

## An update about Vertex® Cloud Help Center

Vertex is pleased to announce that the Help Center articles and videos for Vertex® Cloud are now available in [Vertex Community Knowledge Base](#), which is the central location for updates to User and Reference information for many Vertex products.

We have moved the Vertex Cloud Help articles to Vertex Community to enhance your experience with Vertex content, especially with search.

When you visit Vertex Community now for Vertex Cloud Help articles, you also have quick access to Vertex University, the Support Portal, and the Forum discussions. Please bookmark Vertex Community and note that the customer portal is your new source for updated Vertex Cloud content.

### Is the Knowledge Base dedicated to Vertex Cloud?

No, the Knowledge Base in Vertex Community holds documentation for many Vertex products.

### Why is Vertex making this change?

We made this change as one of our product documentation enhancements. By linking the Help Center button to the [Knowledge Base](#) articles in Vertex Community, you have access to the screen instructions and fields definitions. But the Knowledge Base provides valuable benefits that are not available with Help Center:

- Predictive search enables you to select from Vertex Cloud product documentation *and* Support articles.
- The Knowledge Base gives you one central location for Vertex Cloud User and Reference information.
- Articles can be read by screen readers for your users who need this service.
- Articles are tagged so you know if a feature is specific to Vertex Cloud or to O Series On-Premise, On-Demand, or Cloud deployment.
- Navigation aids provide you with efficient, click-of-the-button access to related content.

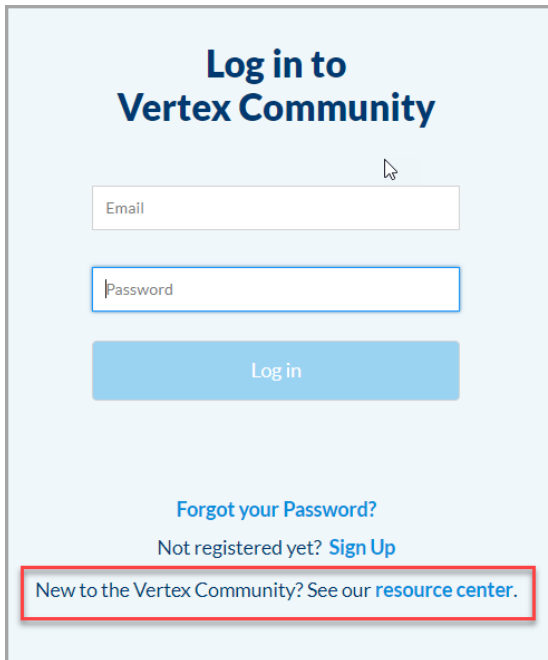
With an upcoming release, the Help link in Vertex Cloud, will redirect you to Vertex Community. Vertex will be decommissioning the Help Center site later this year.

### You can create your own PDFs

In three simple steps, you can create a PDF from within the Knowledge Base articles rather than going to the Download Center.

## Requesting access to Vertex Community

1. Visit [Vertex Community](#). If you are new to the Vertex Community, click the [resource center](#) link.



2. Review the **Instructions for Accessing the Vertex Community** section.

**Important:** To complete the Login Credentials form, your company’s account number is required. If you do not know your account number, contact Customer Support at [support@vertexinc.com](mailto:support@vertexinc.com). In the email, let them know that you are a CPA.com user, provide the account name, and request your account number so that you can request access to Vertex Community Knowledge Base for the Vertex Cloud Help articles.

3. Complete the [Vertex Community Login Credentials form](#).
4. Vertex notifies you about your access to Vertex Community.

## Accessing Vertex Cloud articles in the Knowledge Base

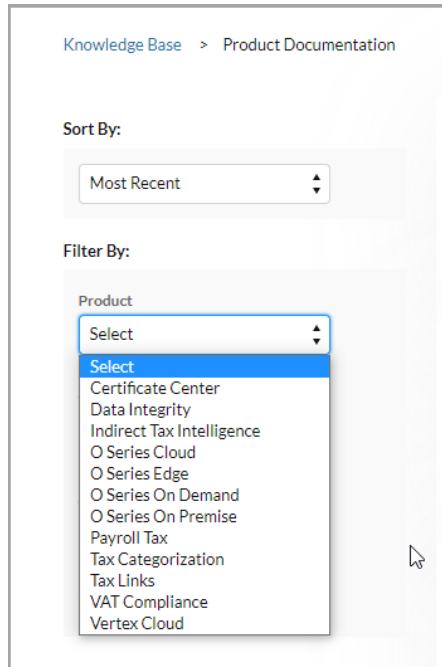
1. Log in to [Vertex Community](#).

