VERTEX®

Vertex System Health Check Service

Schedule a check-up today for your Vertex tax engine to maximize performance, increase the ROI of your tax technology investment, and proactively prepare for business growth.

Time for a Checkup?

Have there been changes in your business such as expanding into new selling or buying regions, introducing new products, or updating regulations, processes, systems? Book a tax engine check-up to optimize its performance, enhance the return on your tax technology investment, and proactively position your business for future growth.

Help Ensure Relevant Configuration and Future Sustainability

Vertex Consulting offers a comprehensive Tax System Health Check Service that provides expert analysis of your Vertex solution including recommendations on how to optimize configuration and deployment based on your current tax policies.

Our team of knowledgeable professionals will assess your tax technology and provide detailed reporting based on years of expertise and best practices.

Recommended improvements may include:

- Removal of redundancies
- Configuration efficiencies
- Solution documentation
- Impact analysis for solution extension
- Support in test construction, execution, and application lifecycle management planning

Functional and Technical Review

Vertex professionals provide both a functional and technical review and deliver a written report documenting current status and recommendations for improvement.
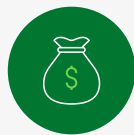
Plan for Business Growth

A Tax System Health Check can help you be more proactive in positioning your tax technology to support your growth plans. We'll help you maximize your system performance and reduce the reactive and costly workarounds to support business growth.

Benefits

Maximize
Performance

Improve
Technology ROI

Build Team
Knowledge

Prepare for
Business Growth

Tax System Health Check Service

Functional Tasks

Taxpayer Review
Identify enhancements to streamline the configuration process across all legal entities.

Taxability Driver & Mapping
Review all Tax Drivers and Mappings to ensure maximum value from the Vertex-provided content.

Tax Assist Rule Optimization
Review existing Tax Assist logic to identify improvements, unnecessary logic, and recommend a more effective use of Tax Assist functionality.

User-Defined Tax Rule Analysis
Review of User-Defined Tax rules to ensure the Vertex content is being used to maximum value and eliminate unnecessary rules where Vertex content exists.

User & User Role Cleanup
Identify Vertex users to determine if a cleanup is needed. Review and recommendations for user roles.

Scheduled vs Non-Scheduled Job Planning
Review all Vertex jobs and determine which are best for automation through the Vertex Scheduler.

Technical Tasks

Database Performance Review
Review of memory and disk space usage, assessment of stats and performance, and sizing recommendations for future growth.

Application Server Performance Analysis
Review of Tomcat setup (or any application server Vertex supports). Review of memory (Heap) and recommendations for improved performance.

OSP/Vertex Logs Analysis
Analysis of logs including transaction volume and size, and error logging.

Integration Review
Review of the integration(s) to the Vertex tax engine including schema/XML/JSON Header vs Line Item data points, memory, performance, and version review.

Environment Check
Review of the environment including load balance review, proxy setup for Vertex products, and firewall rule check for Vertex products.

Functional/Technical Report

Final report provides both functional and technical summary documentation indicating status of each function and recommendations for improvement.

About Vertex Consulting

Vertex offers a range of services to wrap around our technology solutions that streamline implementation, maximize performance, and improve tax processes. Vertex Consulting representatives bring deep tax technical expertise as well as shared experience from more than 2,000 customer engagements around the world.

North America | Latin America | Europe | Asia Pacific

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