

Premium Support Packages

Your Vertex tax technology solution includes access to our award-winning technical support accessible by phone, email, or online. In addition, you can upgrade to our Gold or Silver Support package to provide premium support services to help you resolve issues faster and realize greater value from Vertex.

Why Upgrade to Premium Support?

Vertex customers upgrade to one of our premium support packages to address a variety of business needs:

- **Complex Tax Scenario.** Your company's tax needs are complex due to the nature of your products, services, or expanding geographic footprint.
- **ERP Upgrades.** When you conduct an ERP upgrade you may want greater access to best practices and expertise to support necessary changes to your Vertex tax engine.
- **Lean Staffing.** Your Tax and IT specialists, busy with ongoing operations, have limited bandwidth to devote to supporting your tax technology solution.
- **Support Response Requirements.** Your company wants to ensure reliable access to Vertex Support for off-hour emergencies and system maintenance windows.

Benefits



Elevated Access & Response

Receive priority attention from the global Support team.



Customer Success Account Manager (CSAM)

A CSAM assigned to your account will collaborate with your tax and IT team to support your business needs and technical goals, and offer access to thought leadership to help you maximize your Vertex solutions.



Training Certifications

Enhance your teams' skills and help maintain proficiency by obtaining Vertex certifications through Vertex University. Courses cater to various experience levels.



Proactive Tracking & Notification:

Your Customer Success Account Manager will proactively keep you informed of best practices, service releases and critical changes. With an understanding of your environment and system configuration, they can often work proactively to help prevent issues.



Access to Vertex Professional Services

Access Vertex experts in tax technology and Vertex solutions. These skilled resources will provide best practices and assistance in areas like testing, configuration, tax rule setup, and ERP-related issues.



Customer Conference Passes

Free passes to Vertex Exchange conference which provides your Tax and IT staff with an opportunity to learn best practices for maximizing the value of your tax technology solution.

All Vertex solutions include Standard Support service. Customers can access our award-winning technical support representatives for assistance with standard features and functionality, how-to's, tax rates and rules. In addition, Vertex offers two levels of Premium Support. Gold and Silver Support packages are outlined below.

Support Package	Gold	Silver	Standard
Premium Access & Response			
Assigned Customer Success Account Manager (CSAM)	✓	✓	
Enhanced response times	✓	✓	
Access to elevated Support Analysts	✓	✓	
24/7 Access to Support	✓		
Access to Professional Services			
Monthly bank of hours providing access to assistance for testing, configuration, tax rule setup, connector-related issues	✓	✓	
Customer Enablement			
Access to certification courses on Vertex University	4/year	2/year	
Free passes to Vertex Exchange. Multi-attendee discount for additional passes.	4 passes	2 passes	
Phone/Email Support			
HDI-certified support analysts available by phone or email.	✓	✓	✓
24/7 Self-Service Support			
24/7 access to Vertex Community customer portal with searchable database of articles, product documentation, Support Ticket logging & tracking.	✓	✓	✓



Vertex is the only tax technology provider to earn HDI Support Center Certification recognizing a commitment to excellence, efficiency, and service quality.

To learn more, visit VertexInc.com.



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