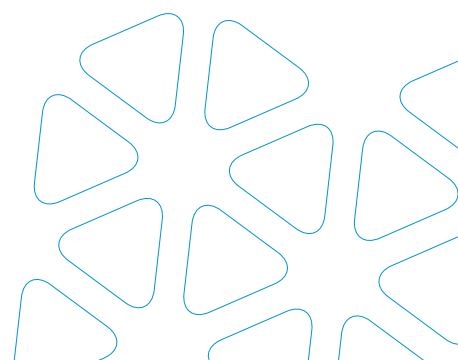# Vertex: Automated Tax Filing, State by State

A STORY OF OWNING CHANGE

Vertex Inc. ramps up robotic process automation (RPA) support to handle state-specific tax filing requirements.

Vertex Owns Change

Vertex, a tax compliance solutions provider, aimed to develop and refine their RPA bots to efficiently manage spikes in activity during monthly tax filing cycles. By doing so, they could significantly reduce the time spent on manual processes necessary to support their customers. The benefit has allowed Vertex's tax professionals to focus on higher-value activities instead.

THE CHALLENGE: NAVIGATING STATE-SPECIFIC FILING RULES

Expanding Support To Enable Growth in Additional States

Vertex provides integrated tax technology solutions to business owners in <u>multiple states</u>, each with a unique set of compliance protocols, which adds complexity. Tax filing is a monthly requirement for commercial businesses, and the subsequent spikes in activity can create strain for Vertex's internal resources. Manually addressing customer issues became an increasingly challenging task, so they began experimenting with RPA solutions to automate repetitive tasks.

The RPA bots, however, required a high level of customization. It was also crucial to have 24/7 expert support available to troubleshoot code and provide fixes, not just for Vertex's internal processes but for the individual state websites as well. These sites, which process the tax filings, frequently change and sometimes go down. To be effective, the RPA bots would need to be robust enough to handle those issues. As a trusted partner with a deep understanding of Vertex's inner architecture, TEKsystems was ready to support.

OUR SOLUTION: DELIVERING RPA EXCELLENCE

Streamlining Implementation and Support for Automated Processes

Our goal? Help Vertex build an RPA Center of Excellence (CoE) to provide leadership and best practices as we optimized their processes. The metric for success? Reducing the number of system exceptions, which occur when a bot cannot complete a task and creates a ticket that must be reviewed and resolved manually. An RPA process with fewer exceptions means more items handled by automation, which alleviates internal constraints and resources.

We solved for multiple forms of exception scenarios, including:

- Screen navigation issues
- PDF save/download errors
- Authentication exceptions
- Incorrect credentials
- Validation failure

To do this, our experts established a support process that stops the automation and diagnoses issues in real time. We troubleshooted and performed comprehensive testing for the bots, informed by Jira tickets that we logged for all exceptions that occurred during filing periods.

Our success over time came from making pragmatic, incremental improvements to the overall process. We used a problem-solving mentality to analyze the unique challenges Vertex faced in each state and come up with fixes that reduced the number of exceptions the bots encountered. Sometimes, this meant recommending a new technology or finding a more efficient way to complete a task.

POWERFUL PARTNERSHIP: A GROWING ROSTER

Refining Models To Support Work From Additional States

As the engagement went on and our bots became more efficient, Vertex entrusted us with additional workloads from other states in their network. We provided round-the-clock support to maintain a low system exception rate while gradually increasing the volume of filings the bots processed. Refining the RPA bots allowed us to solve the most common issues early on, and our thorough documentation process provided critical context for more unique errors down the line.

Real-World Results

As of Q2 2024, Vertex's RPA bots now manage filing and remediation tasks across more than 10 states during peak demand. They have successfully processed over 7,000 returns automatically, saving Vertex hundreds of hours of manual labor, a number that will continue to grow. This efficiency not only enhances their ability to scale and serve more customers but also allows Vertex to have the resources to focus on building deeper connections and creating exceptional customer experiences.

With the power of a robust RPA solution behind them, Vertex will continue to simplify tax compliance for business owners.

3x
more filings automatically processed

193%
increase in items completed year over year

About TEKsystems and TEKsystems Global Services

We're TEKsystems. We accelerate business transformation for our customers. We bring real-world expertise to solve complex technology, business and talent challenges—across the globe. We're a team of 80,000 strong, working with over 6,000 customers, including 80% of the Fortune 500 across North America, Europe and Asia, who partner with us for our scale, full-stack capabilities and speed. We're strategic thinkers, hands-on collaborators, helping customers capitalize on change. We're building tomorrow by delivering business outcomes and driving positive impacts in our global communities. TEKsystems is an Allegis Group company.

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