



Managing the Full Indirect Tax Lifecycle in SAP

How SAP users extend automation, control, and audit readiness without replacing the tax engine they already trust



SAP environments don't stand still and neither do the demands placed on tax. As SAP programs advance—through S/4HANA, cloud adoption, and ongoing platform updates—tax becomes more deeply embedded in your day-to-day operations, shaping transactions, reporting, and compliance in new ways.

You already trust **Vertex O Series** for tax determination inside SAP; you've solved the hardest part. But for many organizations, the most persistent challenges arise after calculation, across exceptions, reconciliation, audit readiness, and ongoing change. Optimizing these operational layers can help your team scale, stay resilient, and deliver more value from the SAP tax automation you've already invested in.

“Tax determination is foundational, but real value comes from the workflows around it. This isn't about replacing your tax engine—it's about extending control, resilience, and audit readiness across the Vertex + SAP foundation you trust.”

*- Brian Wilchusky,
Head of Global SAP
Partnerships, Vertex*



Looking at tax through an end-to-end lifecycle lens helps clarify where challenges tend to emerge and where optimization can make the biggest difference over time.

Where Tax Challenges Show Up Across the SAP Tax Lifecycle

Tax challenges in SAP don't appear all at once. They tend to surface at different points. This framework shows where friction typically emerges, why issues surface later, and how they impact the business as SAP environments grow and change.

	Determine & Calculate	Report, Comply, Pay & File	Retain, Defend & Plan
Where you typically are	You're using Vertex O Series for consistent tax determination in SAP, but coverage is limited to core processes and scenarios.	You have determination covered, but SAP now spans more processes, regions, and regulatory requirements.	You have determination and compliance covered, but staying ahead of change is the challenge.
What starts to break down	<ul style="list-style-type: none"> • Complex fulfillment scenarios (like drop shipments) create uncertainty. • Manual tax-only adjustments increase over time. • Non-SAP or card-based spend is handled outside governed processes. • Regression risk grows as SAP upgrades and integrations expand. 	<ul style="list-style-type: none"> • Filing and reporting require manual reconciliation and review. • E-invoicing and CTC mandates introduce new operational pressure. • Vendor-charged tax doesn't align cleanly with expected outcomes. • VAT data isn't consistently structured for audit or reporting. 	<ul style="list-style-type: none"> • Limited early visibility into tax anomalies or emerging risk. • Root-cause analysis is slow and resource-intensive. • Explaining historical outcomes during audits is difficult. • SAP upgrades and regulatory changes feel reactive instead of planned.
Why issues surface late	<ul style="list-style-type: none"> • Testing is manual or inconsistent before going live. • Safeguards don't scale as channels and buying models grow. 	<ul style="list-style-type: none"> • Exceptions aren't identified until close or audit prep. • Compliance data is fragmented across systems and formats. 	<ul style="list-style-type: none"> • Monitoring is periodic instead of continuous. • Change validation happens after issues hit the ledger.
How this impacts the business	<ul style="list-style-type: none"> • Increased rework, credits, and tax-only corrections. • Higher reliance on manual intervention to maintain accuracy. 	<ul style="list-style-type: none"> • Longer close cycles and higher compliance effort. • Increased audit exposure and regulatory risk. 	<ul style="list-style-type: none"> • Slower audit response and reduced confidence in change. • Hesitation around SAP modernization and transformation.

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Determine and Calculate

There are over 20,000 taxing jurisdictions worldwide, each with its own liability and supply rules, cross-border transfer interpretation, and product and exemption rates and rules that can change at any time. Staying on top of the latest tax regulations and standards can feel overwhelming. We understand how daunting and time-consuming this can be, especially if you're managing changes manually or differently between systems; it's not only inefficient but also prone to errors.

Determine

Calculate

Report

Comply

Pay

File

Retain

Defend

Plan



Integrating SAP with Vertex O Series

Vertex SIC Cloud Connector, Tax Service API for SAP, SAP SIC Connector (Legacy)

How tax connects to SAP becomes increasingly important to your upgrade stability, maintenance effort, and long-term tax reliability. We offer multiple connectors to support different SAP architectures and modernization paths, giving you a stable foundation for tax data exchange between SAP and Vertex O Series.

