Vertex Cloud Indirect Tax

Vertex

www.vertexCloud.com

From the 2019 reviews of sales tax compliance systems.

Vertex Cloud Indirect Tax is a Software as a Service (SaaS) application that offers sales and use tax compliance. Vertex Cloud is well suited for businesses of any size that desire sales and use tax automation and compliance. Vertex Cloud includes automated tax calculations based on transactions processed, and it also offers signature-ready forms for submission. The product includes both consumer use tax calculation and complete certificate management. Vertex Cloud is designed to

integrate with business and accounting software applications for behind the scenes

value-added tax calculations where applicable, while also managing all rules related to taxability for any ecommerce business, with industry-specific content available for retail businesses.

Vertex Cloud offers complete form preparation and electronic filing, with users able to print signature ready forms to submit by mail if they wish. All tax rules and rates are regularly updated in Vertex Cloud, so users will also have access to the most recent information. Vertex Cloud offers jurisdiction identification as well as advanced address cleansing to ensure the most accurate addresses, and can also manage exemptions on each sale. There is also a Returns Only option, with Vertex only handling the return portion of the tax compliance issue. Rate look up capability is also available in the application.

Vertex Cloud includes excellent reporting options, with a variety of reports available, including a Transaction Detail report, a Customer Expiration report for managing certificates, a Taxability report that manages all user-defined taxability categories by jurisdiction, and a Transaction Summary report, which allows users to view tax information by country, state, county, city, and district. Mentioned earlier, Vertex Cloud includes exemption certificate management, with users able to manage certificate effective and expiration dates, with an option to upload certificates in bulk if desired.

While setting up Vertex Cloud, users can choose from any number of connectors for complete integration with their current business software. Connectors are available for a variety of applications including Acumatica, Coupa, Episerver, Magento, Microsoft Dynamics, NetSuite, Oracle, Sage 100, Sage 300, QuickBooks Desktop, QuickBooks Online, Salesforce, SAP, and Sitecorp. Vertex Cloud can also custom design a connector for just about any platform if one is not currently offered.

Vertex Cloud Premium Support offers two components from which system users can

For accounting professionals, a partnership between Vertex and CPA.com allows firms to enroll in the Firm Advisor Program or the Referral Program. The advisor program offers several resources for CPAs including video tutorials as well as a complete marketing toolkit. A convenient dashboard is included, where users can navigate to all system functions as well as view data analytics from a single location. For those choosing to participate in the referral program, they can take advantage of a variety of incentives including pricing discounts for their clients. All users have access to five technical support calls each month, with telephone and email support options available.

Vertex Cloud Indirect Tax is a good solution for businesses as well as accounting professionals who manage sales and use tax compliance for their clients. Vertex also offers related products such as Vertex Indirect Tax O Series which is designed for enterprise level sales and use tax compliance, along with retail, leasing, and communications tax applications. Those interested in Vertex can contact the vendor directly for more information or view additional product details on CPA.com. Pricing is customized, and available from Vertex upon request.

2019 Overall Rating: 5 Stars

Sales Tax

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