



The Complete Indirect Tax Lifecycle for Oracle

How Vertex Delivers Accurate Calculation, Continuous Compliance, and Global e-Invoicing at Enterprise Scale



Executive Overview: Why Indirect Tax Is Now a Board-Level Issue

Indirect tax has entered a fundamentally new operating environment. What was once treated as a downstream compliance obligation—addressed after transactions were completed and reports were due—has become a continuous, real-time business function with direct implications for enterprise risk, financial accuracy, and operational resilience. Around the world, tax authorities are accelerating the shift away from periodic reporting toward continuous transaction controls, clearance-based e-invoicing, and near real-time digital audits. These mandates are reshaping not only what organizations must report, but how and when tax must be calculated, validated, reconciled, and retained.

At the same time, organizations are modernizing their core systems. Migrating to Oracle Cloud ERP is now central to broader digital transformation initiatives, exposing longstanding limitations in how indirect tax has traditionally been managed. Native ERP tax functionality, regional bolt-ons, and spreadsheet driven workarounds struggle to keep pace with global scale, regulatory change, and evolving business models. As a result, tax, finance, and IT teams are under increasing pressure to deliver accuracy, speed, and transparency—simultaneously.

In this environment, indirect tax can no longer operate reactively or in isolation. It must function as an always-on control surface—embedded directly into transaction flows, governed by trusted data, and adaptable by design. Tax data quality now affects close cycles, audit readiness, analytics, automation, and AI initiatives. What was once a back-office function has become a strategic enabler—and a board-level concern.

Oracle provides the enterprise platform to run modern business. Vertex delivers the tax intelligence that makes it compliant, resilient, and future-ready.



The Oracle Indirect Tax Challenge: Managing Complexity at Scale

For Oracle customers, the challenge is not simply managing risk—it is managing complexity at scale. Indirect tax requirements vary dramatically by jurisdiction, tax type, product category, industry, and transaction scenario. These regulatory demands are layered on top of increasingly sophisticated business operations spanning order-to-cash, procure-to-pay, intercompany transactions, omnichannel commerce, and cross-border supply chains.

Technology landscapes compound this complexity. Many organizations operate hybrid environments that include Oracle Cloud ERP alongside other Oracle applications (E-Business Suite, JD Edwards, and/or PeopleSoft), other e-commerce, CRM, and/or procurement solutions deployed on premise, in private cloud or on the edge. Each platform may handle tax logic differently, creating fragmentation across determination, invoicing, reporting, and compliance. As enforcement becomes more digital and immediate, inconsistencies across systems introduce risk that can no longer be corrected downstream.

Oracle's native tax capabilities provide an important baseline, but they are not designed to manage the full scope of global indirect tax complexity on their own. To fill the gaps, organizations often rely on regional tools, manual processes, or ERP customizations. While these approaches may address individual requirements, they introduce technical debt, brittle integrations, and inconsistent outcomes that slow transformation and increase audit exposure.

A key principle in modern ERP architecture is maintaining a “clean core.” This approach means keeping the ERP system free from customizations, especially those related to tax logic, so that upgrades, migrations, and regulatory changes can be implemented quickly and reliably. By externalizing tax determination and compliance processes to purpose-built solutions like Vertex, organizations preserve the integrity of their Oracle environment, reduce IT complexity, and ensure that their core ERP remains agile and future-ready. This clean core strategy not only simplifies ongoing maintenance but also enhances scalability and resilience across global operations.

The bottom line—without intelligent automation and a unified tax data foundation, tax teams remain reactive, finance teams absorb rework and leakage, and IT teams shoulder the burden of maintaining fragile customizations that inhibit agility.

“Achieving true compliance requires a holistic, end-to-end approach—one that goes beyond just implementing a tax engine. It demands seamless integration across the entire tax lifecycle, from determination and calculation to reporting, filing, and ongoing compliance management—including historical audit, and the ability to plan and test for the future. By addressing each step in the process, businesses can help ensure accuracy, reduce risk, create consistency, and maintain compliance in an ever-evolving regulatory landscape.”

— Michael Bernard, VP & Chief Tax Officer, Vertex

The Vertex and Oracle Partnership: Built, Validated, and Proven

For more than 30 years, Vertex and Oracle have worked together to help organizations manage indirect tax with confidence. This is Oracle's longest standing partnership with any tax technology provider, grounded in deep technical collaboration, joint development, and shared customer success. Vertex solutions are not simply integrated with Oracle—they are validated, codeveloped, and trusted by Oracle to support its own tax operations.

