# VERTEX®

Why Oracle Users Should Move to the Cloud—And Take Their Tax Engine with Them

In today's hyper-connected, fast-moving world, transformation is no longer optional—it's imperative. Businesses face mounting pressure to adapt to a digital-first economy where agility, intelligence, and scalability define success. This shift is being driven by a convergence of foundational forces: the migration to cloud-based platforms, the rise of artificial intelligence (AI) and machine learning (ML), and the growing demand for real-time data access and automation.

From a tax perspective, expanded requirements around real-time reporting—such as e-invoicing—and the increasing need for analytics to support better decision-making, combined with rapid changes in rates and regulations, are driving demand for cleaner, more granular, and complete tax compliance data. This evolution also calls for a more strategic approach to tax data governance.

To remain competitive and agile in the face of this business complexity, many Oracle customers are considering an ERP transformation to the cloud to better manage their business. But what really are the benefits of making such a shift and how does it impact tax? In this e-book we will walk you through:

- The benefits of moving your on-premise e-Business Suite, JD Edwards, and PeopleSoft ERPs to Oracle Cloud ERP

- Why your tax engine should be included in your move to the cloud

- Two migration pathways Oracle customers could take, including highlights of Oracle Cloud Infrastructure (OCI) and Vertex Accelerator for Oracle Cloud ERP

- A summary of Vertex and Oracle's Partnership
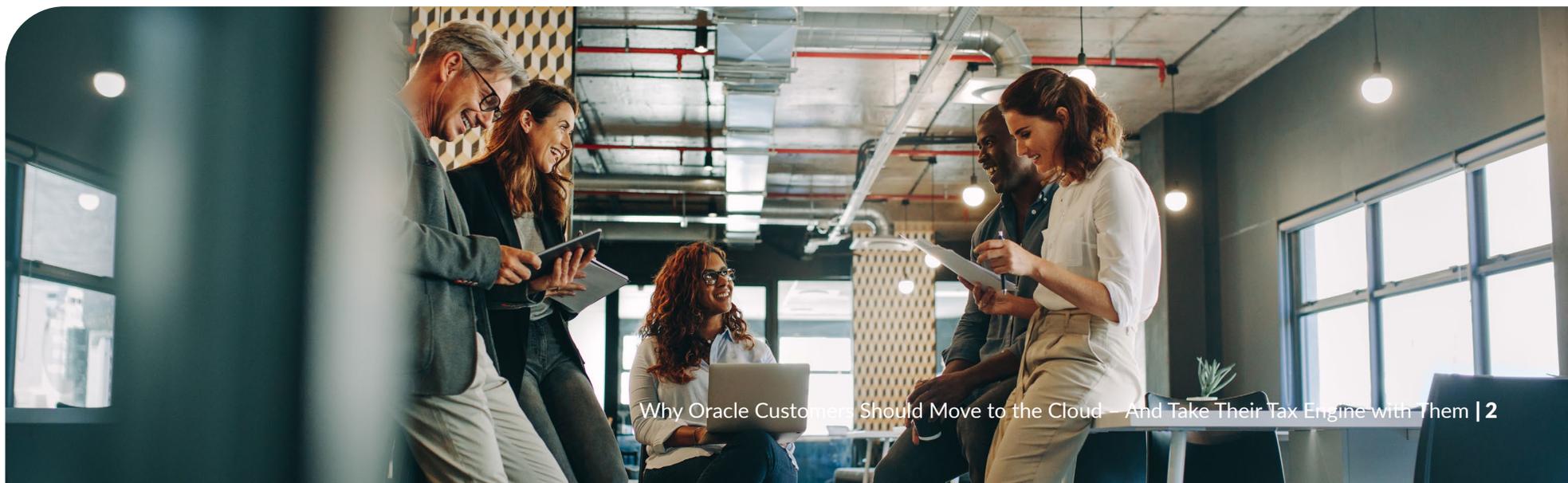
Benefits of Moving Your On-Premise ERP to Oracle Cloud

Oracle customers can gain a multitude of benefits by moving their on-premise ERP to Oracle Cloud ERP or Oracle Cloud Infrastructure (OCI) including:

- **Lower costs:** With Oracle Cloud ERP and OCI you are only required to pay for the amount of shared storage network and computing capacity you need. Oracle also provides credits (discounts) to cloud customers.

- **Higher security:** Oracle builds security into all of their cloud solutions—including Oracle Cloud ERP and OCI—at the architectural level, so you have full-stack protection and a platform that's secure by design.

