



# An IT Leader's Guide to Saving Money, Time & Resources with a Tax Engine

Why you should consolidate tax across a complex tech stack



# Introduction

As an IT leader, you're under more pressure than ever to deliver scalable solutions—all while navigating complex security demands and evolving technology concerns. Every time you add a new system to your tech stack, it increases the number of applications tied to core processes like purchasing, invoicing, e-commerce, and billing. And because each of these requires accurate, compliant tax calculations, your team's responsibilities grow.

That includes managing tax rates and calculation formulas, tax-sensitizing business data, and customizing tax logic across multiple ERPs, e-commerce platforms, and procurement systems—not to mention maintaining integrations, troubleshooting across platforms, and more. To put it simply, in a disconnected environment, tax becomes a technical challenge for IT.

To help you navigate these complexities, we've created this guide which explores the real-world impact of managing tax processes across disparate source systems. You'll learn how our centralized tax engine, Vertex O Series, can help your IT team save money, time, and resources—so you can focus on driving innovation and delivering business value.



# The Problems with Disparate Systems

## The Financial Drain

You may be maintaining—and paying for—a separate tax engine connected to each of your source systems to deliver complex tax calculations. This means duplicate licensing and subscription fees that eat into your IT budget. But the financial impact doesn't stop there. Managing integration touchpoints and security protocols across multiple applications adds up quickly, increasing your total cost of ownership.

Another hidden cost lies in audit penalties from threshold mismanagement. In the U.S. or abroad, each taxing jurisdiction has its own threshold at which companies must register, collect, and remit sales tax. When transactions to a single jurisdiction are spread across multiple systems, it becomes difficult for your tax team to monitor cumulative activity and remain compliant. This lack of visibility can result in incorrect tax collection—and ultimately, costly audit penalties that impact your bottom line.

## The Time Sink

If you rely on the native tax calculation functionality embedded in each of your source systems, your IT team spends significant time updating tax content, tax-relevant master data, and custom tax logic in each one. These updates are required regularly as tax rules, product catalogs, and customer data changes. Your time commitment scales with the number of systems you must maintain. If your enterprise uses five separate ERP and e-commerce systems, that's five separate updates every time.

Plus, maintaining this approach isn't simple. It often requires creating detailed documentation, including complex environment matrices that map where and how tax content is applied. When issues arise—such as incorrect tax applied at checkout or on an invoice—troubleshooting becomes a scavenger hunt. Your team spends time tracing the problem across multiple systems, often involving cross-departmental collaboration to identify the root cause. And when exemption certificates are misapplied or missing, IT is left scrambling to resolve the issue while tax teams manage the fallout.

Backup and recovery processes are similarly affected. With tax data spread across platforms, your team must manage multiple backup strategies. This adds overhead and increases recovery time in the event of a failure, putting business continuity at risk.