Vertex integrates across the full Oracle ecosystem, including Oracle Cloud ERP, E-Business Suite, JD Edwards, PeopleSoft, and NetSuite. This breadth allows organizations to standardize tax globally while supporting ERP modernization, cloud migration, and long-term architectural flexibility. In addition, the integration of Vertex solutions deliver native functionality and data in the ERP workflows.

“Vertex has been a trusted partner for more than 30 years, providing automated tax determination that has enabled joint customers to modernize their finance and accounting processes and grow their businesses more rapidly. Vertex’s tax solutions running on OCI have helped our joint global customers improve their ROI from the digital transformation of back-office operations.”

— David Hicks, GVP, Market and Business Development (OCI & AI), Oracle

This partnership delivers more than technical alignment—it delivers operational confidence. Oracle customers rely on Vertex to support high volume, high complexity environments where accuracy, stability, and performance are nonnegotiable.

Managing the Full Indirect Tax Lifecycle on Oracle

True global compliance requires more than just implementing a tax engine. It demands an end-to-end approach that spans the entire indirect tax lifecycle—from the moment a transaction is created through calculation, invoicing, reporting, filing, audit defense, and ongoing optimization. When these steps are managed in silos, inconsistencies emerge, reconciliation becomes manual, and audit risk increases.

- Manual workarounds persist across procurement, accounts receivable/accounts payable (AR/AP), and intercompany flows, creating inefficiencies and increasing the risk of errors.
- Disconnected regional compliance and e-invoicing tools further contribute to audit risk, as fragmented solutions make it harder to maintain consistent and accurate records.
- Organizations face an inability to support real-time reporting, reconciliation, and analytics at scale, limiting visibility and responsiveness to regulatory changes.
- There is a limited ability to operationalize tax data for advanced analytics or AI-driven insights, restricting opportunities for optimization and proactive tax management.



Vertex was built to manage the full indirect tax lifecycle as a unified process. By bringing tax determination, periodic and real-time tax compliance reporting, Compliance invoicing (Human-readable and e-invoicing), data intelligence, and services together on a single platform, Vertex enables Oracle customers to move beyond fragmented point solutions toward a cohesive compliance operating model. This continuity ensures that tax outcomes remain consistent across systems, jurisdictions, and reporting obligations—while providing the visibility and control required in today’s regulatory environment.

The implication is that without intelligent automation, tax teams remain reactive, addressing issues after the fact rather than driving strategic value, while finance and IT teams continue to shoulder the burdens of manual intervention and fragmented processes.

Tax Determination and Calculation: Accuracy at Transaction Speed

At the core of the Vertex platform is the Vertex O Series Tax Engine, a purpose-built solution designed to deliver accurate, consistent tax outcomes at transaction speed. Vertex O Series centralizes indirect tax determination across Oracle ERP environments and connected systems, ensuring that every transaction—regardless of source or geography—is calculated using the same continuously updated tax content.

With more than one billion tax rules spanning over 195 countries, Vertex O Series supports complex global scenarios including intercompany transactions, returns, drop shipments, and high-volume AR and AP processing. Flexible deployment options—across Cloud (Oracle Cloud Infrastructure (OCI)), hybrid, and on-premise environments—allow organizations to standardize tax globally while supporting ERP modernization, mergers and acquisitions, and regional expansion.

Additional capabilities such as address cleansing, latitude and longitude-based jurisdiction assignment, VAT ID validation, and exemption certificate management further enhance accuracy at the point of determination. By resolving issues upstream, organizations reduce downstream exceptions, improve audit readiness, and build trust in their tax data.



Tax Determination and Calculation: Accuracy Across Operations

The Vertex O Series and Oracle's integrated tax engines are recognized as primary solutions for indirect tax determination, delivering real-time calculation and compliance across the full spectrum of business operations—sales, procurement, inventory, and logistics. These engines are purpose-built for indirect tax, distinguishing themselves from general ledger modules or compliance add-ons by offering granular, continuously updated global tax content maintained outside the ERP. This structure ensures that every transaction, regardless of its origin or geography, is processed with consistent, accurate, and up-to-date tax rules.