SAP Connector Options at-a-Glance

Vertex SAP SIC-Cloud Connector	Vertex Tax Service API for SAP	Vertex SAP SIC Connector (Legacy)
<p>Recommended for modern SAP environments</p> <ul style="list-style-type: none">• Cloud-based connector deployed on SAP BTP (customer hosted or Vertex-hosted multi-tenant).• Aligns with SAP Clean Core principles.• Eliminates on-premise connector maintenance.• Supports U.S. and Canada sales and use tax scenarios.• Designed for easier upgrades and long-term SAP roadmap alignment.	<p>Flexible option for VAT centric scenarios</p> <ul style="list-style-type: none">• Modern, REST-based integration to O Series.• Commonly used for VAT determination scenarios (depending on architecture and requirements).• Supports global tax content with regular content updates.• Can be used alongside modern SAP architectures.	<p>Supported, but not recommended for new projects</p> <ul style="list-style-type: none">• On-premise connector requiring local installation and maintenance.• Historically used for sales and use tax integrations.• Increases upgrade and maintenance effort over time.
<p>Best for: SAP users modernizing to S/4HANA, adopting cloud strategies, or looking to reduce technical debt.</p>	<p>Best for: Customers with VAT focused requirements or service based integration preferences.</p>	<p>Best for: Existing environments where modernization has not yet begun.</p>

How These Connectors Fit with Accelerator+

Many Vertex customers implement Accelerator+ with connectors to:

- Reduce reliance on custom ABAP code
- Standardize tax configuration
- Support Clean Core-aligned SAP architectures
- Minimize disruption during SAP upgrades and migrations

See further details about Accelerator+ on the next page.



Simplified Tax Management Tool for SAP ERP

Vertex Accelerator+ for SAP ERP

As SAP environments evolve, tax setup can quickly become difficult for your team to manage. Over time, custom code, inconsistent configuration, and one-off fixes make it harder for you to understand how tax is applied, test changes with confidence, and move forward with SAP initiatives. Even when tax calculation is accurate today, this lack of consistency often creates risk during upgrades, audits, and system changes.

[Vertex Accelerator+ for SAP ERP](#) helps bring order and control to how tax is configured and maintained inside SAP so you can reduce reliance on custom ABAP, standardize configuration, and maintain consistency across ECC, S/4HANA, and hybrid environments.



Before Accelerator+	With Accelerator+
Tax is calculated correctly, but managing tax setup feels manual and fragmented.	Tax setup is centralized and easier to manage through a single, SAP-embedded workspace.
Tax configuration lives in custom code, user exits, and one-off fixes added over time.	Tax configuration is standardized and maintained in a consistent, supported way.
Different SAP systems or landscapes handle tax slightly differently.	The same tax setup is applied consistently across ECC, S/4HANA, and hybrid environments.
Making tax-related changes usually requires IT support and coordination.	Tax and Finance teams have more visibility and control, with less reliance on IT.
Testing tax changes is time-consuming and hard to repeat with confidence.	Standardized setup makes testing changes easier and more repeatable.
During audits or issue reviews, it's difficult to explain how a tax result was produced.	Clear traceability between configuration and outcomes supports audit readiness.
SAP upgrades and transports introduce uncertainty and last-minute fixes for tax.	Tax remains stable as SAP changes, reducing rework and operational disruption.



Tax Determination Governed Inside SAP

Vertex PLUS Tools: Drop Shipment, flexRFC, flexTAX, FLUX Builder, and TestSuite

Accurate tax determination is essential, but for many SAP users, day to day tax challenges come from the calculation itself. They come from manual corrections, inconsistent data, exception driven rework, and the effort required to keep tax stable as SAP changes.

[Vertex PLUS Tools for SAP ERP](#) are a suite of SAP-embedded assistants that help you diagnose issues early, correct errors efficiently, and prevent repeat problems, without relying on custom ABAP or IT-built workarounds. Together, they turn tax from a reactive cleanup effort into a controlled, repeatable SAP process.

The PLUS Tools below focus on tax determination and calculation. **We have additional tools available to assist you throughout the rest of the tax lifecycle.**

PLUS Tools are modular and can be adopted individually or as a suite, depending on where teams see the most risk or manual effort.

