



Choosing the Right Tax Automation Solution for Oracle

An executive framework for evaluating tax automation—and maximizing your Oracle investment

Table of Contents

- 3** [Introduction: Make Tax Automation a Strategic Extension of Oracle ERP](#)
- 4** [Chapter 1: A New Era for Tax: Strategic Value and Measurable ROI](#)
- 6** [Chapter 2: Integration Ease and the Oracle Partnership](#)
- 7** [Chapter 3: Deployment Flexibility for Your Modernization Journey](#)
- 8** [Chapter 4: Data Quality, Automation, and the End-to-End Tax Lifecycle](#)
- 9** [Chapter 5: Implementation, Service, and Audit Defense](#)
- 10** [Chapter 6: Scalability and Total Cost of Ownership](#)
- 11** [Conclusion: Why Vertex Is the High ROI Choice for Oracle Customers](#)



Introduction: Make tax automation a strategic extension of Oracle ERP

Enterprise change rarely happens one initiative at a time. Oracle Cloud ERP migrations, global expansion, M&A, and new regulatory requirements often move in parallel. The question is how to ensure those investments translate into measurable business value—and indirect tax sits at the center of that challenge.

When tax automation is evaluated as an afterthought to ERP strategy, organizations can end up with fragmented architectures, inconsistent data, and limited flexibility—right when the business needs more speed, insight, and scale. In Oracle-based enterprises, that disconnect can dilute the outcomes ERP modernization is meant to deliver.

Leading organizations take a different approach: they treat end-to-end indirect tax automation as a strategic extension of their Oracle investment. When tax determination, compliance, reporting, and data governance are embedded into Oracle transaction flows, tax becomes a lever for growth, margin protection, and transformation—not just risk mitigation.

That shift calls for a higher bar in vendor evaluation. Beyond features and regional coverage, leaders should ask:

- Does the platform deliver consistent, accurate tax data at the point of transaction—and preserve it end-to-end?
- Is tax automation natively aligned with Oracle Cloud ERP, Oracle Cloud Infrastructure, and clean core principles, or dependent on custom integrations and workarounds?
- Can the solution scale with new markets, business models, and acquisitions without reimplementing?
- Does the vendor bring deep Oracle expertise, proven execution, and long-term partnership—or simply technical compatibility?

The reality is that not all tax platforms are built for this level of enterprise integration. Solutions assembled from disconnected components, retrofitted for cloud environments, or reliant on third-party infrastructure often introduce hidden costs, data integrity risks, and long-term constraints. These issues may not surface during initial deployment, but they become material as regulatory demands increase and the business evolves.

This whitepaper provides a framework for evaluating indirect tax automation through an enterprise and executive lens. It outlines what “end-to-end” truly means in Oracle environments, the capabilities that drive long-term ROI, and the criteria leaders should use to assess both the platform and the partner behind it. Whether the goal is to improve compliance efficiency, unlock better financial insight, or extend the value of Oracle Cloud investments, the decisions made here will shape performance for years to come.

For organizations committed to maximizing their Oracle strategy, the message is clear: tax automation must be engineered for scale, governed by data, and aligned to the platform—not bolted on after the fact.



Chapter 1: A New Era for Tax: Strategic Value and Measurable ROI

Indirect tax has entered a new era. Once viewed primarily as a compliance obligation, it is now increasingly recognized as a strategic contributor to enterprise financial performance. Today's tax and finance leaders are expected not only to manage regulatory risk with precision, but also to support margin protection, operational efficiency, and business growth—while operating within increasingly complex Oracle-based environments.

This shift is driven by broader enterprise change. Oracle Cloud ERP migrations, global expansion, new digital business models, and heightened regulatory scrutiny are placing greater demands on tax accuracy, speed, and transparency. In this context, the limitations of manual and legacy tax approaches are becoming more pronounced—and more costly.

The Hidden Costs of Manual and Legacy Tax Approaches

Traditional indirect tax processes, often reliant on spreadsheets, fragmented tools, and manual validation, introduce structural risks that extend beyond compliance:

- Higher audit exposure and penalties**
 Disconnected documentation and inconsistent data increase audit frequency, duration, and cost—directly impacting financial results.
- Capital inefficiency**
 Uncertainty around tax accuracy forces organizations to hold excess reserves, tying up cash that could otherwise support growth, investment, or acquisitions.
- Operational fragility**
 Dependence on manual processes and institutional knowledge creates key person risk, slows response to change, and limits scalability.
- Business and brand impact**
 Errors in tax calculation, invoicing, or reporting introduce customer friction, delay transactions, and erode trust—particularly in high-volume, cross-border environments.