- **Automatic updates:** Oracle Cloud ERP and OCI get continuous, automatic software updates so there is no need for you to buy an upgrade package and install it or pay for specialized services to perform the software upgrade.

- **AI-driven insights and automation:** Oracle Cloud ERP and OCI provide the advanced infrastructure your tax solution is built on. Foundational capabilities like AI-driven automation, anomaly detection, and predictive insights help streamline operations and accelerate decision-making across the enterprise.

- **Enhanced data governance and compliance:** These same foundational capabilities extend to data governance and compliance. With built-in tools for data lineage, access control, and auditability, Oracle supports strong governance frameworks that help ensure regulatory compliance and maintain data integrity—creating a secure, scalable backbone for your tax processes.

- **Integrated supply chain agility:** Oracle Cloud ERP includes robust SCM modules that unify planning, logistics, procurement, and manufacturing—enabling businesses to respond quickly to disruptions and optimize operations end-to-end.

- **Decreased maintenance time:** With Oracle Cloud ERP or OCI, maintenance tasks, such as applying security and technical patches as well as maintaining the operating system and applying updates, are all performed by Oracle.

- **Easier scalability:** With Oracle Cloud ERP or OCI you can increase or decrease resource usage as needed so that your ERP can grow with the business.

- **Better accessibility:** Oracle Cloud ERP and OCI are accessible from any device—laptops, smartphones, tablets—with an internet connection and a browser, making it possible to input, compile, and collaborate on data from anywhere.

Two Paths for Oracle Users to Move to the Cloud

For current Oracle customers who utilize eBusiness Suite, JD Edwards, or PeopleSoft as their on-premise ERP of choice, there are two pathways to choose from in order to migrate those systems to the cloud.

	Cloud Migration Option A	Cloud Migration Option B
Summary	"Lift and shift" your (eBusiness Suite) JD Edwards, or PeopleSoft) on-premise ERP to OCI (a cloud solution).	Migrate from your (eBusiness Suite, JD Edwards, or PeopleSoft) on-premise ERP to Oracle Cloud ERP (a SaaS solution).
Benefits	• Still maintain the benefits of being in the cloud without having to lose control over your application and the customizations that you've already made.	• Streamlines the hosting and maintenance of the application, because Oracle takes care of everything. • Updates are rolled out routinely, eliminating the need for system upgrades and maintenance
Success Story	Mazda Cuts Costs 50% on OCI	Western Digital consolidates finance apps with Oracle Cloud ERP

OCI is a complete cloud infrastructure platform with the services that companies need to migrate, build, grow, and scale all their IT workflows. "If you were to do everything on your own, with your own hardware, it's going to cost significantly more in terms of IT budget," Sheera Deepak, Director of Product Management at Vertex said. "OCI has everything built in, with the right blend of applications and the tech to support data visibility."

Why Your Tax Engine Should Be Included in Your Move to the Cloud

When systems change, tax can't be an afterthought. Vertex helps tax teams stay audit-ready, globally compliant, and in control—even during ERP transitions. With our real-time calculation engine, deep jurisdictional content, and seamless Oracle integrations, you can modernize without sacrificing control. Major benefits of including your Vertex tax engine in your cloud migration include:

1. **Improved tax accuracy:** Tax software is particularly challenging to maintain and is only becoming more complex. There are more than 19,000 tax jurisdictions in globally, with categories and rates that change frequently. Moving your Vertex tax engine to the cloud means Vertex updates the tax content regularly to stay on top of changing regulations. Updates are invisible and pre-tested so that users never need to worry about the impact on operations. This shift also improves the granularity and accuracy of your tax compliance data, supporting all related global business and tax processes. Plus, your internal IT staff are freed from the monotonous task of applying updates and can work on more strategic tasks.

2. **Better customer experience:** Compiling reports for quarterly or annual tax filings is made more difficult when reports are amended because of outdated calculations or because exemption certificates were lost or not kept current. These and other factors can force you to file extensions and amendments. Because cloud-based tax software is always up to date, your risk of errors and oversights are minimized. A cloud platform also automates other error-prone tasks such as maintaining exemption certificate currency.

3. **Reduced latency and improved performance:** With your tax engine in the cloud, you can more easily integrate across your enterprise single cloud-based engine. That means everything will be on the same platform so you can reduce latency and improve performance.

Moving to the cloud helps companies gain a competitive advantage—and keep their customers happy. "Your customer satisfaction is number-one and without this type of modernization that's going to be impacted and your competition is going to be ahead of you," said Sheera Deepak, Director of Product Management at Vertex.

