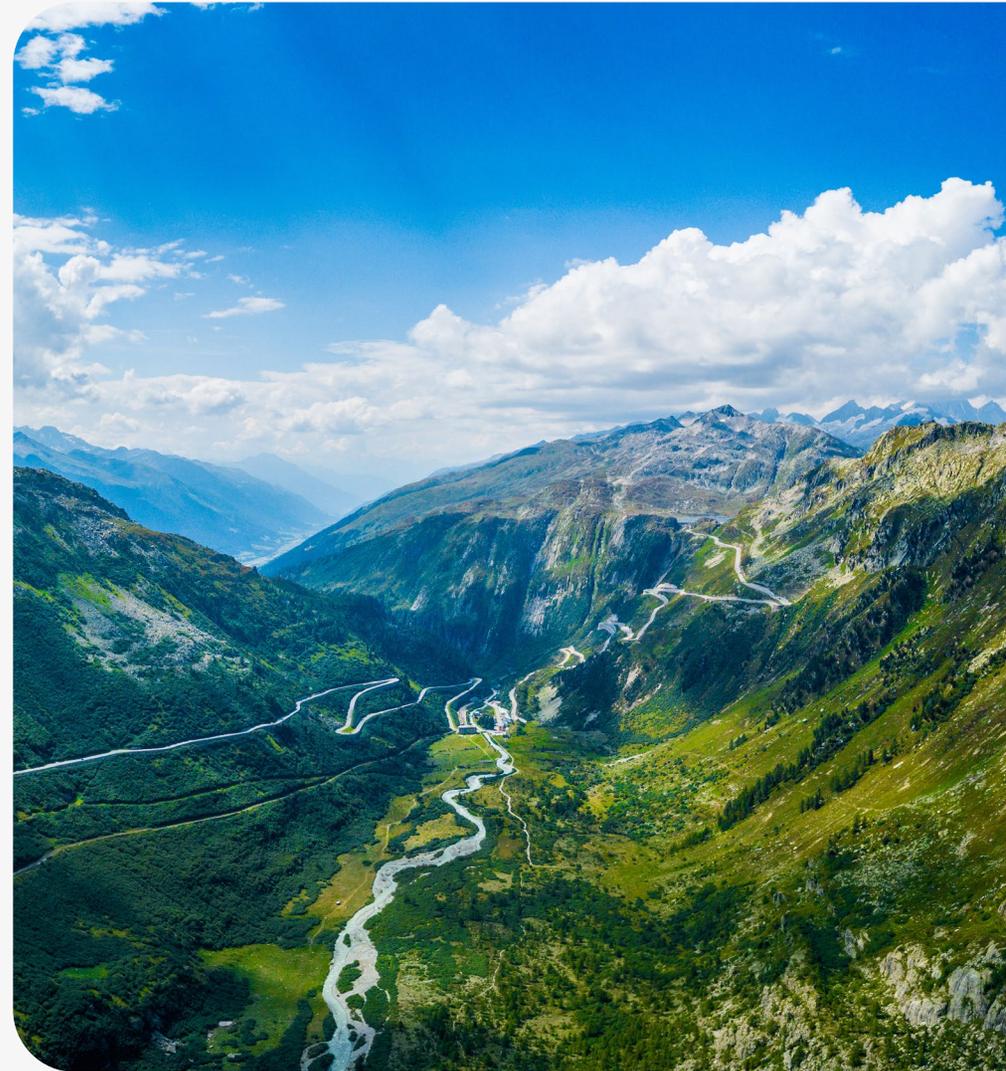




From Cracks to Stability: Why Implementing the Right Tax Engine to Complement Oracle Is Worth the Effort



Introduction

Imagine driving through a neighborhood you admire and spotting the perfect house. The timing is perfect—you're outgrowing your current house, you'd like to have the latest features, and you need extra space to allow for growth so you don't need to move again. You consider the long-term benefits and the fact that a short-term inconvenience could lead to living in your dream home.

For many companies, deciding to add or switch tax engines to enhance their Oracle investment feels the same way. They're outgrowing their current processes and/or system, they need modern features to support their business, and they need the ability to scale to support growth.

This e-book will help you identify the cracks in your current tax compliance foundation before they widen into serious financial and operational risks. Choosing the right tax technology provider can simplify the transition and deliver lasting improvements for your team and business.

Here's what to consider in your next tax engine provider—and why making the switch is worth the effort and helps further power your Oracle infrastructure.



A Clear Focus on Indirect Tax

Some tax technology providers are doubling down on direct tax, drawn by its larger customer base, reduced competition and higher win rates. This means fewer investments in indirect tax, leading to less focus on innovation for indirect tax, unreliable technical support and, in some cases, product discontinuation.

Where does this leave your business? You may find yourself using outdated indirect tax tools with no clear roadmap for future improvements. The lack of focus on indirect tax can result in products reaching the end of life without a clear migration path, increasing your compliance risks and operational inefficiencies.