As these risks compound, tax becomes a constraint on transformation rather than a contributor to it.

Tax Data Governance as the Foundation for Downstream Value

At the center of these challenges is tax data governance. Indirect tax outcomes are only as reliable as the data that fuels them, yet in many organizations, tax data is incomplete, inconsistently classified, or reconciled only after transactions are processed. This weakens not only compliance, but every downstream process that depends on tax data.

When tax determination is embedded into Oracle transaction flows and governed at the point of transaction, organizations establish a single, trusted source of tax data.

This enables:

- More accurate and timely reporting and reconciliation
- Fewer audit adjustments and penalty assessments
- Improved forecasting of liabilities and cash requirements
- Cleaner handoffs into filing, remittance, analytics, and audit defense

Strong tax data governance also amplifies the value of enterprise initiatives such as shared services, advanced analytics, and AI. These capabilities depend on granular, consistent, and auditable data—something manual and fragmented tax processes struggle to deliver. By contrast, automation creates continuity across the entire tax lifecycle, turning tax data into a reusable enterprise asset rather than a compliance byproduct.



Automation as a Driver of ROI and Enterprise Impact

An automation-driven approach to indirect tax fundamentally changes the economics of compliance. By unifying tax determination, compliance, and reporting within core Oracle workflows, organizations consistently achieve:

- Significant reductions in manual effort and rework
- Lower audit and dispute costs through improved controls and transparency
- More accurate reserve management, freeing capital for higher-value use

Just as importantly, improved tax accuracy at the point of transaction helps protect margins—reducing leakage, pricing errors, and downstream corrections that erode profitability. For CFOs, this translates into better cash flow visibility, fewer surprises, and greater financial agility.

Shifting Tax from Execution to Value Creation

When routine tax activities are automated and data is governed end-to-end, tax professionals can redirect effort away from remediation and toward analytics, planning, and advisory work. This enables tax and finance teams to engage earlier and more strategically in initiatives such as market expansion, product launches, pricing strategy, and M&A integration.

In Oracle environments, these benefits are amplified when tax automation is architected as a native extension of the ERP platform, aligned with cleancore principles, Oracle Cloud Infrastructure, and quarterly update cycles. This alignment reduces IT burden and long-term cost while ensuring tax capabilities scale alongside the business.

In this new model, indirect tax is no longer measured solely by risk avoidance. It becomes a data-driven, enterprise capability—delivering measurable ROI, improving downstream processes, and supporting growth and transformation with confidence.

How End-to-End Tax Data Creates Enterprise Value

From Transaction to Strategic Insight

- 1. Accurate Data at the Point of Transaction**
 Tax is calculated consistently and correctly within Oracle business processes—across procurement, order-to-cash, inventory, logistics, and intercompany activity.
- 2. Governed Tax Data Foundation**
 A single, shared data layer standardizes tax classification, jurisdiction logic, and transaction details—creating trusted, audit-ready tax data.
- 3. Automated Downstream Compliance**
 Clean data flows seamlessly into reporting, reconciliation, filing, remittance, and compliant invoicing—reducing manual effort and rework.
- 4. Reduced Risk and Financial Exposure**
 Fewer errors lead to fewer audits, lower penalties, and more accurate reserve requirements—freeing capital and improving cash flow efficiency.
- 5. Enterprise-Wide Business Impact**
 High quality tax data supports faster close, better forecasting, margin protection, advanced analytics, and AI-driven insights—enabling confident growth and transformation.



Chapter 2: Integration Ease and the Oracle Partnership

In Oracle environments, integration is not a technical detail—it is a strategic determinant of success. The effectiveness of any indirect tax automation initiative depends on how seamlessly tax capabilities are embedded into Oracle business processes and how well they align with Oracle's platform architecture over time.

For tax, finance, and IT leaders, the question is not simply whether a tax solution “connects” to Oracle, but whether it is engineered to operate as a natural extension of the Oracle ecosystem. Integration quality directly influences tax accuracy, audit defensibility, close efficiency, data governance, and the organization's ability to scale without friction.

