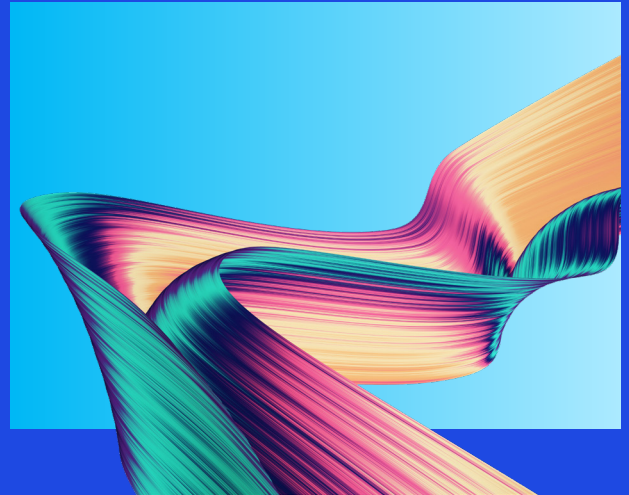




Now is the time to upgrade to Vertex O Series

Key benefits of migrating from a legacy L Series and Q Series tax engine



Why should you consider upgrading to Vertex O Series from Vertex Sales Tax L Series or Q Series?

Increasing tax requirements, tax regulations, and automation demands on the indirect tax function now require a complete indirect tax system. The newest offering, Vertex O Series, has been enhanced over the years through the product lifecycle of 6.0 through 9.0 version enhancements collected from Vertex customer improvement requests. Vertex O Series is the next-generation web-based tax engine solution that can be deployed via the cloud or on-premises. There are significant benefits to leveraging this version of the solution as you centralize tax decision-making solution and tax data repository. The table below outlines some of the key differences and value-adds between this version of the solution and legacy Vertex solutions:

Vertex O Series compared to the older L and Q Series:

Features	Vertex L and Q Series	Vertex O Series	Potential benefits with O Series
Product Taxability Updates	NO	YES	No need to research or make updates for product or service taxability law changes—Vertex research team maintains 3,550+ tax categories and 120,000+ pre-populated rules
Consumer Use Tax Solution	NO	YES	Supports procurement transactions—automatic use tax accruals and vendor tax invoice verification
International Taxability Content	NO	YES	International tax content for over 240 countries for value-added tax/goods and services tax
Telcom Taxability Content	NO	YES	Telcom tax content for traditional and nontraditional communication services
Exemption Certificate Module	NO	YES	Manage exemption certificates and remove the maintenance burden of renewals
Cloud Deployment	NO	YES	Cloud host option to manage technology changes, and minimize server maintenance and infrastructure
End of Product Lifecycle	YES	NO	Vertex L and Q costly extended support approaching end of life

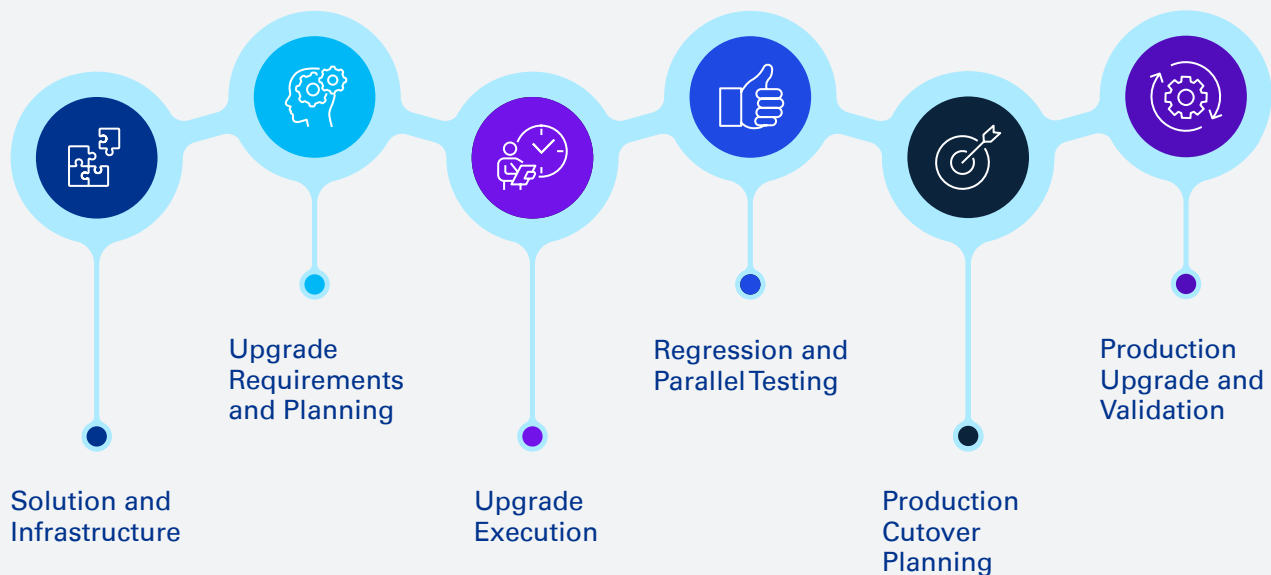
The table highlights valuable potential benefits of Vertex O Series, such as researched taxability content, automatic product taxability updates, cloud host options, and exemption certificate management tool, but there are many more valuable features.

How KPMG can help

Current Vertex customers migrating from Sales Tax L/Q Series to Vertex O Series will need proper planning and execution to ensure a successful upgrade and data migration. KPMG has extensive experience helping clients with their Vertex upgrade process across a wide spectrum of enterprise resource planning and system infrastructures. KPMG professionals are also backed and supported by a network of Vertex professionals and consultants.

We deploy a measured approach of requirements gathering and planning, upgrade execution, and regression testing to help ensure that your system is on the latest platform and calculating taxes as you would expect. We have a number of KPMG custom-developed toolkits that we leverage on Vertex upgrade projects to streamline the process and to run automated regression testing of your configuration. This streamlines the upgrade process and provides extra assurances that your tax policy requirements have been implemented properly in Vertex O Series.

KPMG implementation methodology for Vertex O Series upgrade projects



The value of an upgrade with KPMG

Keeping your Vertex instance up to date with the latest technology is critical to your business. Whether you are on Vertex L, Q, or O Series, the ability to properly calculate and report indirect taxes is critical to your organization and is dependent on an accurate indirect tax solution.

In order to manage indirect tax for the long term efficiently in a world of ever-changing tax legislation and business challenges within indirect tax, it will be important to successfully upgrade to a complete indirect tax solution—Vertex O Series.

KPMG has the right experience and technology toolkits to help your organization through the upgrade process. We follow a tested methodology and streamlined approach to help ensure the Vertex system is upgraded successfully and that your critical core billing and purchasing processes are not negatively impacted by the upgrade process.



KITT dashboard

Examples of how the KPMG Indirect Tax Toolkit (KITT) can streamline your upgrade to Vertex O Series:

- Automatically compare tax results from Legacy Vertex L and Q Series to newly upgraded Vertex O Series
- Instantly create wide net volume testing of all configurations in all registered jurisdictions
- Load master data and exemption certificate configuration efficiently
- Cleanse master data location addresses to validate correct tax rate to be applied

Contact us

For a detailed comparison of Vertex O Series to legacy L and Q Series, or to schedule a Vertex upgrade consultation, please contact:

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