

Vertex Configuration Agent for Microsoft Dynamics 365

Intelligent agent-to-agent monitoring and synchronization to keep configuration aligned, accelerate tax operations, and automate tax readiness in real time.

Real-Time Sync and Automated Configuration

The Vertex Configuration Agent for Dynamics 365 is an intelligent, agent-to-agent solution that transforms tax configuration management, ensuring systems remain synchronized and compliant in real time.

The AI agent autonomously monitors master data changes (business events) in Microsoft Dynamics 365 Finance and Supply Chain, and triggers tax configuration updates in the Vertex O Series tax engine. It focuses on five key areas:

- Legal entities
- Legal entity registrations
- Warehouse locations (nexus and establishment)
- Products
- Customer tax exemptions

Intelligent Tax Configuration

This innovation keeps business systems aligned, reduces manual oversight, prevents cross-system disruptions, and enables businesses to scale confidently within the Microsoft ecosystem while helping ensure accurate tax calculations, automating routine tasks, and boosting operational efficiency.

- Accelerated initial onboarding of the Vertex tax engine
- Proactive monitoring, accelerated maintenance, and faster go-live for new configurations
- Start collecting tax in new locations without delay
- Increased tax filing compliance
- Reduced manual data synchronization
- Reduced cost of tax engine maintenance
- Improved audit readiness with a traceable log of tax-impacting changes
- Increased agility to support growth

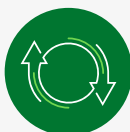
Microsoft Differentiation

Vertex is the exclusive tax compliance provider selected for participation in *Microsoft Dynamics 365 AI Engineering* initiative, showcasing Copilot Agents within Dynamics 365 Finance & Supply Chain. Vertex is a leader in agentic orchestration for tax automation and the only tax technology provider with an AI agent embedded in Microsoft Dynamics 365 Finance & Supply Chain.

Benefits



Intelligent master data orchestration



Improved process, productivity & time saving



Reduced errors and maintenance



Faster time to tax accuracy

Key Features

Real-time Sync of Business Events

The AI agent accelerates tax readiness by syncing configuration between Microsoft Dynamics 365 Finance & Supply Chain and the Vertex O Series tax engine for key business events, including:

- **New Taxpayer(s) (Company/Legal Entity):** When a new legal entity (i.e., company/taxpayer) is added in Dynamics 365, create the same legal entity as a taxpayer in Vertex O Series, where the company equates to a taxpayer. This enables tax calculations and compliance reporting in Vertex solutions. Conversely, a Dynamics 365 update will occur when a taxpayer is created in O Series.
- **New Taxpayer Registrations(s):** When a new legal entity is added in Dynamics 365, the related registration information is updated in the Vertex tax engine.
- **New Warehouse Location(s):** The addition of a new physical or legal location in Dynamics 365 automates nexus or establishment in the O Series tax engine to start collecting tax and improve accuracy of origin/destination-based tax rules.
- **New Products:** This agent monitors changes in the master data in Dynamics 365 including the introduction of a new product or service, and helps automate the establishment of a corresponding taxability driver and category mapping in Vertex O Series. Individual notices are generated so users can view each change. This speeds up tax readiness for new product launches, helps ensure correct tax treatment across the product catalog, and reduces configuration errors and manual mapping effort.

- **New Customer Exemptions:** Any new tax-exemptions set up in Dynamics 365 or Vertex O Series are synced in both systems to ensure accurate tax exemption processing and eliminate dual maintenance of data and data mismatches. The agent will keep the exemption data in sync between the two systems regardless of the origin of the change.

Microsoft Tools:

The Vertex Configuration Agent leverages the Microsoft ecosystem, incorporating advanced developer tools such as Azure AI Foundry, Copilot Studio, MCP Servers, and various large language models (LLMs) to design and deploy intelligent AI agents that drive organizational transformation.

Human-in-the-Loop to Ensure Governance:

Using a human-in-the-loop approach, the Agent provides intelligent alerts and review checkpoints for high-impact changes, enabling tax teams to validate updates before they take effect in the tax engine. This balance of automation and oversight delivers confidence, transparency, and control, so you maintain compliance without sacrificing governance.

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