Why Purpose-Built Oracle Integration Matters

In complex Oracle environments, indirect tax touches nearly every core process—accounts payable and receivable, procurement, order-to-cash, inventory, logistics, and inter-company transactions. When tax automation is purpose-built for Oracle, data flows cleanly and consistently across these modules, reducing the need for manual intervention or downstream correction.

Well-aligned integration delivers several enterprise benefits:

- Improved data integrity and accuracy through consistent transaction handling across Oracle modules
- Reduced reconciliation effort and exception handling, accelerating period close and reporting
- Real time visibility into tax calculations, configuration changes, and jurisdictional updates—supporting faster response to audit and regulatory inquiries

By contrast, loosely coupled integrations or adapter-based approaches often introduce latency, duplicate data models, and manual checkpoints that undermine confidence in tax outcomes as transaction volumes and complexity increase.

Integration as a Driver of Implementation Speed and Predictability

Integration challenges are among the most common sources of ERP project delays, cost overruns, and scope expansion. Solutions that are validated and co-engineered to work within Oracle environments typically reduce both initial implementation effort and long-term operational overhead.

From an executive perspective, this translates into:

- Shorter deployment timelines and faster time-to-value
- Lower dependence on custom development and specialized technical resources
- Greater predictability in cost, resourcing, and outcomes

When integration is standardized and aligned to Oracle's architecture, tax automation becomes easier to deploy across regions, business units, and newly acquired entities—without repeating foundational work.

Sustaining Value Through Oracle Change Cycles

Oracle environments are not static. Quarterly updates, regulatory change, evolving business models, and platform innovation place continuous demands on integrated systems. Tax solutions that align natively with Oracle's update cadence and clean core principles are better positioned to absorb change without disruption.

Native integration reduces the frequency and cost of remediation following ERP updates, minimizes regression testing effort, and lowers the risk of configuration drift over time. For IT teams, this results in a sustainable architecture with fewer custom interfaces to maintain and a lower long-term total cost of ownership.

Integration, Data Governance, and Audit Readiness

Effective integration also underpins tax data governance. When tax calculation and transaction data are captured consistently within Oracle workflows and preserved in a shared data layer, organizations gain a reliable audit trail that spans the full tax lifecycle.

This level of transparency supports:

- Faster, more efficient audit response
- Reduced reliance on key individuals and “tribal knowledge”
- Lower indirect costs associated with regulatory inquiries and remediation

More importantly, it enables tax, finance, and IT teams to operate from a single source of truth—improving trust in data and reducing friction across functions.

Integration as a Strategic Enabler

For Oracle customers, integration ease is not simply about minimizing effort—it is about maximizing the long-term value of their Oracle investment. When tax automation is deeply aligned with Oracle applications and infrastructure, it supports scalability, accelerates transformation initiatives, and ensures that tax does not become a bottleneck to growth.

In this context, the strength of the Oracle partnership behind a tax platform matters. Deep collaboration, validation, and co-development with Oracle help ensure that tax capabilities evolve alongside the ERP platform—rather than lag behind it.

The result is an integration model that is resilient, scalable, and strategically aligned—enabling tax to operate with confidence today while remaining adaptable to the demands of tomorrow.

Chapter 3: Deployment Flexibility Across the Oracle Modernization Journey

Enterprise transformation is not a single event—it is a continuous journey. As organizations modernize on Oracle, they must be prepared to adapt to changing business models, regulatory requirements, and operating structures. Cloud ERP migrations, acquisitions, geographic expansion, and evolving compliance mandates all place new demands on tax architecture. In this environment, deployment flexibility becomes a strategic requirement, not a technical preference.

For tax, finance, and IT leaders, the goal is to ensure that tax automation supports modernization initiatives without introducing disruption, rework, or unnecessary cost. A rigid deployment model may meet current needs, but it often becomes a constraint as the business evolves.

Why Deployment Flexibility Matters

A flexible deployment approach allows organizations to align tax automation with their broader Oracle strategy—whether operating fully in the cloud, in hybrid environments, or through phased migrations. This flexibility enables organizations to modernize at their own pace while maintaining consistent tax controls and compliance.

