

Limited Availability Program

Vertex Smart Categorization

Vertex is empowering retailers to increase efficiency while improving tax accuracy with Vertex Smart Categorization. Getting tax right can be challenging for retailers. That includes accurately categorizing and mapping products and services for taxability purposes. It can be manual, error-prone, and time-consuming.

Vertex Smart Categorization leverages the power of generative AI to enable retailers to streamline product categorization and mapping used in Vertex O Series tax engine configuration. This improves the consistency and accuracy of tax determination in Vertex O Series, while helping to reduce the risk of errors, inaccurate invoicing, audit penalties and fines.

To help you gain early access to this solution, you are invited to participate in our Limited Availability Program.

The Limited Availability Program enables you to:

- ✓ Gain early access to Vertex Smart Categorization
- ✓ Become an influencer as the first users of the solution, providing feedback for future design and user experiences
- ✓ Get 3 months free use (in addition to a 12- month license).

Intelligent Tax Categorization Mapping	Analyzes and automates the association of products to Vertex tax categories leveraging generative AI GPT-based Large Language Models (LLM) guided by proprietary Vertex content and tax intelligence.
Proposed Product Category Mapping and Confidence Score	Proposes a Vertex tax category for each product uploaded, as well as a confidence score
Batch File Upload and Processing	Enables upload of large volumes of product data for processing, analysis/comparison, and categorization.
Downloadable Product Categorization Mapping & Audit Package	Enables download of product categorization mappings to track and manage product taxability categorizations, as well as the generation of an Audit Package to support mapping audit inquiries.

To participate in the Program, a customer must meet the following requirements:

Requirements & Prerequisites	
Feedback	Provide regular communication and feedback to the Vertex as agreed.
Time Commitment	Active use of Vertex Smart Categorization – 15 to 60 mins per week. Regular communication cadence with Vertex: 1 hour per week.
Implementation Timing	Limited Availability: Live January, 2025
Vertex License	Vertex O Series
Regions	U.S.-based customers (including multi-nationals with global operations).