Vertex Can Support You No Matter Which Path You Choose

We understand that every organization's path is different. That's why we offer flexible commercial terms and implementation models tailored to your specific needs. Whether you're navigating complex timelines, resourcing challenges, or deployment strategies, we're here to support you—on your terms.

Our goal is to minimize disruption and cost while ensuring your tax compliance remains intact. Our dedicated global team of Oracle-certified pre- and post-implementation service and support specialists has successfully completed thousands of projects and migrations with our joint customers.

OCI Users Can "Lift and Shift" Their Tax Engine with Vertex

Did you know that Vertex was the first tax technology provider to be able to integrate and host applications in OCI? We have our own OCI instances, deployed around the world, where you can deploy Vertex O Series as well as our integration for Cloud ERP. Therefore, if you're also hosting your application, everything can remain in the same environment—reducing latency and boosting your performance.

- We were the first tax technology provider to launch our own OCI application.

- We are the first tax technology provider to build our own certifications, both powered by Oracle Cloud and integrated with Oracle Cloud.

- Customers leveraging Vertex tax solutions with their Oracle applications on OCI experience, on 20% AR and 14% AP performance improvements.

- Our customers have processed more than 1 billion transactions on OCI.

- Vertex is the only tax technology vendor with solutions deployed in region on Oracle Cloud with data centers in the US and Frankfurt, Germany.

"The Vertex O Series solution powered by Oracle Cloud Infrastructure represents a strategic collaboration that enables both companies to capitalize on the natural synergies of their best-in-class solutions in enterprise cloud applications," said Dave Profozich, Senior Vice President, Oracle ISV Ecosystem, Oracle. "The Vertex relationship represents the type of investment that Oracle is making in the Independent Software Vendor (ISV) ecosystem surrounding our platform to bring greater functionality to the enterprise and help facilitate partner growth."

Cloud ERP Users Have the Added Benefit of Vertex Accelerator for Oracle

Developed by our team of Oracle Cloud ERP experts, the Vertex Accelerator is a next-gen integration that brings critical benefits.

Hosted on OCI—it's the first integration of its kind to receive validation to both integrate with and be powered by Oracle Cloud Infrastructure (OCI)—the Vertex Accelerator is a single, automated solution that helps enterprises integrate their payables and receivables. It simplifies processes with its easy to-use, intuitive onboarding dashboard, and allows for nearly push-button setup of the Vertex tax engine. Features and functionality include:

- Onboarding dashboard to automate customer configuration steps and view progress. Easily onboard multiple instances faster.

- Data enrichment improves tax accuracy and reporting with richer transaction details.

- Automated data mapping, tax actions, and custom rule setup improves efficiency.

- Transaction monitoring improves visibility, troubleshooting, and issue resolution.

- Master data import reduces time and manual data risks.

- Report scheduling automates data extracts and reports to reduce steps and streamline operations.

- Real-time testing increases efficiency during pre-go-live and post-go-live.

With its powerful interface, it streamlines integration processes and reduces implementation risks.

"The Vertex Accelerator expedites growth and helps companies to move to the next step in their digital transformation," Deepak explained. "It's the sweet spot for anybody thinking about digital financial transformation, with everything in one place."

Vertex was recognized globally as Oracle's Change Agent Partner of the Year, for our innovative development of the Vertex Accelerator for Oracle Cloud ERP and our leadership integrating our solutions with and enabling hosting on Oracle Cloud Infrastructure.

Customer Spotlight: Black & Veatch

Black & Veatch, a global engineering and construction firm, successfully migrated from a highly customized on-premise E-Business Suite to Oracle Cloud ERP to reduce complexity and modernize operations. By consolidating ERP instances and leveraging Vertex's OCI-native tax engine, the company streamlined compliance and eliminated the need for additional configuration. As Clifford Yeager noted, "It was just one less thing I had to worry about because Vertex partnered with Oracle and took care of that". This transformation enabled Black & Veatch to improve ROI and simplify back-office processes—demonstrating the power of a true cloud migration strategy.

Discover how Black & Veatch achieved operational efficiency and tax compliance in the cloud.

Read More

Summary of Vertex and Oracle's Partnership

For over 25 years, Vertex and Oracle have worked closely together to accelerate transformation, drive innovation, and better business outcomes for our joint customers.

