Vertex Community FAQ'S **2.26.21**

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Transition to the New Vertex Community

What is happening?

- Through our Customer Support modernization effort, we are optimizing the customer experience in February 2021. We are substantially improving our structure, processes, and tools to make it easier and faster for Vertex to help our customers get resolutions to their questions.

What is changing?

- We've modernized our Support teams, processes, and technologies. Through the technology enhancements, we'll be able to provide:
    - Enhanced self-service
    - Online ticket creation and tracking
    - Faster issue resolution
    - Personalized service
    - Streamlined customer profiles and account management
- In addition, the Vertex Community will include the Learning Management and Knowledge System to have access to numerous training and knowledge modules.

What is launch date of the new Vertex Community?

- February 28. Communications will be sent with instructions on how to access our new Community site prior to our go-live. If you do not receive this email, click here for further directions.

Is myVertex no longer being used?

- myVertex is being retired and you will no longer be able to access it. The Vertex Community portal is the new, streamlined and improved way to contact Vertex Customer Support Online.

Is the Cloud Help Center no longer being used?

- Cloud customers will still be able to log into the Vertex Cloud portal, but if they wish to contact support, submit cases or find resources they will need to go to the Vertex Community.

Will the myVertex Portal name change?

- The myVertex portal is being decommissioned. The Vertex Community is the new portal for all of our customers.

Will the people that are already set up in 'myVertex' be automatically transferred to the new support site, or will everyone need to be added from scratch?

- Each customer contact will get an email from Vertex with directions to the new site. Those with existing access will simply be asked to update their password for security reasons. Those without access will be asked to register with the Vertex Community, as they would with any new application.

Will myVertex and the Cloud Help Center users be automatically redirected to the Vertex Community portal when it goes live?

- Yes. Existing users will be automatically redirected.

What's different in the new process among On Premise, On Demand and Cloud deployments?

- The process is the same regardless of the type of Vertex software deployment you have. One of the main aims of our recent changes was to standardize our process across Customer Support.

Can I get training to better understand the changes?

- Yes, we held three webcasts to walk through the changes. You can view these changes in any of the below recordings:
    - Webcast for Vertex Cloud Customers
    - Webcast for Vertex On-Premise & OnDemand Customers
    - Webcast for Vertex Returns Outsourcing Customers
- We encourage you or any users of Vertex Customer Support to familiarize yourself with the new community site.

Getting Started

What do I do if I can't find my username?

- Contact your company's Vertex Administrator or Primary Contact. If these individuals can't help you then contact Vertex Customer Support at support@vertexinc.com

What do I do if my password doesn't work?

- Contact your company's Vertex Administrator or Primary Contact. If these individuals can't help you then contact Vertex Customer Support at support@vertexinc.com

Can my username/password be the same as my Cloud Help Center account?

- If you have a current username and password with Vertex, you'll receive an email with a link to sign into the Vertex Community Portal, where you can reset your password.

If I create a service request in the Vertex Community, who receives it?

- Creating a Service Request in Vertex Community will automatically direct it to the appropriate team within Customer Support to triage and address your request.

Administration

How do I know if I'm an Approved Administrator?

- For On-Premise or On-Demand customers, the person(s) responsible for the Vertex relationship in your company should have a list of Approved Administrators. If s/he doesn't please contact Customer Support via the portal. Vertex On-Premise & On-Demand customers must assign at least two Approved Administrators. These may be tax or technical individuals. If you can't find your company's Administrator, contact Customer Support at support@vertexinc.com
- If you are a Cloud customer, the person designated as the Primary Contact will serve as the Administrator.

Do Administrators have the ability to add new users or make other changes?

- Yes, they can add users or help users who have lost their usernames or passwords and perform a number of other simple administrative tasks. VOS (Premium Returns) customers' Administrators have additional tasks they can perform.

Will additional users still need authorization from the Administrator to access the new portal?

- Yes, additional users will need to register with the Vertex Community just as they would with any new application. Your Administrators will receive these "registration requests" and add individuals as new users. This allows you to manage access to Vertex Community.

Submitting Service Requests

Will we use one portal for submitting support issues for Vertex Indirect Tax Returns On-Premise and Vertex Cloud (SAAS)?

- Yes. The Vertex Community Customer Support section should be used by all customers regardless of their product/deployment type.

