



Optimizing Business “ilities” with Vertex’s Cloud Solutions

Security, Usability, Reliability,
Elasticity, Scalability, and Flexibility



When it comes to supporting your colleagues in the tax department, enhancing your tech stack with top-tier applications is a must. Not only does this lead to increased customer satisfaction, revenue growth, and profitability, but it also simplifies your daily tasks, freeing you up for more strategic endeavors.

A smart approach to discovering high-quality tax applications involves evaluating your choices through the lens of software “ilities.”

In this eBook, we'll delve into how Vertex's cloud-based solutions perform in terms of security, usability, reliability, elasticity, scalability, and flexibility, allowing you to make informed decisions when selecting the best tax solutions for your organization.



Security

Security is paramount when dealing with financial and tax data, given its sensitive and critical nature. Tax regulations and compliance standards enforce stringent requirements for safeguarding this information, placing legal responsibilities on organizations to ensure its protection. Security breaches can result in operational disruptions, financial losses, erosion of customer trust, and potential consequences like erroneous filings, penalties, and legal troubles.

At Vertex, we take the security of your data very seriously. Our dedication to safeguarding your information is evident in the thorough set of measures and practices we've put in place. We leave no stone unturned, starting with standard corporate policies and extending to rigorous vulnerability and penetration testing. Additionally, we conduct tabletop exercises to enhance our security response capabilities and maintain incident response plans, so that our teams are well-prepared for unexpected situations.

To add an extra layer of scrutiny, we collaborate with trusted third parties for independent assessments of our security efforts. Our engineering and information security teams adhere to strict standard operating procedures, with security and data integrity as fundamental principles. Brad Cameron, Senior Vice President of Software Engineering at Vertex, highlights, "We proudly hold the SOC 2 Type 2 industry-standard certificate, affirming our commitment to evaluating our written processes against our actual practices. Our unwavering commitment to security within our system provides you with the confidence that your data is safe and secure."

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Usability

Tax regulations are intricate and subject to frequent changes, making it essential for your tax team to quickly and easily access relevant tax data and tools. Implementing a solution with a user-friendly interface leads to increased productivity and efficiency, allowing tax professionals (and your IT team) to focus on strategic tax planning and analysis rather than struggling with complex software.

At Vertex, we've meticulously considered the needs of tax professionals, ensuring that our software is intuitive and efficient for your tax team. Phil Yurko, Vice President, Commercial Infrastructure at Vertex, provides this example, "We went through a big accessibility exercise, for users with disabilities and those efforts are ongoing... so that's one area. But I think the real key in ensuring high-quality usability is establishing our workflows and widgets in a way that ensures we are improving configuration within the system, which in turns makes it as easy as possible for the tax professional to get what they need. Also, our solutions are highly configurable both in terms of their ability to calculate tax, but also with the choices of operating systems, databases, and application servers."

Reliability

Reliable uptime is essential, especially when dealing with tax-related matters. Missing tax deadlines due to unreliable systems can lead to a cascade of problems, including penalties and fines that eat into your bottom line. Moreover, inaccurate tax reports resulting from unreliable uptime can trigger compliance issues, inviting even more trouble from regulatory authorities. Beyond these financial implications, inconsistent uptime can disrupt day-to-day operations, impacting everything from timely payments to customer satisfaction. It can even affect your organization's financial planning and decision-making processes.

To ensure uninterrupted service and maintain a high level of uptime, we've put in place a robust suite of monitoring and alerting capabilities. Yurko explains, "Our vigilant monitoring system continuously tracks the performance and health of our cloud infrastructure and services in real-time. Our deployment strategy incorporates redundancy, allowing us to proactively safeguard against potential issues. This redundancy ensures that a problem affecting one system or component will not disrupt other incoming requests, guaranteeing uninterrupted service for our customers." At Vertex, our commitment to reliability extends beyond just meeting expectations; it's about providing you with a seamless and dependable experience you can count on.

Elasticity & Scalability

Tax processes are inherently dynamic, subject to fluctuations due to seasonal changes, legislative updates, and evolving business demands. Elasticity allows tax solutions to dynamically adapt to varying workloads, automatically provisioning or de-provisioning resources as needed. This agility ensures consistent performance during peak tax seasons while minimizing infrastructure costs during quieter periods, optimizing resource utilization, and ultimately reducing operational expenses.

Scalability, on the other hand, addresses the long-term growth needs of an organization. As businesses expand, so does their tax data volume and complexity. A scalable tax solution can accommodate this growth seamlessly, avoiding disruptions or costly migrations. This scalability also enhances your organization's ability to handle more extensive tax compliance requirements, such as managing tax obligations across multiple jurisdictions or handling increased transaction volumes.

Vertex's architecture and infrastructure use autoscaling to ensure incoming traffic or workloads are managed efficiently, without over-provisioning or under-provisioning. Our solutions can adapt to the changes in your business, new products, sales channels (BOPIS: buy online, pick-up instore, BORIS: buy online, return in-store, and curbside pickup), and expansion into new markets and jurisdictions. This eliminates the need for your team to perform manual processes and frees up those resources to focus on other business initiatives. "Our solutions can be very elastic by ramping up billing runs for peak times. We see a lot of instances where businesses make adjustments to their tax solution infrastructure for Christmas, Black Friday, and Cyber Monday, then scale them back down during those valley times", said Cameron.

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Flexibility (through integrations)

Having tax solutions that support integrations with other systems is crucial for efficient tax management and overall business operations. Integration capabilities enable seamless data exchange and synchronization between systems. For example, in eCommerce, integrating a tax solution with an online shopping cart can provide customers with accurate tax estimates at the point of purchase, enhancing the user experience and reducing cart abandonment rates. Additionally, integrations support better financial planning and reporting. Tax data can be seamlessly incorporated into financial systems, allowing for comprehensive analysis and reporting on tax liabilities and expenditures. This aids in strategic decision-making, tax optimization, and budgeting.

Vertex partners with today's leading accounting firms, consulting companies, premier technology providers, resellers, and system integrators. Our ecosystem encompasses 1,000 partners, 4,000 joint customers, and 150+ integrations. Some of our most notable integrations are with SAP, Salesforce, Microsoft, Oracle, and NetSuite. With our ease of integration, your tax team has one source of truth for all transactions across different platforms and systems, and you can rest easy knowing our solutions integrate seamlessly with your existing tech stack. "We work very closely and collaboratively with our partners to ensure our products are always working, always up to date, and compatible with each other", Yurko concludes.





Optimizing your organization’s “ilities” is a necessity. In this eBook, we’ve explored how Vertex’s cloud-based solutions excel in security, usability, reliability, elasticity, scalability, and flexibility. By considering these factors when choosing tax solutions, you align your technology with your business goals, reduce risks associated with downtime and security breaches, and improve operational efficiency. This approach not only supports your current needs but also prepares your organization for future challenges and opportunities, ensuring long-term sustainability and competitiveness.

To learn more about Vertex’s cloud-based solutions and how they can transform your tax management, visit: [Vertex Cloud Solutions](#).

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