



Simplifying Sales and Use Tax Automation for Salesforce Order Management

As a proud ISV Partner, Vertex partners with Salesforce to streamline, automate, and standardize tax calculations for Salesforce Order Management to calculate tax during the entire fulfillment process. Vertex's Salesforce Order Management provides customers the ability to visually manage workflows, reach customers across the globe, process payments and manage cancellations and returns all within your order management console.

Key Features



Accurate Tax Calls throughout Order Fulfillment

Ensure that your order is accurately tracked from when an item is placed in a cart, through shipping and payment information, to order submission within the Order Management Console even when a discount code is applied.



Negative Tax Calculation

Accurate tax calls made to Vertex when items are added or removed or the order is canceled. When this happens, a change order is created, keeping the original order intact throughout fulfillment.



Flexible Pricing Plans

Choose from multiple pricing options based on your needs. No overage fees apply. We'll provide a system with the functionality you need for your business today, and the scalability to grow with you.



Multiple Deployment Options

Vertex for Salesforce Order Management supports Cloud, On-Demand, On-Premise, and Hybrid deployment options.



Global Compliance

Automate your tax calculation for sales, use and VAT.

Salesforce Order Management

Customer journey

Customer



Tina

Tina places order with flowers123.com.

Tina needs to change quantity from two bouquets to one.

Tina has visibility into order and updates quantity.

Tina receives confirmation email with order details.

Salesforce Order Management user



Flower company

Flower company receives Tina's order.

Flower company receives change order request.

Flower company fulfills order and reflects order change.

Flower company ships to customer and posts final invoice with accurate sales tax.

Salesforce Order Management



Order is activated.

Change order is updated, and new tax rate is applied.

Fulfillment order is updated.

Invoice is posted.



Vertex Tax Engine

Calculates and updates tax at each step of the buyer's journey.

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Vertex integrates across Sales, Revenue, and Commerce Cloud.
To learn more, visit us in the Salesforce AppExchange.



North America
King of Prussia, PA, USA

Latin America
São Paulo, BR

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