From an enterprise perspective, deployment flexibility delivers several advantages:

- Reduced reimplementations and migration costs by avoiding “rip-and-replace” approaches as systems and operating models change
- Business continuity during transformation, ensuring tax operations remain stable through ERP migrations, acquisitions, and organizational restructuring
- Centralized tax operations across multiple Oracle instances or business units, reducing redundancy and improving consistency

Rather than forcing tax processes to conform to infrastructure constraints, flexible deployment allows tax automation to adapt as the enterprise evolves.

Supporting Growth, M&A, and Global Expansion

Growth initiatives often expose the limitations of inflexible tax architectures. New entities, markets, or business models introduce additional complexity that legacy or narrowly deployed solutions struggle to absorb. Flexible deployment enables organizations to extend tax controls quickly—without rebuilding integrations or duplicating systems.

This capability is particularly important in M&A scenarios, where speed and consistency are critical. The ability to onboard acquired entities, integrate new Oracle environments, and apply standardized tax logic reduces risk while accelerating value realization.

Aligning Deployment with Oracle Architecture and IT Strategy

Deployment flexibility must also align with Oracle’s platform principles. Tax solutions that support cloud-native deployment, hybrid coexistence, and Oracle Cloud Infrastructure (OCI) allow IT teams to maintain architectural consistency while reducing long-term maintenance overhead.

When tax automation is deployed in a way that complements Oracle’s clean core strategy and update cadence, organizations benefit from:

- Lower ongoing IT support and remediation effort
- Improved resilience to Oracle quarterly releases and platform enhancements
- Greater predictability in cost, performance, and scalability

This alignment ensures that tax automation does not become a barrier to modernization—but instead evolves alongside the Oracle ecosystem.

Turning Flexibility into Financial Impact

Beyond operational advantages, deployment flexibility delivers measurable financial value. By avoiding redundant systems, accelerating onboarding, and reducing reimplementations, organizations lower total cost of ownership and free resources for higher-value initiatives. Over time, these efficiencies compound—supporting faster growth, improved cash utilization, and more disciplined technology investment.

In this context, deployment flexibility is not simply about where a solution runs. It is about preserving choice, reducing friction, and protecting long-term value as the organization transforms.

For Oracle customers, tax automation platforms that combine deployment flexibility with deep Oracle alignment provide a durable foundation—one that supports today’s requirements while remaining adaptable to what comes next.

Chapter 4: Data Quality, Automation, and the End-to-End Tax Lifecycle

In modern Oracle environments, the effectiveness of indirect tax compliance is determined less by individual features and more by the quality, consistency, and governance of tax data across the enterprise. As transaction volumes grow and business models become more complex, fragmented tax data and manual processes introduce risk, inefficiency, and hidden cost—regardless of how many compliance tools are in place.

High-quality tax data is the foundation for accurate compliance, defensible audit outcomes, and measurable business value. Without it, even well-intentioned automation initiatives struggle to deliver sustainable results.

Why Data Quality Is Central to the Modern Tax Function

Indirect tax touches nearly every transaction flowing through Oracle applications. Accuracy at the point of transaction—within procurement, order-to-cash, inventory, logistics, and intercompany processes—determines the reliability of everything that follows.

When tax determination is embedded directly into Oracle workflows and supported by automated validation, organizations benefit from:

- Transaction-level accuracy that improves close quality and audit readiness
- Consistent tax classification and jurisdiction logic across regions and entities
- Elimination of data fragmentation, reducing reconciliation effort and downstream correction

By contrast, environments that rely on disconnected systems or post-transaction adjustments often struggle to establish a single version of the truth—forcing tax and finance teams into manual reconciliation cycles that slow close and weaken confidence in reported results.

Automation Across the Full Tax Lifecycle

End-to-end automation extends beyond calculation alone. A unified approach connects research, determination, exemption and certificate management, reporting, filing, and audit support into a single lifecycle—operating on a shared data foundation.

This lifecycle-based model delivers several advantages:

- Cleaner handoffs between determination, reporting, and compliance processes
- Centralized, audit-ready documentation that reduces response time and effort
- Fewer errors and exceptions that would otherwise cascade into penalties, disputes, or rework

When automation replaces manual intervention across the lifecycle, tax teams gain consistency, control, and scalability—without increasing operational burden.