PLUS Tool	When This Comes Up for You	How It Helps
Drop Shipment	Drop-ship scenarios make it unclear who owns the tax and mistakes surface later.	Applies the correct tax treatment for drop shipments inside SAP, reducing rework, customer disputes, and audit risk.
flexRFC	Tax calls behave differently across billing, invoicing, or AP—and your team ends up fixing issues after the fact.	Standardizes how SAP calls Vertex so tax is right the first time, reducing credits, rebills, and AP exceptions while keeping a clear audit trail.
flexTAX	Tax decisions depend on SAP rules, defaults, or use tax logic that's handled manually or inconsistently.	Lets you apply consistent tax logic directly in SAP—without custom code—so fewer adjustments are needed and use tax outcomes are more reliable.
FLUX Builder	Exemptions don't always apply as expected, creating leakage or audit exposure.	Helps ensure exemption data is captured and applied correctly during determination, improving accuracy and defensibility.
TestSuite	SAP upgrades, transports, or S/4HANA changes make you worry about what might break.	Automatically tests tax outcomes in SAP before and after change so you can move forward with confidence.



Online Selling with Vertex

Vertex E-Commerce Solutions

When your business moves into e-commerce, audit risk increases if tax determination is inconsistent across your ERP, in-store, and online selling channels. You can choose to extend O Series into online sales, create consistency between selling channels, and immediately protect the customer cart. We also offer multiple e-commerce integrations and tools.

Vertex E-Commerce Solutions

Pre-built integrations to online platforms	Pre-built integrations to traditional ERP apps	E-commerce accelerator package with simple APIs for compliant online selling	Custom APIs for additional support
Shopify , Adobe Commerce , commercetools , BigCommerce , and more.	SAP Customer Experience, SAP Commerce Cloud, and more.	Quickly manage SaaS subscriptions, gaming, music, streaming, and more. Supported payment providers: Paypal and Stripe or API link into checkout.	Embed point solutions into any online system for compliant tax calculation, invoicing, VAT ID validation, certificate management, and e-invoicing.





U.S. Address Accuracy

Vertex O Series Address Cleansing & Latitude / Longitude Jurisdiction Locator

U.S. tax rates and rules don't just vary by state—they can change from one street to the next across 12,000+ individual taxing jurisdictions. That's why address accuracy is critical for proper tax determination. Incomplete or incorrect addresses can lead to misapplied rates and exemptions as well as compliance risks—issues that multiply as your business grows.

To help you have even greater jurisdictional accuracy in the U.S., we offer two add-on solutions* to Vertex O Series.

Solution	<u>Vertex O Series Address Cleansing</u>	<u>Vertex O Series Latitude / Longitude Jurisdiction Locator</u>
What it does and why it's helpful	Corrects data issues sent from the source system to improve tax jurisdiction assignment for tax calculation. It uses USPS data and assigns the ZIP+4 to precisely identify the transaction location.	Determines Tax Area IDs based on U.S. latitude / longitude coordinates in real time to define a geo-location where a street address is not available. It's ideal for transactions involving cell towers, oil fields, and pop-up shops.
Key features	You can either add real-time** address cleansing to the Vertex O Series tax engine OR cleanse address files in batches outside your O Series tax engine to improve master data in your source system.	If your source application doesn't support lat / long, you can manually enter or import coordinates from another tool into Vertex O Series.
Benefits	<ul style="list-style-type: none"> ● Reduces risk with more precise addresses. ● Improves jurisdiction assignment for tax calculation. ● Improves tax accuracy for complex transaction locations. 	

*These address solutions are for U.S. transactions only. **Real-time address cleansing is built into O Series cloud license.



Validating VAT IDs and Compliant Tax Invoicing Across Regions



Vertex Validator

In some countries, B2B sellers must validate the buyer's VAT ID number before proceeding with the transaction. It's also required to apply the reverse charge mechanism when needed. But validating VAT IDs manually can be a slow, resource-draining process. As compliance demands increase, so does the risk of errors, missed validations, and potential penalties. To help you stay compliant without the headache, we've made VAT ID validation seamless and automated.