Unlike alternative solutions, Vertex O Series is engineered specifically for indirect tax, not as a repurposed compliance bolt-on, and is proven to perform reliably at enterprise transaction volumes.

Oracle's own trust in Vertex for their internal tax operations underscores the platform's reliability and integration stability. Advanced capabilities such as address cleansing, latitude- and longitude-based jurisdiction assignment, VAT ID validation, and exemption certificate management further enhance the accuracy and granularity of tax determination at the transaction level. This clean, detailed tax data not only reduces downstream exceptions and audit risk but also forms the foundation for downstream analytics, agent-based automation, and continuous improvement in tax processes.

The value of this approach is clear: Tax teams gain confidence in calculation accuracy and audit readiness; Finance teams benefit from minimized tax leakage and reduced manual rework; and IT teams enjoy stable, Oracle-validated integration with ongoing support for modernization initiatives. As a result, organizations can move beyond reactive compliance to proactive tax management and operational excellence.

"We looked at the options and Vertex was the company that had the global coverage that we need at Unisys – had the business flows, had the workflows that we had. We saw in Vertex exactly what we were looking for."

*- Andrew Hamilton
Senior Indirect Tax Manager, Unisys*



Accelerating Oracle Cloud ERP Migrations with the Vertex Indirect Tax Accelerator

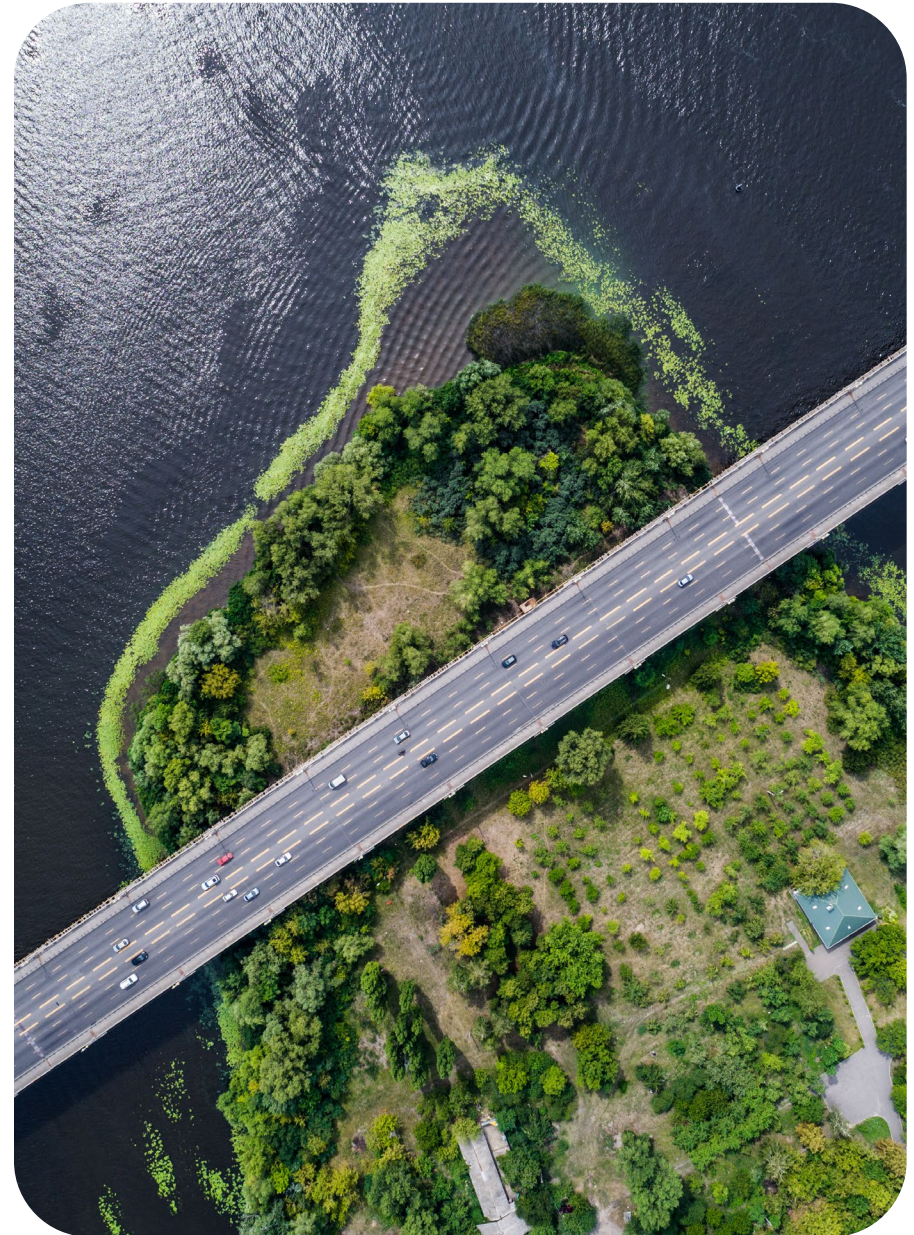
As organizations migrate to Oracle Cloud ERP, integration speed and stability become critical success factors. To address these challenges, Vertex offers the Vertex Accelerator for Oracle ERP. Building on the foundation of the Vertex O Series Tax Engine, the Accelerator automates tax integration and configuration, significantly reducing manual effort and shortening implementation timelines.

