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## Vertex Cloud Indirect Tax

[www.vertexinc.com/solutions/products/vertex-cloud-indirect-tax](http://www.vertexinc.com/solutions/products/vertex-cloud-indirect-tax)

From the **2018 review of Sales & Use Tax systems.**

Vertex Cloud Indirect Tax is a scalable sales and use tax solution that is used to simplify sales tax compliance for businesses of all sizes. Vertex Cloud provides automated tax calculations, signature-ready PDF forms, consumer use tax calculation and reporting, and complete exemption certificate management. The solution offers excellent integration capability with a variety of third-party applications, and also offers a strategic partnership with CPA.com that provides accounting professionals with a host of benefits and options.

Vertex Cloud can be used as a stand-alone application or integrated with a variety of platforms. Vertex Cloud currently offers three product levels; Standard, which includes complete rate look-up based on address, as well as the option to purchase a rate file that can be downloaded. The Professional version offers all Standard options plus tax calculations based on custom scenarios, end-to-end processing from calculation to a completed PDF return, exemption certificate management, prepayment management, and exemption certificate management. The Premium level contains all of these features, as well as the filing and payment remittance for returns by Vertex.

Users can opt to print a signature-ready PDF to file or allow Vertex to complete the

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company and filing period. Other options available from the dashboard include system configuration options, the ability to manage all completed tax returns, and the option to manage all system users, assigning the correct level of system access for all authorized users. The product also supports consumer use tax, including accruals, asset and goods management, inventory removal, and purchase orders.

Vertex Cloud offers good reporting capability, with reports such as the Customer Exemption Report and Taxability Report offering a quick look at customer data. All Vertex Cloud reports are created in a CSV format, making it easy to export reports to Microsoft Excel for further customization if desired. Vertex Cloud also offers comprehensive exemption certificate management, with the ability to set both certificate effective dates and expiration dates. Certificates can be uploaded to the product in bulk if necessary, or users can simply upload a single certificate as needed.

During the product setup process, users can choose to integrate Vertex Cloud with any number of connectors – which serve to provide complete product integration. Connectors include, but are not limited to Acumatica, Coupa, Episerver, Magento Commerce, Microsoft Dynamics, Oracle, Oracle+NetSuite ERP, SAP, and Sitecore. If a connector is not available, Vertex can custom design one to work with just about any platform or customers can build their own.

A partnership between Vertex and CPA.com allows accounting professionals to enroll in either the Firm Advisor Program or the Referral Program. The advisor option includes a dashboard, user access and role management, complete cloud management of all client data, and complete reporting capability. The referral program provides accountants with incentives for referring Vertex to their clients, with clients receiving preferred pricing on any products purchased.

Those participating in either program receive access to training and workshops, videos, success stories, whitepapers, and on-demand webinars. Users also have

access to up to 5 free technical support calls per month, with both telephone and

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**2018 Overall Rating: 4.75 Stars**

Sales Tax

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