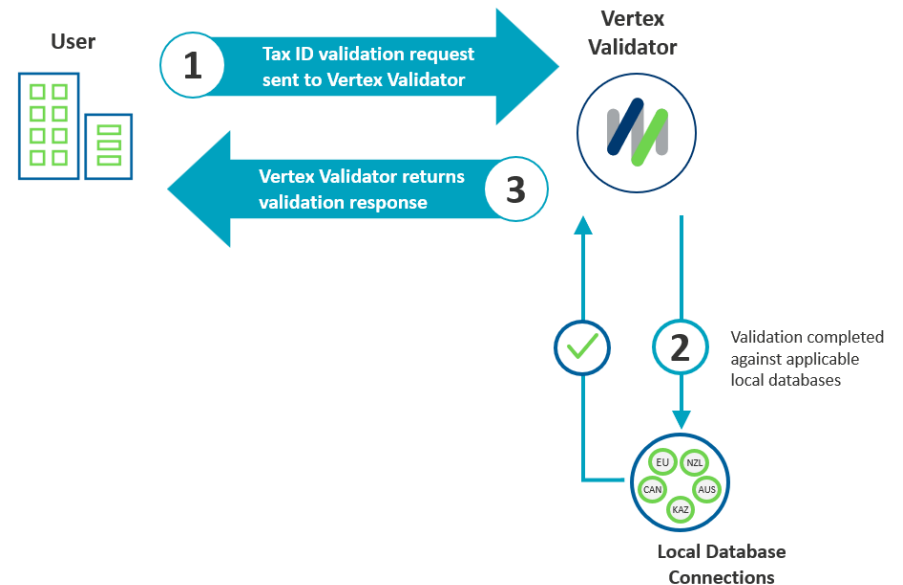
[Vertex Validator](#) automates the validation of business tax IDs to mitigate risk in transacting with a vendor or a customer or complying with the regulatory requirements.

With Vertex Validator you can:

- Conduct the tax ID validation at the most ideal point in your sales journey.
- Properly assess VAT.
- Align tax codes for B2B e-invoicing, reporting, and more.
- Streamline customer and vendor management.
- Help detect fraud at exchange.
- Support audit readiness with ease.

Key Features:

- Supports VAT IDs in 65+ countries.
- Supports single transaction validation, recurring transactions, or bulk validation.
- API integrates seamlessly with existing ERP, CRM, e-commerce, marketplace, or online platforms.
- Provides reports to manage customer tax IDs and support audits.



Need global invoicing help? [Vertex Invoice IQ](#) generates tax-compliant invoices customized to local regulations, languages, and currencies across 70+ countries—perfect if you have localized needs beyond standard ERP invoicing.



Exemption Certificate Management

Vertex Certificate Center and Certificate Service

Missing or incorrectly applied exemption certificates puts businesses at risk for audits and penalties and can negatively impact customer relationships when tax is not accurate. Finding and applying the right exemptions in the right locations at the right levels when you need it is time-consuming, and manual processes often create gaps in compliance or hard to manage processes. On top of that, limited reporting, and the ability to quickly email customers, internal stakeholders, or auditors with the correct information makes inquiries and audit preparation even more stressful.

Our solution, [Vertex Certificate Center](#), automates the collection, validation, application, storage, updating, and communication of sales tax exemption certificates through a single access point across legal entities.

With Vertex Certificate Center you can:

- Gain access to a large form library with built in validation to expedite the collection and approval of certificates according to regulation.
- Gather, create, and sync audit-ready certificate records directly into Vertex O Series for real-time tax determination.
- Set up continual monitoring and schedule communication for soon-to-expire certificates.
- Store all customer exemptions and your company exemptions in a single location with easy look-up, including image transfer tools.
- Run a report of expiring certificates and generate email/letter requests for new certificates.

Vertex Certificate Center also has a self-service certificate wizard which allows your customers to quickly generate and submit certificates from any device through a guided online process.



Don't want to manage exemption certificate renewals? With [Vertex Certificate Service](#), our team will validate new certificates and contact customers to update expiring ones.



Extending Tax Across the SAP Ecosystem

Vertex SAP-Certified Integrations

Many SAP users operate beyond core ERP. We provide SAP-certified integrations that extend consistent tax determination and validation into connected SAP applications, helping you reduce exceptions, improve controls, and maintain accuracy wherever transactions occur.

[SAP-Certified Integrations](#)



