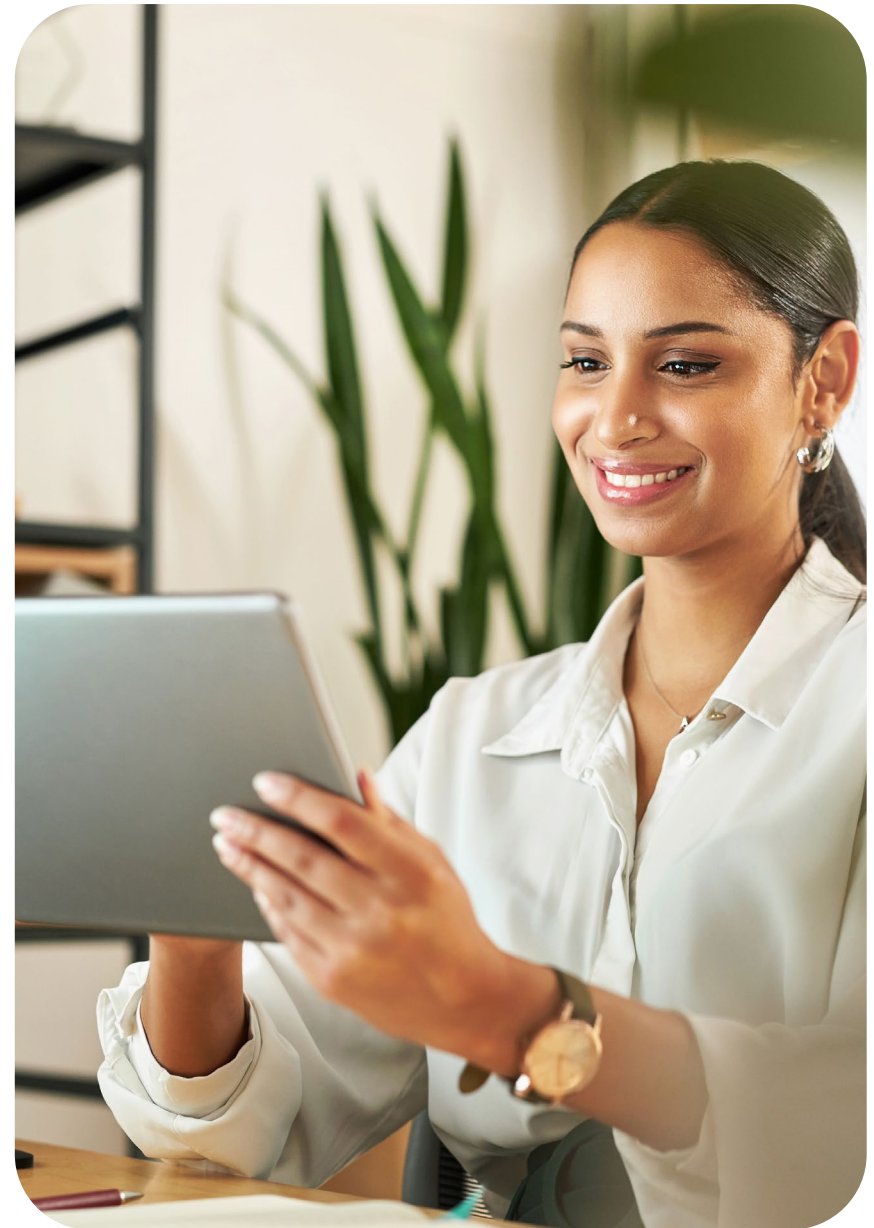


Tax Functions Microsoft D365 Users Can Automate with Vertex

Leverage Automation to Spend Less Time on Manual Tasks

Every hour spent updating tax content in D365 systems is an hour lost on other, more important parts of your business. Rather than having your tax and IT teams spend precious time on manual tasks – like visiting Department of Revenue websites to track tax changes or uploading all D365 instances with updated tax content – you can automate these processes (and more) by integrating a Vertex tax engine with your Microsoft D365 applications. This guide reviews the functions you can automate for each solution, including:

An introduction on how a Vertex tax engine streamlines tax for Microsoft users	3
Vertex for Microsoft D365 Finance & Supply Chain	4
Vertex for Microsoft D365 Business Central	5
Vertex for Microsoft D365 Commerce	6
Vertex for Microsoft D365 Sales	7
As well as a short summary about the Vertex and Microsoft Partnership	8



Introduction: Streamlining Tax with Microsoft + Vertex

As a Microsoft user, you can improve tax calculation processes by adding a single Vertex tax engine across your D365 solution to calculate tax in real-time. Immediate benefits include:

- **Eliminated manual processes**
- **Reduced audit risk**
- **Consolidated tax experience**
- **Improved scalability to quickly support business growth**
- **Reduced cost by improving accuracy, efficiency, compliance**

While Microsoft D365 does offer native tax calculation functionality, adding a Vertex tax engine helps you to streamline the process by providing:

- **Greater efficiency:** Tax content is continually updated by Vertex in the tax engine. This means you don't need to update sales tax groups or tax codes in each D365 environment.
- **Centralization and standardization:** Integrating a single Vertex tax engine across all your D365 systems allows you to keep all tax decisions in one place. You can configure your taxability to your company's unique needs, standardize the process across AR and AP and multiple businesses, and produce centralized, consolidated reporting from the tax engine.
- **Automated tax calculation:** Vertex tax calculations are supported by 700 million+ data-driven tax rules. A global research team continually updates the tax rules and rates to keep you in compliance with the latest legislation.

The Vertex tax engine offers extensive tax content and features. You can efficiently centralize and automate tax determination for even the most intricate transactions across 20,000+ jurisdictions globally, in 195+ countries, backed by 100+ Vertex tax researchers. This comprehensive coverage includes horizontal industry content and provides specialized vertical content for sales and purchasing transactions.

Keep reading to see how Vertex elevates your tax process across each Microsoft application.



Vertex for Microsoft D365 for Finance & Supply Chain

Standardize and centralize tax calculation for both AP and AR transactions in the Supply Chain Management solution for Accounts Receivable, Accounts Payable, and Project Management & Accounting. The integration supports both Microsoft D365 Finance and D365 Supply Chain Management within a single solution. With Vertex for Microsoft D365 Finance & Supply Chain, you receive:

- **Sales and seller's use tax content** (regularly and automatically updated) to provide real-time tax calculations on O2C transactions.
- **Consumer use tax on procurement** to automate and standardize tax calculation on requisitions and invoices and validate sales tax charged on purchases with the ability to accrue where needed.
- **VAT sales calculations** for EMEA and APAC.
- **B2B registration validation** to manage European VAT.
- **Address validation and cleansing*** to improve the accuracy of the Tax Area ID for a more precise calculation to enhance your customer source data and improve accuracy.
- **Tax details by jurisdiction** to know what tax is liable for each party in which authority, including country, territory, province, state, county, district, and city, along with tax code identification for streamlined reporting.
- **Added tax drivers** to support complex tax determination.
- **Flexible fields** to capture the unique data fields from D365 for a more precise tax calculation.
- **Conditional use of tax calculation** to give users greater control by allowing them to turn off tax calculation based on identified conditions.
- **Simplified tax code setup** to eliminate laborious ERP set-up and maintenance and transfer tasks to an automated and flexible design.
- **Tax compliance options, including software** to generate near-real time and periodic returns in-house and/or outsource the compliance workflow and returns filing process.
- **Exemption certificate management tools** to collect, validate, renew, and store audit-ready certificates. Auto-apply compliant certificates to transaction calculation.
- **Compliant invoice generation tools** to meet local requirements (including online marketplaces).

** US transactions only*

Vertex for Microsoft D365 Business Central

Simplify sales and use tax determination on AR and AP transactions without constant Microsoft system updates. Address cleansing and precise tax jurisdiction assignment relieves your need to manually populate and manage tax area codes within Business Central. With Vertex for Microsoft D365 Business Central, you receive:

- **Consistent end-to-end tax calculation support** for D365 sales, service management, and purchasing.
- **Sales and seller's use tax content** (regularly and automatically updated) to provide real-time tax calculation on O2C transactions.
- **Consumer use tax on procurement** to automate and standardize tax calculation on requisitions and invoices and validate sales tax charged on purchases.
- **US and Canada tax content** to support businesses operating in North America.
- **Address validation and cleansing*** to improve the accuracy of the Tax Area ID for a more precise calculation to enhance your customer source data and improve accuracy.
- **Tax details by jurisdiction** to know what tax is liable for each party in which authority, including country, territory, province, state, county, district, and city, along with tax code identification for streamlined reporting.
- **Added tax drivers** to support complex tax determination.
- **Flexible fields** to capture unique data fields from D365 for a more precise tax calculation.
- **Conditional use of tax calculation** to give users greater control by allowing them to turn off tax calculation based on identified conditions.
- **Simplified tax code setup** to eliminate laborious ERP set-up and maintenance and transfer tasks to an automated and flexible design.
- **Tax compliance options, including software** to generate near-real time and periodic returns in-house and/or outsource the compliance workflow and returns filing process.
- **Exemption certificate management tools** to collect, validate, renew, and store audit-ready certificates. Auto-apply compliant certificates to transaction calculation.
- **Compliant invoice generation tools** to meet local requirements (including online marketplaces).