What are the Community self-service options?

- The Community portal enables many self-service options, only some of which relate to Customer Support. For this group, you'll be able to submit new Service Requests, check the status and add comments to existing requests, search for and access Knowledge Articles, access Critical Tax Change files

What is a "Case Request Wizard"?

- The Case Request Wizard is a new feature introduced in our Vertex Community Portal. It's the method you should use to submit Service Request, or cases, to Vertex Customer Support. The Wizard asks a short series of questions to help us determine how best to support you.

Do I have to use the Case Request Wizard if I'm submitting my case via the Community Portal?

- Yes, in the Support section of the Community Portal you will use the Case Request Wizard to submit your Service Requests.

Why do I have to indicate my product in the Case Request Wizard?

- Yes, you will have to select the Vertex product you're submitting a Request for. The products that your company has purchased will be automatically listed in our Case Request Wizard based on your user profile.

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How do I know or find out which Vertex product I have?

- The first step is to check with your Approved Administrator. If your account administrator is unsure, not available or left your company, please contact support at support@vertexinc.com.

Why can't I add a severity to my case?

- You actually do add a "severity" or "priority" to your case when you use the Case Request Wizard. This Wizard enables you to indicate the impact on your business of the issue you're having. This primarily determines the priority of your Service Request.

When raising a Case in Support can you cc [an] email address so multiple people are kept updated on status of the ticket/case?

- Not at this time, but we are planning future enhancements to enable this.

Is it possible to add participants to get notifications on ticket updates?

- Not at this time, but we are planning future enhancements to address this issue.

The Customer care team always asks for About page, SIC LOG, default SIC xml etc., every time we create an incident, is there any change in process or experience?

- Customer Support will still need to ask for this information to properly troubleshoot your issues. We are working on improving our product offerings so that this information is not required to be sent for every issue.

Looking at the case creation process you have internal logic evaluating the criticality of the issue. What if the issue is more critical than it looks like, how can I raise severity?

- The Case Request Wizard questions are intended to help you accurately capture the severity of the issue you're facing. Additionally, you can always use the Description field towards the end of the Wizard to more subjectively describe the impacts you're experiencing.

Are there support teams in multiple time zones? Are high priority cases handed off from shift to shift to keep the work progressing?

- Vertex Customer Support is available 24x7 and requests are prioritized by business impact across all of those times. Critical cases are closely monitored by supervisors and technical experts to ensure they're addressed as quickly as possible. However, some of our more advanced experts such as IT, Tax Research, and Connector Development are available only during standard business hours.

Is there a way to identify Silver Support clients to route & expedite accordingly?

- We will route cases based on the level of support each customer has purchased, which is captured in our systems.

So there is not an official submit button, you just click next and [your Request has been] submitted?

- Correct, hitting the "Next" button will submit your ticket.

Service Request Status

Will Service Requests, open & closed, be moved from myVertex to the new Vertex Community? Will unresolved and resolved tickets be migrated?

- Yes. All the data related to existing and historical cases will be preserved, and the data on open Cases will be migrated from our current systems to the new system before we go live.

What's the best way to contact support: Vertex Community, email or phone?

- You will typically get the fastest resolution using the Community Portal, as it allows us to automatically route your Service Request to the Analysts with the right expertise.

What is the difference between a Service Request and a Case?

- A Service Request is what you initially submit to Customer Support requesting assistance. Based on your Service Request, Customer Support then creates a case, which contains information on your issue, your organization, you as a contact, and many other details.

Will you be able to associate both your sandbox and PROD instances directly to your support portal when creating an incident?

- When creating a Service Request, you would have to create two different cases, one for Production and one for Sandbox. Once a Case is created you can work with the Support Specialist to update the details to convey that your issue is impacting both.

The status of my Service Request hasn't changed in the last couple of days – what does this mean?

- It just means that we're actively working your case, and in some cases pulling in experts from other parts of Vertex. You can always request an update via the Community Portal.

How do I know that the status of my Service Request on the portal is up to date?

- Customer Support Analysts must update the status of a case they are working on. So, you should always be seeing the latest status. And if you are wondering, you can leave a comment on the Case for your Analyst

Once I submit a Service Request how do I know which Customer Support Analyst will be working on it?

- The Analyst working your case will reach out to you if further information or files are needed to resolve your case. In the near future you should be able to schedule a call with an Analyst working your case.