This direct integration replaces time consuming setup processes with near pushbutton configuration, intuitive mapping, and real-time testing. Organizations can go live faster, achieve ROI sooner, and adapt more easily to changes in business structure or regulatory requirements.

“This accelerator offers near pushbutton setup with the Vertex O Series tax engine... so businesses can go live faster.”

— Marc A. Duclos
Sr. Global Director, Strategic Partnerships, Vertex

Vertex has achieved a 100 percent success rate for Oracle Cloud ERP implementations—providing confidence for organizations navigating complex, multicounty cloud transformations.



Customer Proof Point: Accelerating Transformation Without Disruption

[Black & Veatch](#) is a global engineering and construction firm with over 100 locations. Facing the complexity of intercompany invoices and frequent tax updates, they migrated from Oracle E-Business Suite to Oracle Cloud ERP and partnered with Vertex to streamline and automate their indirect tax processes.

By implementing Vertex, the Black & Veatch team was able to enable a seamless, scalable tax solution tailored to their business. The results included increased accuracy in tax determination for complex intercompany transactions and also freed up the IT and tax team resources for strategic initiatives.

“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



Compliance, Reporting, and Filing: From Periodic to Continuous

Tax determination is only the beginning. Beyond translating the data for reporting, it's about having the ability to provide product compliance reporting, as well as the documentation required to support filing and remittance. Vertex VAT Compliance, reporting, and reconciliation tools deliver centralized VAT and GST reporting across dozens of countries, supporting unified compliance across jurisdictions rather than relying on region-specific add-ons. Manual reconciliations, disconnected tools, and regional workarounds increase audit risk and consume valuable resources; Vertex addresses these challenges by integrating reconciliation between ERP systems, the tax engine, and e-invoicing data, ensuring audit-ready reporting and standardized global data models. Integrated reconciliation reduces audit risk and dependency on manual controls and spreadsheets, while governed tax data enables faster anomaly detection and issue resolution.

Vertex extends the indirect tax lifecycle through integrated solutions for sales and use tax, VAT, and GST compliance. Centralized reporting, standardized data models, and built-in reconciliation ensure consistency between determination, invoicing, and filing. These solutions scale as mandates evolve, supporting both periodic and continuous compliance requirements. For organizations that prefer to outsource portions of compliance, Vertex also offers managed services that provide transparency and control without the administrative burden. This holistic approach reduces reliance on manual processes, enhances data governance, and supports audit readiness across global operations.

Differentiators:

- Unified compliance across jurisdictions—not region-specific bolt-ons
- Integrated reconciliation reduces audit risk and manual controls
- Scales as mandates shift from periodic to near real-time
- Governed tax data enables faster anomaly detection and issue resolution
- Reduces reliance on manual controls and spreadsheets



Global e-Invoicing and Real Time Reporting Without ERP Disruption

E-invoicing is no longer an AP or AR initiative—it is a regulatory mandate with direct tax authority oversight. Governments increasingly require invoice data to be transmitted, validated, and cleared in real time.

Vertex enables global e-invoicing and real-time reporting through a unified platform that supports clearance, real-time, and postaudit models across jurisdictions. By integrating e-invoicing directly into the broader tax lifecycle, Vertex ensures alignment between invoices, tax determination, and VAT reporting—without disrupting the ERP core.