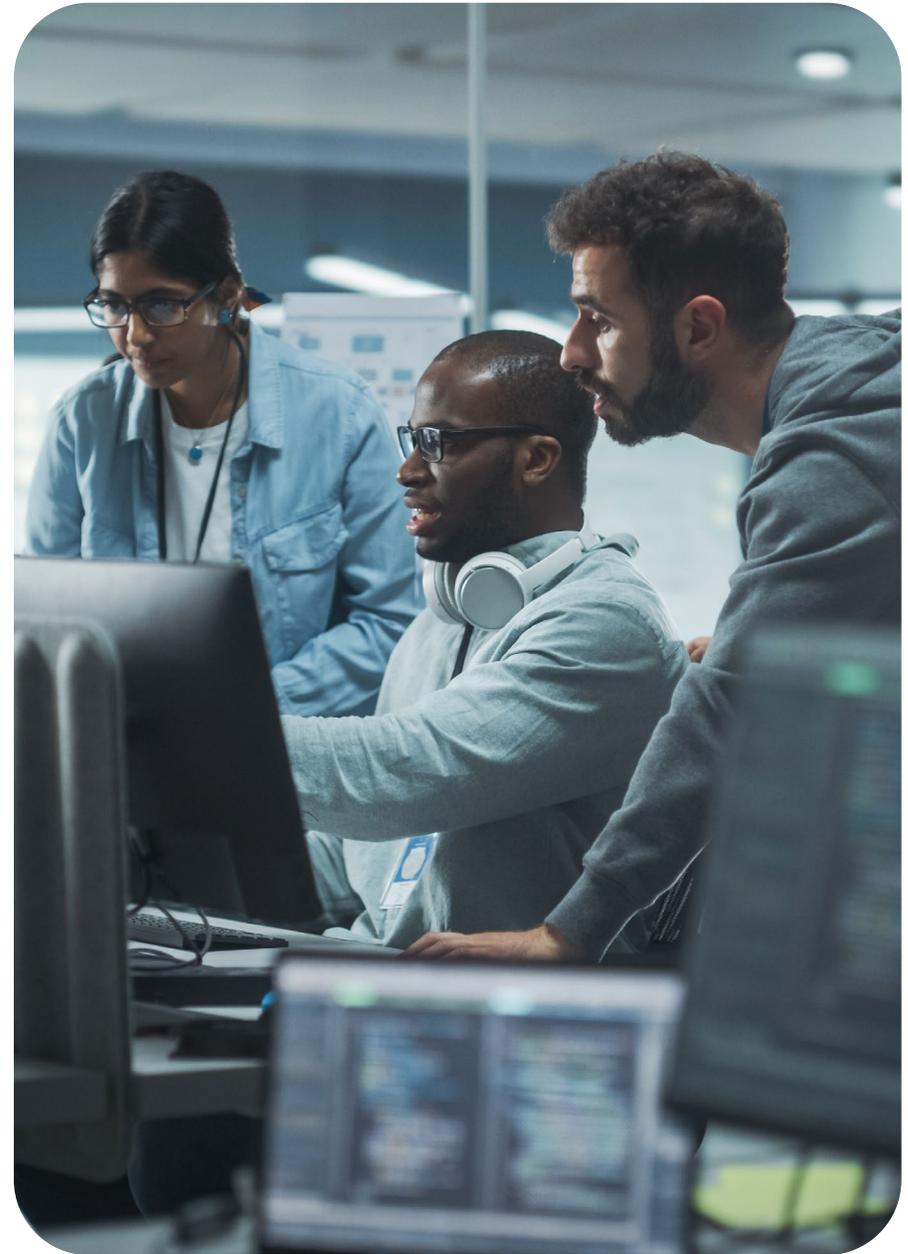


## The Resource Strain

Managing tax across multiple systems increases the complexity of IT staff onboarding and training. Your team must learn the nuances of each system, increasing ramp-up time and potentially creating knowledge silos. If a team member leaves, that knowledge may walk out the door with them. This is particularly risky and hard to replace as IT personnel who understand enough about tax to properly assist is a unique skill and can take time to upskill.

Scalability can also strain resources. Launching a new store, entering a new region, or adding a new product line all come with tax implications—and those must be addressed wherever tax is calculated. The number of resources required to prepare for these events grows with the number of systems that need to be updated.

And it's not just about scale—it's about complexity. Managing cross-border transactions, third-party scenarios, and drop-shipments introduces layers of tax rules and jurisdictional nuances. What may seem like a simple calculation on an invoice is rarely simple in practice. Without centralized control, the risk of under- or overcharging tax increases, along with the burden on IT to ensure accuracy across fragmented systems.



# How Vertex O Series Solves the Problem

Our tax engine, Vertex O Series, provides you with a smarter, centralized approach to tax determination technology. Instead of managing tax logic in every source system, O Series can be implemented as a single tax engine to support all of them—ERP, e-commerce, point-of-sale, procurement, and more. With O Series, your IT team supports one tax system that informs all financial systems. Tax requirements and content is in one place, giving you the following benefits:

## Money: Reduce Costs

- **Cut costs across the business.** O Series centralizes tax content, which eliminates the need to license, support, and maintain multiple tax engines. O Series also has many deployment options including edge technology which provides flexibility and control.
- **Minimize audit penalties.** Centralizing tax policy logic in O Series helps prevent costly errors that can impact your bottom line.

