

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 within the Vertex cloud platform, providing a foundation for a series of user enhancements to be released over time.

Access knowledge faster

In the first iteration, Vertex Copilot provides an easy-to-use conversational interface delivering rapid responses to product questions, making it easier to find answers and interact with Vertex and our products.* Copilot uses the product content found in the online Vertex Community as its source information. No user- or customer-specific information is used to generate the response. When users ask Copilot a question, it:

- Scans the available content for relevant information;
- Creates a summarized response based on that information;

- Includes links to the source articles, providing users with the secondary sources for further understanding and task management;
- All in a sidebar within the current open workspace, without disruption of workflow.

Improve efficiency

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

- Implementation
- User onboarding
- Troubleshooting
- Configuration task management
- System updates & maintenance

Benefits



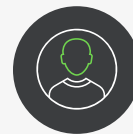
Real-time
Answers



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 Interface**
 Conversational, chatbot-like interface leverages generative AI to respond to user queries in a sidebar of the open workspace.
- Vertex Copilot or Online Customer Community**
 Users can choose to initiate the Vertex Copilot conversational query/response, or access the online Vertex Community directly.
- Real-time Q&A**
 Users can ask questions and get answers within their open workspace.
- Quick Access Links**
 Provides quick links to access product knowledge and support content directly in Vertex Community.*
- Query Tips**
 Users can access tips to engage Copilot and frame queries for maximum success.
- User Feedback Mechanism**
 Users can offer feedback regarding Copilot responses to help maximize usability over time.

Vertex Approach to AI

Vertex is taking a responsible approach to developing and deploying artificial intelligence (AI) within applications, based on the following guideposts:



- Deliver value through intelligent automation and analytics.
- Follow best practices for data governance and security.
- Provide users with maximum flexibility and control.

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 it available to all solutions across the platform, 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 (*coming soon*)

*Note: Product documentation used by Vertex Copilot has been reviewed by subject matter experts to ensure it meets our internal standards for quality and completeness. However, as a generative AI, Vertex Copilot creates responses for every question and may not always be accurate. Users should review and confirm the information provided. If users have questions about the response from Copilot, they can verify the information by reviewing the product content on Vertex Community. Links to the relevant articles used by Copilot are included with the response.

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