Financial and Operational Impact of Governed Tax Data

The financial implications of improved tax data quality are significant. Organizations that govern tax data end-to-end consistently experience:

- Lower error rates and reduced manual remediation
- Fewer audit adjustments and defense costs due to stronger documentation and transparency
- Improved reserve accuracy, allowing excess capital to be released back into the business

More accurate tax determination at the point of transaction also helps protect margins, reducing leakage caused by incorrect rates, misapplied exemptions, or delayed corrections. For CFOs, this translates into better cash flow visibility, fewer surprises, and greater confidence in financial planning.

Enabling Higher-Value Work and Enterprise Insight

When data quality and automation are addressed holistically, tax professionals can shift focus away from correction and compliance firefighting toward analytics, planning, and advisory work. Governed, granular tax data becomes a reusable enterprise asset—supporting forecasting, scenario analysis, and emerging analytics and AI initiatives.

In Oracle environments, these benefits are maximized when tax automation operates as a native extension of the ERP platform, preserving data integrity across modules and lifecycle stages. This alignment ensures that tax data supports not only compliance requirements, but also broader enterprise goals tied to growth, transformation, and operational excellence.

Ultimately, the value of automation lies not in replacing manual tasks, but in creating trusted data that flows end-to-end. When indirect tax data is accurate, governed, and embedded within Oracle processes, organizations gain stronger compliance outcomes—and a foundation for sustained business value.

Chapter 5: Implementation, Ongoing Service, and Audit Defense

The long-term success of any tax automation initiative depends not only on technology, but on how it is implemented, supported, and sustained over time. Even the most capable platform will fall short of expected ROI if it is poorly deployed, inconsistently configured, or unsupported as the business and regulatory environment evolve.

For Oracle-based enterprises, implementation and service should be viewed as strategic enablers—critical to reducing risk early, accelerating time-to-value, and ensuring that tax automation continues to perform as the organization grows.

Implementation as a Risk-Reduction and Value-Acceleration Lever

Effective implementation establishes the foundation for accurate tax outcomes, stable operations, and confidence across tax, finance, and IT. In complex Oracle environments—particularly those involving multiple entities, jurisdictions, and transaction types—implementation expertise matters as much as software capability.

An expert-guided approach to implementation delivers several advantages:

- Faster time-to-value, with tax automation operational earlier in the transformation cycle
- Configuration for real-world complexity, including cross-border transactions, intercompany flows, and industry-specific requirements
- Reduced reliance on custom development, lowering IT dependency and long-term maintenance risk

When tax solutions are configured using standardized, Oracle-aligned tools and proven implementation methodologies, organizations reduce deployment friction and avoid technical debt that can limit scalability later.

Sustaining Value Through Ongoing Service and Support

Tax compliance is not static. Regulatory change, Oracle ERP updates, organizational restructuring, and evolving business models require continuous attention. Ongoing service and support play a critical role in maintaining accuracy, performance, and confidence in tax operations.

Strong service models provide:

- Proactive updates to tax content and configurations
- Support aligned to Oracle's quarterly update cadence
- Faster resolution of issues without over reliance on internal "key experts"

This continuity reduces operational disruption and allows tax and finance teams to focus on oversight and strategy rather than troubleshooting.

Audit Defense as a Strategic Capability

Automation fundamentally changes the nature of audit defense. Rather than reacting to audit requests with manual data gathering and reconciliation, organizations with centralized, governed tax data can respond quickly and confidently.

When transaction data, tax determinations, exemptions, and documentation are captured consistently within Oracle workflows and preserved end-to-end, organizations benefit from:

- Lower audit and penalty exposure due to stronger documentation and transparency
- Reduced effort and cost to compile, validate, and submit audit materials
- Improved confidence across tax, finance, and leadership during regulatory reviews

Over time, this shift reduces not only direct audit costs, but also the indirect burden placed on teams during audit cycles.

From Deployment to Durable Value

The combined impact of expert implementation, ongoing service, and strong audit defense is durability. Tax automation is not treated as a one-time project, but as a long-term enterprise capability that continues to deliver value as the organization evolves.

For Oracle customers, this durability is maximized when implementation and service teams bring deep Oracle expertise and operate in close alignment with the ERP platform. The result is a tax environment that is easier to maintain, more resilient to change, and better positioned to support growth, transformation, and regulatory complexity over time.

In this model, implementation and service are not overhead—they are the mechanisms that convert tax automation into sustained ROI, reduced risk, and strategic confidence.

