



NetSuite

 **VERTEX** SMB

Built For
 **NETSUITE**

Improve Compliance and Reduce Cost and Risk with Vertex SMB for NetSuite

Created by the global leader in enterprise tax software and services, Vertex Inc., Vertex SMB aligns with NetSuite targeted for the middle market and below — right-sized for your growing company.

NetSuite ERP and NetSuite OneWorld can automate all of your back-office business processes to streamline your order to cash transactions. Now you can enhance the resulting gains in efficiency by automating your sales tax processes with Vertex SMB for NetSuite.

Deploy a Powerful Tax Engine

Vertex SMB offers a standard connector to NetSuite. After installing the connector, you can follow a few simple steps to link to Vertex® SMB TaxCentral and configure your setup. Then you can quickly begin using intuitive, online tools to support everything from performing tax calculations to generating signature-ready PDF returns.

Vertex SMB TaxCentral runs the data you enter into NetSuite ERP or NetSuite OneWorld through the Vertex SMB tax engine to determine what is taxable or exempt. It provides address validation across your applications to enable more accurate taxation and shipping processes. TaxCentral keeps track of taxable items, maintains transaction detail, and documents which taxes were or were not charged. At the end of the month, you can generate reports in NetSuite ERP, NetSuite OneWorld, and TaxCentral to reconcile your accounts. You can also file taxes using signature-ready PDF returns created by TaxCentral.

Realize a Quick Deployment in a Secure Cloud

Vertex SMB TaxCentral runs in the cloud on one of the most advanced calculation and returns platform in the industry, Vertex Inc. Cloud-to-cloud integration enables Web-services support from both NetSuite and Vertex SMB to ensure maximum agility and ease of use and deployment. There's no need for middleware or extra data storage, minimizing the cost and complexity of your solution landscape. Secure access is enforced by TaxCentral, so you can rest easy knowing your data is safe.

Features of Vertex SMB Sales and Use Tax Automation

Everything your business needs to manage sales and use tax and pay only for what you use. It's that simple.

Rate files — Download rate files by location or upload addresses for your specific business needs and access tax rate files. Jurisdiction tax amounts are continuously researched and updated, maintaining our tax content to keep you current.

Calculations and returns in one solution — Perform tax calculations and generate signature-ready PDF returns in one solution. With Vertex SMB, there is no need to access separate applications for tax calculations and returns. Our innovative interface guides you through a configuration process that allows you to personalize the taxability to make it as simple or complex as you need. With calculations and returns in sync, signature-ready PDF returns are automatically generated for you for each relevant time period.

Returns only — Upload tax data files from any data source and generate signature-ready PDF returns. No matter the source of your data, you can use our returns only offering for your or your clients' businesses. File and remit payment for the returns yourself, or allow Vertex SMB to file and remit payment for you.

Exemption certificate management — Store, update, and maintain your exemption certificates. Efficiently manage your exemption processes with Vertex SMB. You have the flexibility to bulk upload exemption certificates or upload them one at a time, set effective and expiration dates, store the certificates, and manage customer exemptions with our solution and within your ERP.

Consumer use tax — Calculate and report your consumer use tax. Consumer use tax can be complicated, with various scenarios triggering a requirement for the tax. Vertex SMB enables you to calculate and report your consumer use tax, including for accruals, asset and goods management, inventory removal, and purchase orders.

Pay-As-You-Go Pricing

Vertex SMB is a consumption-based solution with no upfront fees. Pricing is pay-as-you-go based on usage each month.

Returns Outsourcing

Outsource your returns and Vertex SMB will file and remit on your behalf. Vertex SMB ensures returns are paid and filed on time, every time.

Gain Complete Business Process Support

Vertex SMB TaxCentral for NetSuite ERP and NetSuite OneWorld offers full support for your order entry to invoicing processes including:

- **Address Validation:**
Validate address information for accurate tax calculation
- **Estimates:**
Get accurate tax rates for the estimates you prepare
- **Sales orders:**
Ensure the accuracy of taxes to be collected or paid
- **Invoices:**
Update your tax journal with real-time tax information
- **Credit memos:**
Calculate the correct tax amount for credit memos
- **Cash sales:**
Enter correct tax information for in-person purchases
- **Cash sales refunds:**
Calculate the correct tax amount for cash returns
- **Subsidiaries:**
Separate taxation among subsidiaries (in NetSuite OneWorld only)

Take the Worry Out of Maintaining Compliance

Leverage one of the most robust tax content and infrastructure in the industry with TaxCentral to realize the following business benefits:

- Reduced time and effort to perform sales and use tax calculations
- Greater accuracy of returns and compliance data
- Faster user adoption with anytime, anywhere accessibility
- Improved scalability to meet changing sales and use tax requirements
- Lower total cost of ownership and fast time-to-value with cloud integration through NetSuite
- Reduced risk with the backing of a market leader in tax technology — Vertex, Inc.

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