**Tip:** When you open your Vertex solution, also log in to [Vertex Community](#) on a separate tab or window on your web browser.

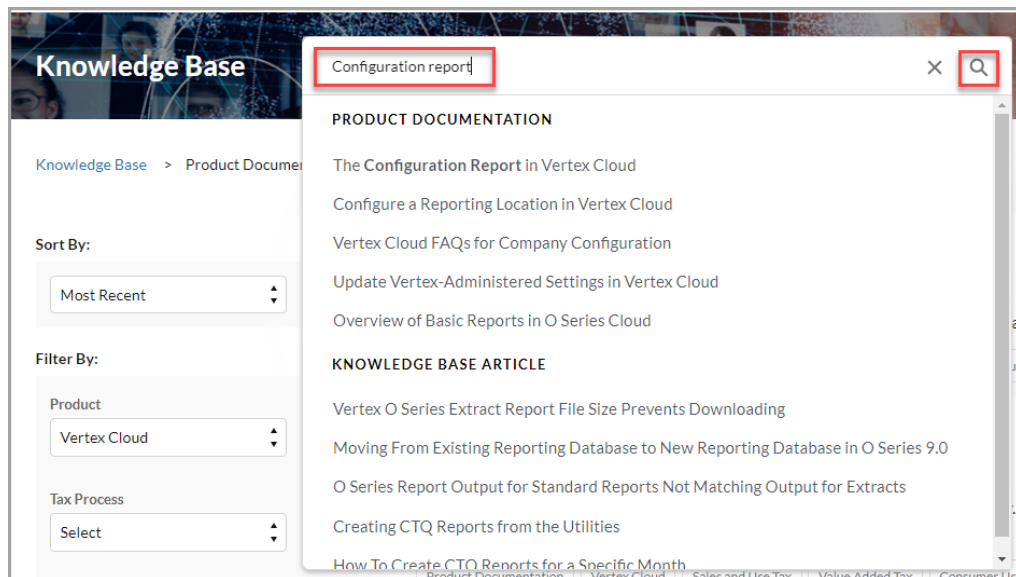
2. Click **Knowledge > Explore Product Documentation**.

3. The Knowledge Base is a self-service library of articles and publications. Each article is part of a publication of related articles. To find an article, use the Search feature. Here are some tips:

- *Sort or Filter* – To sort by most recently published or oldest first, use the **Sort by** option. To filter the search results by **Product**, use the **Filter by** options:



- *Key words* - Search for a topic by typing a few key words in the **Search Knowledge** field. A drop-down list of some articles matching those key words displays as you type.



- *Search terms* -- To see results with the first sentence of an article, enter your search term, and press **Enter**. Or click the magnifying glass in the **Search** bar. You can use the **Sources** and **Product Documentation** panels to refine your search.

**Sources**

- All
- Product Documentation
- Knowledge Base Article

**Product Documentation**

Collapse All | Expand All

- > ContentType
- > Product
- > ProductSubcategory
- > TaxType
- > TaxProcess

### Search Results for "Configuration report"

**Product Documentation**  
1 - 5 out of 1349 results found

**The Configuration Report in Vertex Cloud**  
The **Configuration Report** displays configuration information for a specific company. ... Configuration changes must be saved before they are displayed on the **Configuration Report**. ... This video provides an overview of the **configuration report**.  
Updated Aug 11, 2023 | Tags: Product Documentation, Vertex Cloud, and 4 others | 10 min read

**Configure a Reporting Location in Vertex Cloud**  
you to report tax by reporting location numbers: State Type of Reporting Location Colorado Branch ID Illinois Location Sequence Number Missouri Site Code If you file returns for Colorado, Illinois, and/or Missouri and your subscription includes returns processing, you must **configure reporting**  
Updated Jul 13, 2023 | Tags: Product Documentation, Vertex Cloud, and 4 others

**Vertex Cloud FAQs for Company Configuration**  
Check your **Configuration Report** to verify that the applicable return or returns are configured in the jurisdiction and that the right filing frequency is selected. ... Refer to the **Configuration Report** to confirm your returns configuration.  
Updated Apr 14, 2023 | Tags: Product Documentation, Vertex Cloud, and 3 others

**Update Vertex-Administered Settings in Vertex Cloud**  
Export the **Configuration Report**. ... Refer to the article **Configuration Report** for details.  
Updated Jul 13, 2023 | Tags: Product Documentation, Vertex Cloud, and 4 others

- When you see an article that you're interested in, click it in the list. The **Contents** panel for that publication and the article display.

