VERTEX®

Vertex Smart Categorization

Vertex Smart Categorization transforms the tax categorization process for retailers. Quickly link product lists to Vertex tax content to make product and service categorization faster, more accurate, and reliable. Powered by generative AI models and guided by human expertise, the tool centralizes workflows, reduces categorization time, improves accuracy, and accelerates tax engine setup.

Vertex empowers retailers.

Leverage the power of generative Artificial Intelligence (AI) and Machine Learning (ML) to improve the speed and accuracy of product categorization and mapping for the Vertex tax engine.

Vertex Smart Categorization centralizes the categorization process, enhances workflow, reduces judgement errors, accelerates mapping, and ultimately improves tax accuracy, helping to mitigate audit risk, and elevate the customer experience. You'll decrease the time and resources needed to manage product categorization and accelerate new product onboarding with less risk.

Tax-Smart Categorization

The Vertex Smart Categorization tool provides automated product analysis and proposes tax* category mapping for the products entered by the user. The tool can be used at various points in the tax process, including:

- First-time product mapping during an initial O Series implementation

- Ongoing mapping of new products (or new versions of existing products)

- Validating taxability of a product catalog

supports product categorization and mapping for U.S. sales tax only

Vertex Smart Categorization uses advanced AI, powered by GPT-based Large Language Models (LLM) and Vertex's tax intelligence, to automate and analyze product associations with Vertex tax categories. The system combines responsibly governed algorithms, proprietary AI models, customer data, and additional proprietary information to enhance accuracy, particularly for supported product categories.

Boost tax processes

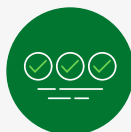AI-enabled taxability mappings accelerate tax processes:

- Utilize AI to optimize tax categorization to streamline product mapping and further increase tax accuracy when mapped in the Vertex tax engine.

- Centralize the tax categorization process to enhance workflow and minimize errors.

- Increase accuracy and predictability in tax mapping for scale in a controlled and repeatable environment.

- Boost agility to adapt quickly regardless of product catalog volume.

Vertex Smart Categorization accelerates U.S. sales tax mapping, increases time to value, improves data governance and master data management, while reducing time and effort for tax engine upkeep and maintenance.
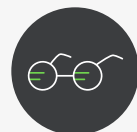
Benefits

Intelligent Process Automation

Scalable, Repeatable, Standardized

Improved Tax Accuracy

Internal Efficiency & Speed

Audit Backup

Features

Intelligent Tax Categorization Mapping

Analyzes and automates the association of products to Vertex sales tax categories leveraging generative AI GPT-based Large Language Models (LLM) guided by proprietary Vertex content and tax intelligence.

Proposed Category Mapping with Confidence Score

AI model proposes a Vertex sales tax category for each product based on the data uploaded, including a confidence score. This allows users to easily prioritize their review process, either approve and map the suggested category, or choose an alternative categorization.

Batch File Upload and Processing

Enables upload of large volumes of product data for processing, analysis/comparison, and categorization. Supports multi-user, multiple upload processing, enabling users and teams to support multiple business units, partners/sellers, and/or product segments to be supported at the same time.

Proactive product detail for user adjustment

Without leaving your workstation, relevant product attributes (when reliably sourced) are displayed directly within the application to help users make faster and more informed category decisions. Attributes like ingredients, packaging, weight, size, volume, and more are shown. If these attributes suggest a different category, users can easily access the Vertex category tree and adjust the mapping with just a few clicks.

Role-based Access

Role-based governance to manage user access to reports, notifications, and access to admin functionality and documentation of changes.

Human-in-the-Loop (HIL) review workflow & intelligence

Operational workflows guide users through validating and approving product mappings. These actions are then analyzed by Vertex Human-in-the-Loop (HIL) processes to expertly influence models, helping the system improve future categorization, exceptions, and prioritization.

Interactive User Interface (UI) & Dashboard

Easy-to-use UI with consolidated dashboard streamlines workflow and provides visibility. Drilldown into activity, quick access to perform simple tasks, links to help users pick up where they left off. Easily review category trends, recent uploads, or start a new upload. View status of uploads and mapping process. View, edit, and export mappings. Review mapping history, quickly see recent activity including audit reports and actions taken. Visibility to product mapping change history for workflow and compliance auditing.

Review & Approval

Workflow assignment for review across the organization enabling efficiency and proper approval by the right people.

Downloadable Mapping & Audit Package

Download the product categorization mappings to track and manage product taxability categorizations. Generate an Audit Package based on robust logging to support governance and audit inquiries.

To learn more, visit VertexInc.com.

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