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the entire sales and use tax process, Vertex Cloud Indirect Tax is best suited for ...

Mary Girsch-Bock • Nov. 23, 2020



Vertex Cloud Indirect Tax

Vertex

www.vertexCloud.com

Vertex Cloud Indirect Tax is an application that offers complete sales and use tax compliance. Designed for businesses of any size that have the desire to automate the entire sales and use tax process, Vertex Cloud Indirect Tax is best suited for businesses that sell nationally or globally, although it offers specialized solutions for

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application, calculating sales and use tax for more than 10,000 U.S. taxing jurisdictions, and VAT is calculated for international transactions. In addition to accurate rate calculations, Vertex Cloud also handles various e-commerce rules, consumer use tax for accruals, asset and goods management, and retail-specific scenarios.

Vertex Cloud includes an intuitive user interface that offers easy navigation, with tax professionals able to view client activity directly from online dashboards. Along with accurate tax calculations, Vertex Cloud includes complete form preparation, generating PDF returns that are signature ready for submission. If users don't want to submit forms themselves, they can opt to use the optional Vertex Cloud Returns Premium, which outsources the entire form preparation process including return preparation, filing, and payment remittance.

Vertex Cloud includes both jurisdictional identification as well as advanced address cleansing to ensure that all taxes are based on the correct location. Exemptions are easily handled on all transactions and a rate look up option is offered in the application as well.

Vertex Cloud includes excellent reporting options, with a variety of standard reports available including a Transaction Detail report that displays line item totals, a Transaction Summary report, which provide an overview of all transactions, a Customer Expiration report, which provides a list of all expired customer exemptions, the Validation Error report which displays errors that require a correction, and the Configuration report, which allows firms to view the current configuration for all customers. For those subscribing to the Returns option, there are additional reports available including a Reconciliation report, an Import Error report, and a Returns Filing Calendar report. User can also easily manage all

exemption certificates in Vertex Cloud including effective dates, expiration dates, and

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Vertex Cloud offers optional implementation services for new customers, including complete migration and upgrades, as well as complete system implementation. Various support options are also available through the customer portal, where users can access support resources which include a complete database of articles, product documentation, and a user forum. Support is available via email or using the toll-free number, with telephone support available during regular business hours. Vertex Cloud also offers various training options for new users including standard or custom-tailored courses as well as a continued learning option, which is available on the myLearning platform. This option includes tips, how-tos and videos. Online training options are also available.

Vertex Cloud offers a partnership option for accounting and CPA firms including a sales and marketing toolkit. The partnership also includes access to a user dashboard, where analytics and performance can be viewed for each client.

For businesses that sell nationally and internationally, or accounting or CPA firms that manage sales and use tax for numerous clients, Vertex Cloud Indirect Tax is a great fit. Capable of being used as a stand-alone application, users can opt to integrate the application with other Vertex solutions including Vertex Indirect Tax Returns, and Vertex Exemption Certificate Manager. Also available is the Vertex Indirect Tax O Series which is designed for enterprise level organizations to better manage sales and use tax. Those interested in Vertex applications should contact the vendor directly, as pricing is customized for each user and is available only upon request.

2020 Overall Rating: 5 Stars

Strengths:

- Offers excellent integration options

- Works behind the scenes to calculate sales, use, and VAT tax

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