The screenshot shows a knowledge base article page. On the left is a 'Contents' panel with a list of report titles, including 'The Configuration Report in Vertex Cloud'. The main content area features the article title, a date (Aug 11, 2023), a read time (10 min read), and introductory text. A video player with a play button is embedded in the article. Below the video is a section titled 'Before you begin generating a configuration report' with a note about required roles. The breadcrumb path at the top reads 'Knowledge Base > Product Documentation > Article'.

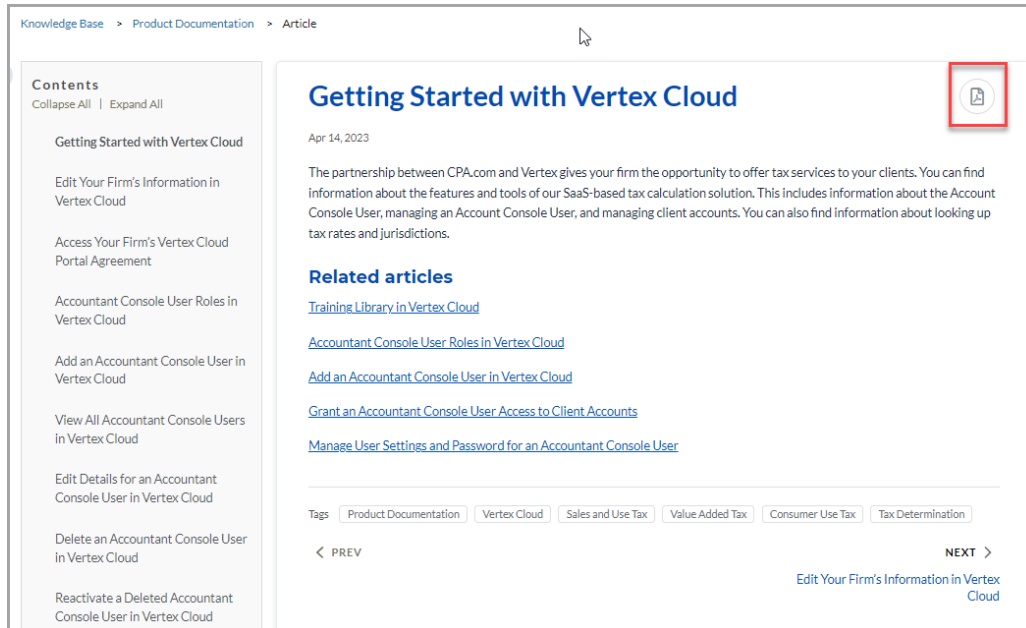
Navigation aids enable you to find related content.

The screenshot displays navigation aids at the top of the article. A 'Tags' section contains buttons for 'Product Documentation', 'Vertex Cloud', 'Sales and Use Tax', 'Value Added Tax', 'Consumer Use Tax', and 'Tax Determination'. Below the tags are two navigation buttons: '< PREV' with the link 'Reports in Vertex Cloud' and 'NEXT >' with the link 'The Customer Exemption Report in Vertex Cloud'. Both navigation buttons are highlighted with red boxes.

**Tip:** You can also use the browser's back arrow to return to a previously viewed article.

## Creating a PDF of a Knowledge Base article or publication

1. To create a PDF of the article or publication, click the **PDF icon** to the right of the heading.
2. Save the selected topic, the selected topic and the subtopics, or the entire publication as your PDF.



3. When you see the message, *Your PDF was generated successfully*, look for your PDF in the Downloads area of your web browser.

## Providing feedback about the Vertex Cloud product documentation

Let us know what you think of the articles. You can:

- Post a comment or question about documentation in the [Vertex Community Forum](#).
- Send an email to [Documentation@Vertexinc.com](mailto:Documentation@Vertexinc.com).

Please share this communication and instructions with all Vertex Cloud users at your company.