- The partnership between Vertex and Oracle is the longest standing of any tax technology vendor and spanning the acquisition of numerous Oracle solutions (JD Edwards, PeopleSoft, NetSuite, etc.).
- Oracle and Vertex contingents meet every two weeks over a collaborative forum.
- Oracle trusts Vertex solutions to manage their own tax and compliance needs.
- Oracle and Vertex serve over 2,000 joint customers. The average tenure of a Vertex customer is over 18 years.
- Vertex has a 100% implementation success rate for Oracle Cloud ERP customers.
- Vertex is the only tax technology partner to have been recognized 3 times with Oracle's ERP/EPM ISV Partner of the Year and Visionary Awards.
- Vertex is the only provider with HDI-certified support and Oracle-specific services.
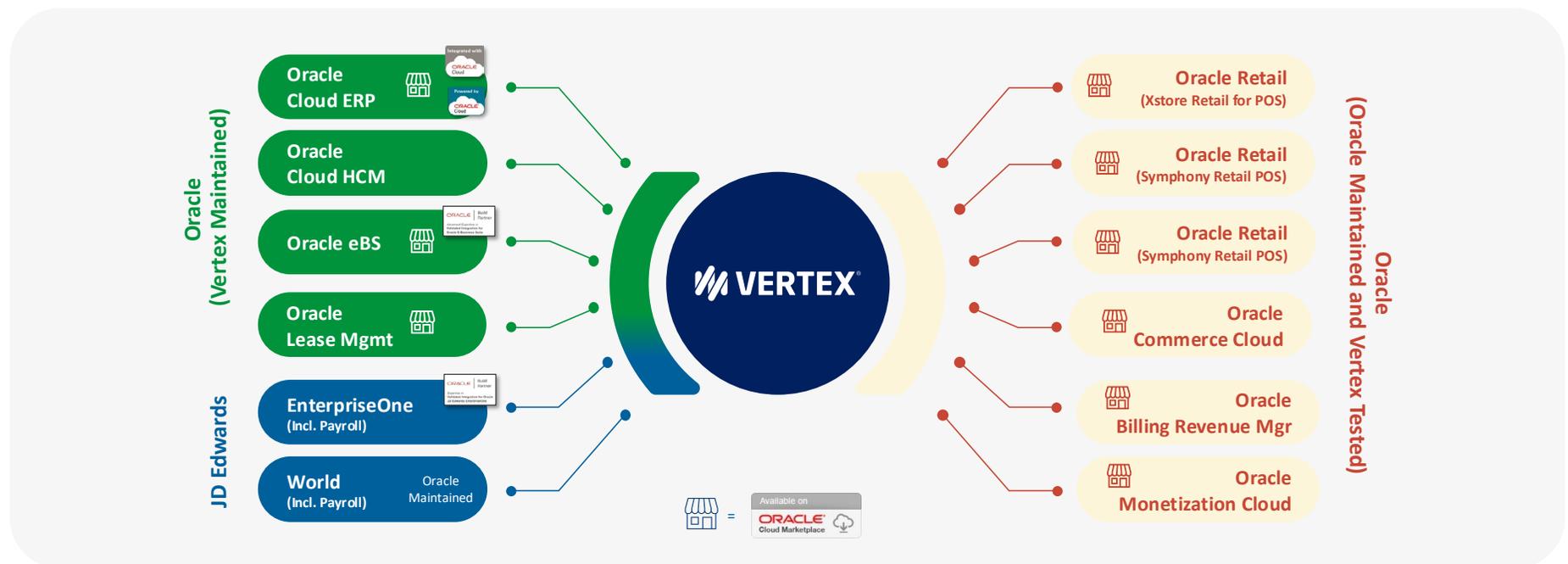
Built and strengthened on the principle of a trusted relationship, our partnership allows customers to benefit from automated tax technology and integrated solutions that streamline tax determination and compliance, across critical business functions in the enterprise, and around the world. More than just a partner, Oracle also relies on Vertex Indirect Tax Solutions to meet its own global business needs. As member of the Oracle Partner Network (OPN), Vertex has been recognized as an Oracle Build Partner, who has achieved both Powered by and Integrated with Oracle Cloud. Vertex is also a member of NetSuite's SuiteCloud Developer Network.

> "Our commitment to OCI represents the natural evolution of our 25-year partnership with Oracle, enabling Vertex to further differentiate its offerings and support our customers' diverse set of requirements", said Chris Jones, Chief Revenue Officer, Vertex Inc.

To learn more visit: **vertexinc.com/partners/oracle**

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