing tax rate files runs \$300 per month. For those looking to just generate returns, professional pricing is also \$300 per month for an average of 10 returns filed per month. For those wishing to both calculate sales tax and generate returns base pricing is \$350 per month, with additional pricing based on number of sales invoices and returns filed monthly, which may put it out of the reach of the smaller business. Each contact runs month-to-month, with no long-term contract necessary.

2016 Overall Rating: 4.75 Stars

Automation • Sales Tax

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