The Vertex Solution

For over 45 years, Vertex has been singularly focused on indirect tax. It's our entire business—not an afterthought or a secondary offering. And when it comes to Vertex and Oracle, the average tenure of the customers using our solutions is 18 years. In addition, Oracle and Vertex have been development partners for 30+ years and currently have 2,000 joint active global customers.

“We are 100% committed to indirect tax solutions, ensuring that our investments, innovations, and resources remain dedicated to delivering the most advanced sales, use and value added tax calculation and compliance tools available,” says Michael Bernard, VP - Chief Tax Officer at Vertex.

The reason for these long tenures is because Vertex provides Oracle customers with the innovation, expertise, and integrated to manage global indirect tax, end-to-end and across the ecosystem. Vertex solutions also provide you with the ability to support your current business needs, and the flexibility and scale needed to support future growth, whether that is geographic, channel or via M&A.



A Single, Robust Tax Solution

IT teams face considerable challenges in deploying and maintaining indirect tax solutions across different jurisdictions, while ensuring seamless integration with existing systems. Managing these complexities requires substantial resources and technical expertise, adding strain to already stretched teams and increasing the overall cost of ownership.

Some tax technology providers rely on multiple, disconnected applications to meet various tax needs, such as separate solutions for sales tax, use tax accruals, value-added tax and industry-specific tax calculations. The lack of meaningful integration between these solutions often leads to more complex implementation and maintenance, higher cost of ownership, gaps, and limited support for complex industry and transaction scenarios and workflows. It also leads to siloed systems managed by entirely separate support teams.

Ask yourself: Do you have a single tax engine that provides end-to-end compliance?

The Vertex Solution

Vertex offers the most complete and advanced portfolio of integrated solutions and services for Oracle, supporting end-to-end tax compliance including tax determination, exemption management, invoicing, e-invoicing, and compliance. More specifically, Vertex pre-built and validated compliance integrations and integrated returns for Oracle Cloud ERP translate calculation data into compliant reporting. This saves time and drives efficiency collecting the right data, improving data accuracy, and streamlining the compliance process.

Vertex is also the only tax tech vendor with solutions validated by Oracle to both integrate with and be hosted on Oracle Cloud Infrastructure (OCI). The Vertex integration is Oracle-certified, Oracle Cloud-embedded, and Oracle-aligned. Finally, we offer predictable pricing, flexible commercial terms and implementation models, along with a proven ability to support timeline, resourcing, and deployment needs—and are committed to minimizing disruption and cost while maintaining tax compliance. The bottom line—we offer a faster time to value.



Strong Implementation and Ongoing Customer Support

On the Oracle enterprise side, some tax technology providers lack focus on indirect tax—which means less depth and less rapid innovation and enhancement development to support indirect tax compliance.

On the Oracle mid-market side, some tax engine providers lack focus on that segment’s specific needs. In fact, they may claim you don’t need a lot of support at all — “it’s so simple you can self-implement.” Other vendors rely solely on third party providers to deliver integrations and implementations. That can mean trouble pre- and post-implementation if challenges arise.

Ask yourself: Do you feel like your current provider left you hanging once the ink dried?



The Vertex Solution

Vertex takes a pragmatic, experience-driven approach to implementation. We don’t over-promise—we ensure success through measured, well-planned deployments. Our implementation teams are well versed in migrating from other tax engines to Vertex. And our dedicated global service and support teams are Oracle-certified, providing responsive, knowledgeable service and support.

In fact, Vertex solutions can host and integrate directly with your Oracle solutions on Oracle Cloud, offering push-button, automated onboarding and setup. That means, implementation and configuration time is dramatically decreased, reducing what formerly took days or weeks down to minutes or seconds.

“The Vertex implementation team came in with great confidence. Even after working through some complex challenges, they still met the original aggressive timeline, and met the business capabilities they promised. So, it was just one less thing I had to worry about because Vertex partnered with Oracle and took care everything.”

*- Clifford Yeager, Application Portfolio Manager,
Black & Veatch*

Our guidance goes well beyond implementation:

- We are the first tax tech partner recognized as an Oracle Build Partner with expertise in Integrated in Oracle Cloud, as well as Powered by Oracle Cloud. We are also the only tax technology partner to be awarded Partner of the Year three times.
- Vertex Services and Development teams have an average resource tenure of 11 years at Vertex, and an average of 20 years of Oracle experience.
- We have also been recognized with [the IDC SaaS Customer Satisfaction Award](#) for Tax –leading in customer satisfaction for SaaS tax solutions.
- We are the only tax technology provider to earn HDI Support Center Certification, underscoring our commitment to superior customer service.
- Vertex has also been named as an IDC MarketScape leader in three categories: IDC MarketScape: Worldwide SaaS and Cloud-Enabled SaaS Sales and Use Tax Automation Software for Enterprise 2024 Vendor Assessment; IDC MarketScape: Worldwide Value-Added Tax Management Applications 2024 Vendor Assessment; IDC MarketScape: Worldwide SaaS and Cloud-Enabled SaaS Sales and Use Tax Automation Software for Small and Midmarket 2024 Vendor Assessment.
- We also offer a range of [support resources](#), including in-app AI-powered assistance, user groups, our annual Vertex Exchange conference and extensive training options.



