

Vertex Start Service

Rely on Vertex Expertise for Your System Implementation

Vertex offers service packages to help you implement your tax engine and go live with confidence. We bring the expertise, best practices, and standardized processes from over 5,000 Vertex system implementations. Leveraging Vertex expertise can help you implement faster and ensure you maximize the value of your Vertex system. And we offer multiple service packages that allow you to handle as much or as little of the implementation project as you want — from installation and configuration through testing, go-live, and post-go-live.

Pre-defined Service Packages

Alongside our fully customizable implementation option, Vertex offers three predefined service packages that enable you to tailor your involvement in the implementation project to your preferences.

Platinum Service

In the Platinum Service, Vertex provides an enhanced, longer-duration implementation designed specifically for organizations seeking a higher level of support and service. In this model, Vertex takes an even more proactive leadership role, guiding clients through each phase of the implementation process including testing the first month of reporting with a dedicated team of experts. While Vertex manages the technical setup and complex configuration tasks, clients are still responsible for making critical tax decisions, ensuring compliance and alignment with business needs.

Gold Service

In the Gold Service, Vertex offers full implementation support for clients with limited internal resources. Vertex leads the process and handles system setup but clients retain all tax decision-making. Through hands-on training, customers learn how to manage future configurations independently after implementation.

Silver Service

In the Silver service, Vertex supplements the client's in-house implementation team by providing guidance and support throughout the project. Clients select this service when they have in-house expertise and available resources but prefer to also have Vertex consultants work with them to fill in the gaps and provide guidance throughout the project.

Bronze Service

In the Bronze service, the client manages the implementation and Vertex provides light support throughout the project. Clients select this service when they have the resources and expertise, want to manage the implementation in-house, but also want to ensure access to Vertex consultants for questions.

Vertex Start Service Packages

Service level	Platinum Service	Gold Service	Silver Service	Bronze Service
<i>Service description</i>	Vertex provides end-to-end implementation	Vertex provides comprehensive implementation service.	Vertex supplements client implementation.	Vertex provides light support throughout implementation.
Implementation tasks	Responsibility (Vertex/Client)			
<i>Work plan</i>	Vertex	Vertex	Vertex	Client
<i>Requirements gathering</i>	Client**	Client**	Client*	Client
<i>Design</i>	Vertex	Client**	Client*	Client
<i>Configuration</i>	Vertex	Client**	Client*	Client**
<i>Documentation</i>	Vertex	Vertex	Client	Client
<i>Training (functional)</i>	Vertex	Vertex	Vertex	Vertex
<i>Training (technical)</i>	Vertex	Vertex	Client	Client
<i>Go-live support</i>	Vertex***	Client	Client	Client

*Vertex will review requirements, design, and configuration.

**Vertex is available for questions during configuration.

***During regular business hours

Each implementation is a partnership and exact Vertex responsibilities and deliverables may vary. Refer to contract for complete service details. Platinum Service is 180 days; Gold & Silver Service are 90 days; Bronze Service is 60 days. Each service is renewable for 30 days if requested within two (2) weeks of original service completion. Excludes current customer migrations, retail POS implementations, and implementations with SAP, Oracle, JDE, Peoplesoft, or Workday.

Migrating from a Different Tax Engine

We draw on decades of experience getting customers up and running. If you're implementing a tax engine for the first time, we'll help you configure your Vertex system for maximum value. If you're migrating from another tax engine to Vertex, our team leverages years of experience and purpose-built tools to make the transition smooth and minimize disruption. Either way, Vertex can improve your time-to-value.

About Global Professional Services

Vertex offers a range of services to wrap around our technology solutions that streamline implementation, maximize performance, and improve tax processes to help ensure customers get the best value from our software. Vertex representatives bring deep tax technical expertise as well as shared experience from more than 2,000 customer engagements around the world. For more information, contact Vertex today at Inside.Sales@vertexinc.com.

North America | Latin America | Europe | Asia Pacific



VertexInc.com



VERX
Nasdaq Listed