Tax Data as a Strategic Asset: Analytics, Governance, and AI Readiness

Beyond compliance, high quality tax data is a strategic asset. Vertex delivers transaction level, governed tax data that can be operationalized for analytics, risk identification, and continuous improvement. Vertex Indirect Tax Intelligence transforms raw tax data into actionable insight—supporting audit readiness, configuration optimization, and proactive risk management.

Importantly, Vertex applies analytics and AI on top of trusted tax content—not generic ERP logic—ensuring insight and automation remain grounded in regulatory accuracy and empowers organizations with reliable intelligence and compliance that adapts as regulations evolve.



Oracle Cloud Infrastructure [OCI]

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. By deploying Vertex alongside Oracle ERP workloads on OCI, customers reduce system latency, improve transaction performance, and establish a scalable platform for future growth—while retaining control over where data resides and how it is governed.

- 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.

Oracle Marketplace

As Oracle customers modernize their ERP environments, ease of adoption and architectural alignment have become essential. Vertex supports this shift by offering its solutions through [Oracle Marketplace](#), giving organizations a straightforward, trusted way to discover, procure, and deploy enterprise grade tax technology within the Oracle ecosystem.

Oracle Marketplace provides a centralized destination for applications that are validated to work seamlessly with Oracle technologies. Procuring Vertex solutions through the Marketplace simplifies purchasing, accelerates internal approvals, and enables customers to consolidate spend—often using existing Oracle Universal Cloud Credits.



Role Based Value Summary

For Tax Leaders

Vertex brings confidence to tax operations running on Oracle Cloud ERP. Tax calculations are accurate, consistent, and aligned to current regulatory requirements—helping teams stay audit ready as transaction volumes and jurisdictions expand. By automating tax directly within Oracle business processes, tax leaders reduce manual intervention, limit downstream corrections, and maintain control without slowing the business.

For Finance Leaders

For finance leaders using Oracle Fusion, Vertex helps protect revenue and support a faster, more predictable close. Automated tax determination reduces leakage, improves reporting accuracy, and brings greater transparency to compliance costs across entities and regions. Controls are embedded within Oracle workflows, so compliance supports financial performance instead of adding friction to close and consolidation cycles. Our solutions also provide the ability to protect margins, reduce required cash reserves and increase flexibility to support business growth and expansion whether organic or via M&A.

For IT Leaders

Vertex is built to support Oracle's clean core strategy. Oracle validated integrations and certified connectors minimize customization and reduce long-term upgrade risk. Tax logic stays external to the ERP, protecting the integrity of Oracle Cloud ERP while simplifying patching and releases. Our solutions also provide improved tax data governance and the granularity of tax data supports downstream processes and data needs, as well as advanced use cases around AI and analytics.

With a scalable architecture aligned to Oracle Cloud Infrastructure (OCI), Vertex supports cloud growth today—and ongoing change tomorrow—without adding technical debt.

Why Oracle Customers Choose Vertex Over Native and Other Providers

Oracle customers choose Vertex because indirect tax demands more than a generic ERP feature or a regional add-on. Vertex is purpose built for indirect tax and deeply integrated into Oracle environments, with one of the longest standing tax technology partnerships in the Oracle ecosystem, including Oracle validated integrations and certified solutions available through the Oracle Marketplace. Unlike fragmented, modular tools that address only pieces of the tax lifecycle, Vertex delivers a single, unified platform for calculation, compliance, and e-invoicing—globally and at enterprise scale. That depth matters as tax moves from periodic reporting to real-time enforcement. Vertex is proven in complex, high volume Oracle environments and enhanced with AI capabilities grounded in trusted, governed tax data—so automation, analytics, and innovation are built on accuracy, not assumptions.

“Since our migration, the Vertex team has helped us simplify that process. We have fewer accrual errors to correct and that’s a big thing for us because when we do a correction, it means completing a journal entry and getting that posted. And also, potentially, manually recalculating the tax.”

*- Stefanie Albers
Assistant Director of Tax
Black & Veatch*





Conclusion: Building a Future Ready Tax Foundation on Oracle

Indirect tax is now continuous, real-time, and data-driven, requiring a modern approach to compliance and operational efficiency. Oracle provides the robust enterprise platform businesses need to keep pace with today's demands, while Vertex delivers the advanced tax intelligence that ensures compliance, resilience, and adaptability. This powerful combination enables organizations to transact, comply, and grow with confidence today and adapt to whatever comes tomorrow.

North America

Latin America

Europe

Asia Pacific



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