Vertex Copilot

Intelligent automation to improve user experience

Vertex is transforming the way that our customers interact and use our solutions, delivering intelligent automation to provide a best-in-class user experience. Vertex Copilot is a foundational generative AI feature designed to optimize processes, onboarding, and workflow.

Intelligent transformation

Vertex Copilot is embedded across the Vertex Cloud Platform, delivering governed, explainable AI assistance that helps users work faster and stay productive. It provides real-time, contextual guidance based on vetted Vertex Community content, streamlining onboarding, troubleshooting, and day-to-day operations without disrupting workflow.

Access knowledge faster

Vertex Copilot gives users an easy-to-use conversational interface to find product answers without leaving their current workspace. When a user asks a question, Copilot:

- Identifies relevant, vetted content from Vertex Community
- Generates an explainable summary aligned with that content
- Returns links to the underlying articles for deeper detail and follow-up

A dedicated button opens the Copilot sidebar from nearly anywhere within Vertex Cloud, providing help when and where it's needed while keeping users in context.

Improve efficiency

Intelligent AI-driven automation provides the knowledge to help you accelerate:

- Implementation and configuration — surfacing product knowledge, setup steps, and troubleshooting guidance without leaving the application.
- User onboarding — providing new users with tips on how to ask questions and discover key capabilities.
- Ongoing operations — helping users resolve issues quickly, navigate complex workflows, and stay productive as tax, finance, and IT processes evolve.

Persistent conversational history allows users to revisit, search, and reuse prior interactions, reducing rework and supporting faster follow-up.

Benefits

Real-time Answers	Intelligent Automation	Improved Efficiency	Improved Usability

Key Features

The first iteration of Vertex Copilot provides a virtual assistant for self-support, documentation, and product knowledge search.

- **Interactive conversational interface**
  Embedded chat-style UI that lets users ask natural-language questions and receive real-time answers inside their current Vertex Cloud workspace.

- **License-Aware Response & Recommendation Engine**
  Copilot interprets a user's license entitlements in real time, guiding users only to features and capabilities they can actually access. This reduces confusion and improves the relevance of each response.

- **Conversation History Management**
  Users can revisit, search, and reuse past conversations across sessions, supporting continuity and reducing repeated work when resolving ongoing issues.

- **Dedicated Copilot access in Vertex Cloud**
  One-click access from nearly anywhere in the platform opens a dedicated panel without interrupting workflows.

- **Quick links to product content**
  Each answer includes links to the underlying articles in Vertex Community, enabling deeper exploration and task completion.

- **Guided prompting and new user tips**
  New users see tips for crafting effective prompts, helping them get value quickly and improving adoption.

- **User feedback mechanism**
  Users can rate responses with a thumbs up or down and add comments, giving product and support teams insight to refine Copilot over time.

Vertex Approach to AI

Vertex applies AI to reduce friction in tax and finance workflows while keeping customers firmly in control. Our approach emphasizes:

- **Transparency and explainability —** AI-generated guidance is clear, auditable, and aligned with published product information so users can verify every step.

- **Strong governance and human oversight —** Vertex AI assists but never changes outcomes silently; customers always know when AI is involved.

- **Reliable, controlled automation —** AI is introduced in ways that simplify work, surface insight earlier, and help teams stay productive without disrupting established processes.

While Vertex Copilot leverages the latest artificial intelligence technology, Vertex provides users with maximum control to decide how and where they want to deploy AI within their business.

Leverage AI across the E2E solution

Vertex Copilot is embedded within the Vertex Cloud Platform, making its in-app conversational guidance available across key solutions, including:

- Vertex O Series Cloud
- Vertex O Series Edge
- Vertex Certificate Center (including Certificate Wizard and Certificate Portal)
- Vertex Indirect Tax Intelligence
- Vertex e-Invoicing
- Vertex VAT Compliance
- Vertex Data Integrity
- Vertex Express Returns

This platform-wide approach allows customers to experience consistent, AI-assisted help across the end-to-end tax lifecycle—while maintaining a common governance and security model.

To learn more, visit VertexInc.com.

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