Example: Nite Ize achieved rapid implementation and expanded compliance capabilities on time and within budget, enhancing operational readiness and audit defense.

Chapter 6: Scalability and Total Cost of Ownership—Why Vertex Delivers Sustained ROI

As enterprises scale, indirect tax must expand with the business—without driving disproportionate cost, complexity, or risk. For tax, finance, and IT leaders, scalability is not simply about higher transaction volumes; it is about maintaining predictable economics, strong controls, and measurable ROI as regulatory, operational, and organizational complexity increases.

Vertex is purpose-built to meet this challenge in Oracle environments. Its architecture, pricing model, and operating approach are designed to support enterprise growth while preserving financial clarity and long-term value.

Scalable Tax Operations Designed for Oracle Enterprises

Vertex enables organizations to standardize and scale indirect tax operations across regions, entities, and Oracle instances using a single, global platform. New entities, jurisdictions, and transaction types can be onboarded quickly without reimplementing or parallel systems—reducing redundancy and accelerating time to value.

Key scalability advantages include:

- Rapid onboarding of new Oracle Cloud ERP and hybrid environments using shared configuration and tax logic
- Centralized tax operations that reduce duplication across business units and geographies
- Subscription and tier-based pricing models that align cost with enterprise value—avoiding transaction-based fees that penalize growth

This model allows tax automation to scale economically as the business grows, rather than introducing escalating marginal cost.

Total Cost of Ownership: Where Vertex Consistently Differentiates

While license costs are visible, the true cost of tax compliance is driven by labor, audit exposure, excess reserves, rework, and IT maintenance. Vertex is designed to reduce these hidden costs across the full tax lifecycle.

Oracle customers using Vertex consistently realize:

- Improved reserve accuracy, enabling the release of approximately 10–25% of indirect tax reserves back into working capital—often translating to \$1–2.5 million annually for large enterprises
- Substantial reductions in audit penalties and defense costs, driven by centralized, audit-ready tax data and stronger controls
- Material labor savings, as automation eliminates manual calculation, reconciliation, certificate management, and exception handling

Because Vertex operates as a single, end-to-end platform—rather than a collection of point solutions—these benefits compound over time. As transaction volumes increase, the cost of compliance grows far more slowly than the business itself, improving operational leverage and margin protection.

Predictable Economics in a Changing Business Environment

Vertex's scalability is matched by cost predictability. Regulatory expansion, M&A activity, and new business models do not require new systems or repeated integrations. Instead, existing capabilities can be extended incrementally, preserving data governance and architectural consistency.

For executives, this predictability simplifies budgeting, strengthens the automation business case, and reduces the risk of future technology churn. Tax becomes a controllable, forecastable function—rather than an escalating cost center.

Proven ROI Across Complex Oracle Environments

Across global Oracle deployments, Vertex customers consistently report:

- Up to 90% reduction in manual tax processing and error correction effort
- Up to 90% reduction in audit penalty and defense expenses
- Release of 10–25% of reserve capital, improving cash utilization and financial flexibility

These outcomes reflect more than automation efficiency—they demonstrate the impact of accurate tax determination at the point of transaction, governed data across the lifecycle, and deep alignment with Oracle applications and infrastructure.





Conclusion: Why Vertex Is the High ROI Choice for Oracle Customers

For tax, finance, and IT leaders, the mandate is no longer simply to manage indirect tax risk—it is to turn tax into a measurable driver of enterprise value. In Oracle-based organizations, the choice of tax automation platform directly affects cash flow, margin protection, operational efficiency, and the ability to scale with confidence.

Vertex stands apart by delivering:

- End-to-end indirect tax automation embedded directly within Oracle processes
- Strong tax data governance that supports compliance, reporting, analytics, and AI initiatives
- Scalable architecture with predictable total cost of ownership
- Proven implementation, global services, and audit defense capabilities aligned to Oracle environments

By reducing manual effort, minimizing audit exposure, optimizing reserves, and protecting margins, Vertex enables tax and finance teams to move beyond execution and actively support growth, transformation, and strategic decision-making.

For organizations looking to maximize the value of Oracle, the takeaway is straightforward: choose a tax platform built to integrate deeply, scale confidently, and deliver durable, defensible ROI.

Learn more about how Vertex supports Oracle-based tax automation.

For more information, visit VertexInc.com or follow on [X](#) and [LinkedIn](#).

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