Non-portal Channels

Does this replace the current process of sending email of issues to cloudsupport@vertex.inc? Will the Cloud Support email be active after the portal goes live or we can log issues on portal only going forward?

- While the Vertex Community will be the best way to connect with Customer Support going forward, you will still be able to email us using our current Support email addresses.

How do I reach someone outside of Vertex standard hours?

- Only customers with enhanced support can call outside of regular business hours. This is described in our updated Support Policy and "Introduction to Vertex Customer Support"

Do you get an email If you need additional information from the user?

- If Support needs additional information in order to successfully troubleshoot your Service Request, they will either "tag" you on a comment on your case, in which case you'll receive a notification of this, or they'll send you an email or even call directly, depending on the nature of the Request.

I'm a Vertex Cloud customer. If I call to report an issue, will someone answer?

- Yes. One of the enhancements we made was to enable any customer to call in. There's a new, simplified menu that should get you to the right team to take your information. We don't recommend using phone support, as it typically requires more time than using our Case Request Wizard that's built specifically for that purpose.

Can I call the person working on my case directly?

- No, but in the near future you will be able to request a call-back from the Analyst working your case.

What's Next

What enhancements are you planning for the balance of the year?

- There are many items in our "backlog" of enhancements. Some of these include the ability to request a call-back from a Support Analyst, the ability to live chat with an Analyst, the ability to share case access with other users in your company, and many more.

It's great that you have a new portal and Support process; will you also be updating your software?

- There is an ongoing process for updating and enhancing our software. And we're working on significant improvements that will better harmonize your experience across On Premise, On Demand and Cloud deployments.

Support Policy & Miscellaneous

Are you going to change your standard support, silver support, gold support features?

- Vertex Customer Support is always reviewing our offerings to ensure we can provide you with the best experience possible to achieve your business goals. We do anticipate changes to our Support Policies regarding levels of support coming in 2021.

What is the SLA for us to get responses for our tickets?

- Please refer to the SLAs in our current Support Policy. We do anticipate changes to our Support Policy regarding levels of support coming in 2021 and will let you know as soon as there is an update.

What do I do if I can't find the Knowledge Article I'm looking for?

- If you're looking for an article related to your case, our new system will actually recommend the most relevant articles. If you're searching for an article, the first step is to try different search terms. If you still can't find what you're looking for, feel free to suggest an article be created. If you are still stuck, please contact Vertex support for help at support@vertexinc.com

Does the Knowledge Base allow you to filter by State for US taxes?

- There isn't yet the ability to filter by State for US taxes. If this is a much-requested feature, we'll add it to our enhancements plans.

Can client[s] run reports[s] to pull all cases for our company account[s] by date? What are the different report columns available? is there a way to schedule the report and send to an email inbox?

- Currently customers don't have the ability to run reports via Vertex Community. If this is a much-request feature, we'll consider it for a future enhancement.

Can I escalate a support issue?

- The best and fastest way to escalate a case is by letting Customer Support know that you would like your Request or issue escalated. Customer Support will immediately indicate that a Case needs to be escalated and Support supervision will be notified.

What happens to Service Requests/Cases that are already in progress, and how can we be assured they aren't lost during the cutover?

- All existing cases will be migrated to the new system with thorough testing to ensure that no data is lost. In addition, data will be kept in existing systems for a period of time as a fail-safe if needed. Existing system (OSVC) references will be maintained for continuity after go-live.

Currently in myVertex, if we also utilize Vertex Outsourcing Services, there is a link to get to the portal. Will the new portal offer this function? If not, how do we access Vertex Outsourcing Services?

- Customers who have the Outsourcing Services product will see an Outsourced menu item at the top of their screen, and will be able to easily toggle back and forth between Support and Outsourcing

Will the current notifications we have selected be migrated?

- Yes, they will be.

Regarding the status of a service request: If an item is pending customer action - will the status go back to processing after the customer has completed the action?

- Yes, it will. This enables you and Vertex to always have the most up-to-date status.

Can we add additional team members to the ticket so they will also receive notifications when your CS folks respond?

- When you add comments to your case in the Vertex Community you can choose to make the comment "Public", in which case anyone in your organization with access to the Community will be able to see the comment. However, there isn't currently a way to ensure notifications go to someone other than the case owner.