“Cost is often the biggest hindrance to businesses being able to sustain long-term success. However, with a single Vertex tax engine integrated across all source systems, you gain much needed cost efficiency”, explains Phil Yurko, Vice President, Commercial Infrastructure at Vertex.



## Time: Eliminate Redundancy

- **Stop wasting time on repetitive updates.** With O Series your IT team only needs to make updates once—no more time spent on tax content updates across the enterprise. It also reduces the time spent planning and maintaining complex documentation.
- **Troubleshoot faster.** O Series makes it easier to identify and resolve issues—no more chasing logic across platforms. When exemption certificates are misapplied or missing, having a centralized system helps IT respond quickly and accurately, minimizing disruption.
- **Simplify backup and recovery.** Managing one tax engine means managing one backup strategy—saving time and reducing complexity. Built-in redundancy and failover in O Series helps eliminate the volume and processing constraints that tax customizations often place on core systems, especially those requiring complex configurations.

Yurko explains, “With a Vertex tax engine, IT teams get a lot of time back in their day because they don’t have to bother with the manual tasks of updating tax content in multiple ERP/source systems. Tax content is automatically updated in the tax engine in the cloud. Everything is right there for tax teams to view and make adjustments to, eliminating the need to lean on their IT counterparts for ongoing support.”



## Resources: Free Up IT and Accelerate Scalability

- **Improve onboarding and reduce silos.** With O Series your team only needs to learn one system, eliminating the need to master multiple tax configurations across ERPs, e-commerce platforms, and procurement systems. With a single source of truth, knowledge is easier to document, share, and retain—minimizing the risk of silos and knowledge loss.
- **Scale faster with less IT lift.** Whether you're launching a new store, entering a new region, adding a business line, migrating source systems, merging/acquiring another company, or supporting a homegrown build—O Series gives you the flexibility to configure tax once and apply it for every business need. Even if you want to keep data separate, our O Series Edge solution lets you compartmentalize by legal entity, region, process, or function—whatever your architecture requires.

“By integrating a single tax engine to all source systems, tax is centralized in one system which adds agility for the IT team. Tax processes are no longer putting the brakes on growth to allow time to get multiple systems ready, states Yurko. “Companies can easily add new tax content or a new connector, update the configurations in one place, and respond to opportunity with speed.”

## What Enterprises Gain by Centralizing Tax with O Series

- Connects to all your source systems
- Reduces the risk of errors across platforms
- Cuts licensing and infrastructure costs
- Scales effortlessly with your business



# Customize O Series to Meet Your Business Needs

- **Deployment Options:** Cloud (SaaS), Edge, Hybrid Cloud, On-Demand Cloud, On-Premise
- **Integrations:**
  - **ERPs:** SAP, Oracle, NetSuite, Microsoft, Salesforce, Workday, and more
  - **E-Commerce:** Shopify, Adobe Commerce, commercetools, Mirakl, Spryker, and more
  - Extensible API architecture available
- **Security:** SOC 2 Type 2 industry-standard certificate
- **Support:**
  - **Implementation Services:** Over 2,000 successful implementations with our Global Professional Services Team
  - **Customer Support:** Won the [IDC SaaS Customer Satisfaction Award](#) for Tax three years in a row—leading in customer satisfaction for SaaS tax solutions



## Customer Story: Vertex Helps Siemens Consolidate 50+ ERP Systems

When it comes to transforming your tax technology, choosing a provider you can trust is essential. At Vertex, we partner with some of the world's most complex enterprises to simplify tax across their systems. Hear how one of our customers, Siemens, successfully consolidated over 50 ERP systems and streamlined their tax operations with Vertex.

Hear from Siemens' Head of Functional Excellence, Andrea Spandau.

[Watch Customer Story.](#)



## Ready to Simplify Your Tax Tech Stack?

With four decades of market leadership in tax technology, Vertex helps you cut through complexity to simplify tax tech.

[Visit our O Series page to learn more.](#)

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