SAP Ariba Central Invoice Management (CIM)	SAP Ariba	SAP Commerce Cloud	SAP Business ByDesign
Validates and enriches tax on supplier invoices in SAP Ariba CIM before posting.	Provides real-time tax determination and compliance across procurement and invoicing in the Ariba Network.	Calculates tax in real time for B2B and B2C transactions in SAP Commerce Cloud.	Delivers embedded tax determination for mid-market SAP Business ByDesign environments.
<p>Business Impact</p> <ul style="list-style-type: none"> • Fewer invoice exceptions and approval delays. • Reduced over- and under-payments. • Stronger OK-to-pay controls. • Improved AP efficiency and audit readiness. 	<p>Business Impact</p> <ul style="list-style-type: none"> • More control over indirect tax across requisitions, invoices, and reconciliation. • Fewer PO/GR/IR mismatches and three-way match failures. • Reduced tax leakage from over- or under-payment. • Faster procurement cycles with less rework and exception handling. 	<p>Business Impact</p> <ul style="list-style-type: none"> • Accurate tax at checkout improves customer trust and conversion. • Fewer post-order corrections and billing disputes. • Consistent tax treatment from online transactions through invoicing. • Protected margins in high-volume, omnichannel commerce environments. 	<p>Business Impact</p> <ul style="list-style-type: none"> • Enterprise-grade tax accuracy without heavy customization or IT overhead. • Faster time-to-value for growing or decentralized ERP environments. • Lower ongoing maintenance and support effort. • Improved compliance as mid-market operations scale.



Report, Comply, Pay, and File

Translating tax calculations into compliant reporting is never easy. Manually managing monthly returns, yearly compliance reporting, or real-time e-invoicing without automated compliance solutions can feel overwhelming. It increases audit risks due to accuracy issues and creates a heavy burden during peak filing each month or in real-time with emerging e-invoicing mandates. And instead of focusing on more strategic tasks, your tax staff are bogged down with administrative work. On top of that, you're constantly under pressure to stay on top of changing compliance standards, forms, filing requirements, and e-file formats.

Determine

Calculate

Report

Comply

Pay

File

Retain

Defend

Plan



Sales and Use Tax Compliance

Vertex Indirect Tax Returns – North America, Vertex Express Returns, and Sales and Use Tax Compliance Service

Our solution, [Vertex Indirect Tax Returns – North America](#), generates signature-ready returns for U.S. sales and use tax and Canada sales tax, VAT, and GST.

With Vertex Indirect Tax Returns – North America you can:

- Access 1,400+ return forms for U.S., DC, PR (and e-files for 38 states) and Canada.
- Automate e-file preparation, transmission, ACH debit remittance, and acknowledgement receipts for CA and IL direct transmission.
- Automate workflow, calendar, and document management tools.
- Generate 100+ standard reports, or leverage data to create custom reporting.
- Generate, send, and track payment requests with full general ledger coding.

For O Series Cloud users, we offer one-click, signature-ready returns through [Vertex Express Returns](#).



Want to outsource returns? [Vertex Sales and Use Tax Compliance Service](#) provides return generation, filing, and remittance all with complete transparency and control from a secure online portal.



E-Invoicing and Real-Time VAT Compliance

Vertex e-Invoicing and VAT Compliance

Reporting and remitting value added tax is a complex process. Managing this without a centralized solution creates additional inefficiencies and risks. Yesterday, tax authorities were content with “periodic” reporting—where businesses filed returns and remittance monthly—and reported quarterly or yearly. Today, tax authorities in an increasing number of countries are mandating real-time reporting, a direct data transmission from the company’s source systems. The requirements are more complex, the timing in some markets is collapsed, but, as always, accuracy is paramount. For these reasons, we also offer solutions for end-to-end VAT reporting.

Solution	Vertex e-Invoicing	Vertex VAT Compliance
What it does and why it's helpful	Allows you to create, submit, clear, validate, track, and archive e-invoices worldwide which enables global organizations to comply with multiple local e-invoicing mandates using a single solution.	Automates VAT/GST e-reporting and periodic returns and reporting. This allows you to centralize multi-country compliance within a single solution.
Key features	<ul style="list-style-type: none"> • Support AR & AP processes and multiple invoice types. • e-Invoice creation, validation, submission & clearance on Peppol and/or other relevant jurisdictional portals. • Utilize a single, secure gateway to share data and supporting artifacts to/from the ERP source systems (options: API, SFTP, Prebuilt connectors). • Check for discrepancies between VAT & GST return data (including ESL reports) and e-invoicing data via integrated reconciliation between Vertex e-Invoicing and Vertex VAT Compliance. • Monitor and track AP & AR e-invoice status, download archived, and approve e-invoices with signature files and related artifacts. 	<ul style="list-style-type: none"> • Import tax data files from multiple sources. • Generate signature-ready multi-language VAT/GST returns and filing reports for 56 countries; e-file formats for 23 countries. • Reconcile VAT return data against data from ERPs, including GL, ESL reports, and Vertex e-Invoicing. • Perform data quality checks and data enhancements prior to return filing.
Benefits	<ul style="list-style-type: none"> • Centralizes global e-invoicing in a single solution. • Supports global continuous transaction control. • Supports digital reporting requirements. 	<ul style="list-style-type: none"> • Enables multi-national corporations to support business growth without additional VAT/GST processing burden. • Supports aggregated and consolidated reporting. • Supports SAF-T, UK MTD, and real-time reporting for Spain SII and Hungary RTR. • Supports 2021 EU VAT e-Commerce regulations.