** US transactions only*

Vertex for Microsoft D365 Commerce

Simplify sales tax determination without constant Microsoft system updates. Address cleansing and precise tax jurisdiction assignment relieves your need to manually populate and manage tax area codes within D365, improving accuracy and efficiency across all D365 solutions. With Vertex for Microsoft D365 Commerce, you receive:

- **Omnichannel support**, including cash and carry, buy online and pick up, buy in-store and ship, recall and return, call center orders, and CPOS/MPOS.
- **Sales and seller's use tax content** (regularly and automatically updated) to provide real-time tax calculations on O2C transactions.
- **Consumer use tax on procurement** to automate and standardize tax calculation on requisitions and invoices and validate sales tax charged on purchases.
- **US and Canada tax content** to support businesses operating in North America.
- **Address validation and cleansing*** to improve the accuracy of the Tax Area ID for a more precise calculation to enhance your customer source data and improve accuracy.
- **Tax details by jurisdiction** to know what tax is liable for each party in which authority, including country, territory, province, state, county, district, and city, along with tax code identification for streamlined reporting.
- **Added tax drivers** to support complex tax determination.
- **Flexible fields** to capture unique data fields from D365 for a more precise tax calculation.
- **Conditional use of tax calculation** to give users greater control by allowing them to turn off tax calculation based on identified conditions.
- **Simplified tax code setup** to eliminate laborious ERP set-up and maintenance and transfer tasks to an automated and flexible design.
- **Tax compliance options, including software** to generate near-real time and periodic returns in-house and/or outsource the compliance workflow and returns filing process.
- **Exemption certificate management tools** to collect, validate, renew, and store audit-ready certificates. Auto-apply compliant certificates to transaction calculation.
- **Compliant invoice generation tools** to meet local requirements (including online marketplaces).
- **Failover coverage** to calculate tax despite internet connectivity.

* US transactions only

Vertex for Microsoft D365 Sales

Simplify sales and use tax determination for reduced audit risk and increased efficiency. Tax content is maintained in the Vertex tax engine, which eliminates your need for continual Microsoft system updates. With Vertex for Microsoft D365 Sales, you receive:

- **Consistent end-to-end tax calculation support** for D365 quotes, sales orders, and invoices.
- **Sales and seller's use tax content** (regularly and automatically updated) to provide real-time tax calculations on O2C transactions.
- **US and Canada tax content** to support businesses operating in North America.
- **Address validation and cleansing*** to improve the accuracy of the Tax Area ID for a more precise calculation to enhance your customer source data and improve accuracy.
- **Tax details by jurisdiction** to know what tax is liable for each party in which authority, including country, territory, province, state, county, district, and city, along with tax code identification for streamlined reporting.
- **Added tax drivers** to support complex tax determination.
- **Flexible fields** to capture unique data fields from D365 for a more precise tax calculation.
- **Conditional use of tax calculation** to give users greater control by allowing them to turn off tax calculation based on identified conditions.
- **Simplified tax code setup** to eliminate laborious ERP set-up and maintenance and transfer tasks to an automated and flexible design.
- **Tax compliance options, including software** to generate near-real time and periodic returns in-house and/or outsource the compliance workflow and returns filing process.
- **Exemption certificate management tools** to collect, validate, renew, and store audit-ready certificates. Auto-apply compliant certificates to transaction calculation.
- **Compliant invoice generation tools** to meet local requirements (including online marketplaces).

* US transactions only



The Vertex and Microsoft Partnership

Vertex is fully committed to supporting D365, Azure, and Microsoft Marketplaces

- Vertex is aligned with D365 leadership, product management, and engineering. We're developing and supporting enhanced tax APIs and functionality across all D365 solutions.
- Microsoft-validated: Vertex solutions are available via Microsoft AppSource and Microsoft Marketplace.

Vertex and Microsoft are long-time customers of each other

- Vertex is a customer of Microsoft, utilizing Office365 solutions, Teams, and Azure for global operations, product development, and deployment.
- Microsoft has been a Vertex Customer since 2009, using O Series for global indirect tax and compliance.

Microsoft is supporting Vertex's migration to SaaS on Azure

- Vertex is a Microsoft ISV Success and Co-Sell Ready Partner.
- Azure FastTrack Participant – Microsoft-led implementation of Vertex SaaS solutions on Azure.

Vertex is Microsoft's trusted global tax expert

- Microsoft selected Vertex as the trusted tax vendor and expert to advise on how best to enable global enterprise tax solutions in Dynamics 365.
- Vertex is partnering with Microsoft's top global enterprise system integrators to deliver tax solutions for Dynamics 365.

Ready to stop manual processes and automate tax with Vertex? Visit vertexinc.com/partners/Microsoft for more information.

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