Dedicated, Long-Term Staff

Instability and high turnover among staff can be a significant problem for many tax tech providers, leading to lack of continuity and lost expertise.

The Vertex Solution

Vertex solutions have been developed in conjunction with Oracle, by Oracle-certified SMEs who are Oracle veterans. The expertise of the team results in solutions that quickly provide enterprise-wide value.

In addition, Vertex solutions are supported pre- and post-implementation, by a dedicated global team of Oracle-certified consultants and support specialists. Vertex also prides itself on having a low employee turnover rate, with many customer-facing employees having more than a decade of experience.

“Fluctuating volumes, seasonal spikes, and business growth can all lead to unexpected cost increases, making it nearly impossible to forecast expenses accurately. A transparent pricing model ensures businesses can plan ahead without risk,” says Bernard.

More Transparent, Predictable Pricing

Some providers have adopted a per-transaction call pricing model, where costs increase unpredictably due to API calls and address cleansing transactions. This means every API call for a quote or when something is added to a cart (regardless of whether a purchase is completed) and address cleansing request contributes to the total transaction count, increasing overall costs. Often, the initial pricing for year one is set artificially low, creating the illusion of affordability, while actual usage in year two tends to be significantly higher.

The Vertex Solution

Vertex for Oracle offers a straightforward pricing model that:

- Adapts to changing business needs and scales to support growth as your business grows.
- Offers predictable, tier-based licensing

Unlike usage-based pricing, our model is designed to align with a long-term Total Cost of Ownership (TCO) vision, with an easy to use, integrated platform, along with improved data governance and automation.

Ability to Scale

Many tax technology providers struggle to support global operations, new business models, or evolving compliance requirements. Businesses may begin with a basic tax solution but realize as they scale that the current solution isn't equipped to handle increased complexity, such as international expansion, as well as the likelihood of outgrowing the original pricing model. And as companies grow in general, they may outgrow their tax engine, leading to inefficiencies, compliance risks and increased costs.

The Vertex Solution

Vertex is designed with scalability in mind— both the ability to handle spikes in transaction volumes that come with seasonality as well as business growth, market/channel expansion, and/or geographic growth. Whether it's organic or as the result of M&A, we can support your current setup and adapt as your needs evolve.

- Global expansion across multiple tax jurisdictions in 195+ countries.
- Complex tax scenarios across all tax types (sales and use tax, VAT, GST, plus industry-specific taxability for communications, leasing and more).
- Broadest integration support globally across Oracle applications, modules and platforms, including ERP, HCM and SCM.
- OCI deployments reported an average performance boost of 20% in AR processing and 14% in AP processing.

Conclusion—Why Consider Implementing or Switching Tax Compliance solutions?

Do you have a tax engine? Are you using a homegrown system? Is your current tax engine provider focused on your tax needs now and in the future? Does their solution easily integrate with your changing financial ecosystem? Do you have ongoing customer support from dedicated, long-term staff? Can you easily scale your tax process for growth? Do you understand your costs, and do you feel you receive value? If you're a mid-market company, is your current tax engine provider very clear about pricing now and in the future?

If any of these concerns resonate, it may be time to explore a tax engine that better aligns with your business objectives.



How Vertex Can Help You Make Your Move

Implementing or switching tax engines doesn't have to be daunting. With Vertex for Oracle, you gain a robust tax engine designed to seamlessly integrate with your financial systems—one you can scale alongside your business and evolve to meet your needs.

- We offer the most complete and advanced portfolio of integrations and services for Oracle applications and cloud.
- We support hundreds of global customers on Oracle Cloud Infrastructure, processing billions of transactions every month.
- We are the only tax tech vendor with solutions validated by Oracle to both integrate with and be hosted on Oracle Cloud Infrastructure.
- Only tax tech vendor with solutions deployed in-region on Oracle Cloud with data centers in the US and Frankfurt, Germany.

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- Clifford Yeager, Application Portfolio Manager, Black & Veatch

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The right tax engine should be an asset, not a liability. Vertex simplifies global tax for Oracle, with both companies sharing a common goal of helping companies of any size grow their business and reduce risks. We continue to innovate and provide customers with solutions and services that enable them to transform their tax and financial processes. Plus, we simplify compliance, accelerate invoicing, and address complex tax challenges—empowering Oracle users worldwide to scale confidently and compliantly. Finally, we offer an end-to-end platform, along with data governance, automated workflows, audit defense and archiving, end-to-end compliance, and AI.

Learn more about how with over 30 years of trusted partnership, [Vertex and Oracle](#) serve 2,000+ global customers.

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