Real-Time VAT Compliance *(continued)*



Vertex VAT Compliance Service

For businesses who prefer not to handle VAT periodic reporting in-house, we offer a VAT compliance outsourcing service.

Solution	<u>Vertex Compliance Service</u>
What it is	We manage global VAT & GST registration, returns, and remittance for you.
Key features	<ul style="list-style-type: none">• Secure online portal for easy data upload and approvals.• Registrations to tax authorities in relevant countries, where needed.• VAT/GST periodic returns and reports are generated in local languages and in compliance with jurisdiction-specific regulations across Europe, Asia Pacific, and other regions.• Filing and remittance to all local jurisdictions, with complete payment visibility.• Centralized dashboard for real-time visibility into returns filed, due dates, and tax liabilities across regions.
Benefits	<ul style="list-style-type: none">• Eliminates the administrative burden of periodic filings.• Reduces the need for in-house tax expertise and cuts costs tied to complex compliance.• Minimizes non-compliance penalties.• Reduces FX exposure.• Provides complete visibility and control of the outsourced process.• Avoids hidden costs and conflicting interest by using Vertex as a single, multi-country vendor.• Allows for more time back in your day to focus on strategic priorities.

Another resource is our Vertex VAT Compliance Extractor, which helps ensure high fidelity tax and invoice data flows directly from your ERP into Vertex VAT Compliance. As a result, you preserve audit trails, organizational structures, and tax procedures—while eliminating manual data mapping and reducing rework.



Compliance Controls Governed Inside SAP

Vertex PLUS Tools: FLUX Monitor, FLUX Builder, and VENDORrecon

Compliance risk often emerges later—when transactions don’t align, vendor data doesn’t reconcile, or compliance signals aren’t surfaced until reporting or audit time. As your transaction volumes grow and regulatory expectations tighten, manual checks and after-the-fact reviews become harder for you to sustain.

The following [PLUS Tools](#) help your team monitor activity, validate outcomes, and surface issues early, without adding manual work or custom development.

PLUS Tool	When This Comes Up for You	How It Helps
FLUX Monitor	You lack visibility into tax relevant activity and don’t know where issues are emerging.	Monitors SAP transactions and tax signals to identify compliance risks early and reduce surprises during reporting or audit.
FLUX Builder	Exemptions or compliance rules aren’t applied consistently across transactions.	Governs how exemption and compliance logic is applied inside SAP, improving consistency, accuracy, and audit defensibility.
VENDORrecon	Supplier invoices, tax amounts, or accruals don’t reconcile cleanly.	Flags discrepancies between SAP, vendor invoices, and expected tax outcomes so issues can be addressed before close or audit.

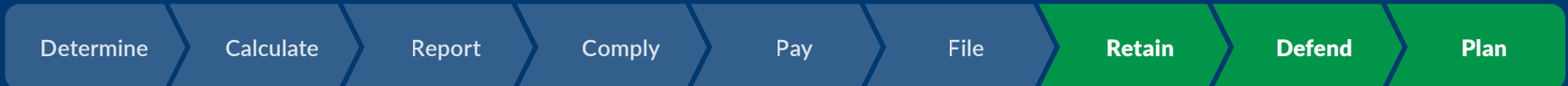
Together, these PLUS Tools help you move from reactive compliance checks to proactive control—improving visibility, reducing manual reconciliation, and supporting audit ready outcomes.

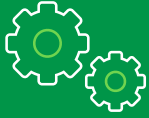


Retain, Defend, and Plan

We understand that tax compliance doesn't end once returns are filed. You're constantly navigating the audit cycle and need reliable data to support your tax position. One of the biggest reasons to automate tax processes is to ensure you have the necessary historical data and documentation for audit defense.

That's why the solutions we've developed include robust reporting functionality and document storage (where it makes sense), giving you quick and easy access to the data, certificates, forms, and reports you need. Whether you're preparing for an audit, answering customer or vendor inquiries, reconciling books, or proactively managing tax liability across jurisdictions, our tools help you stay ready and in control.





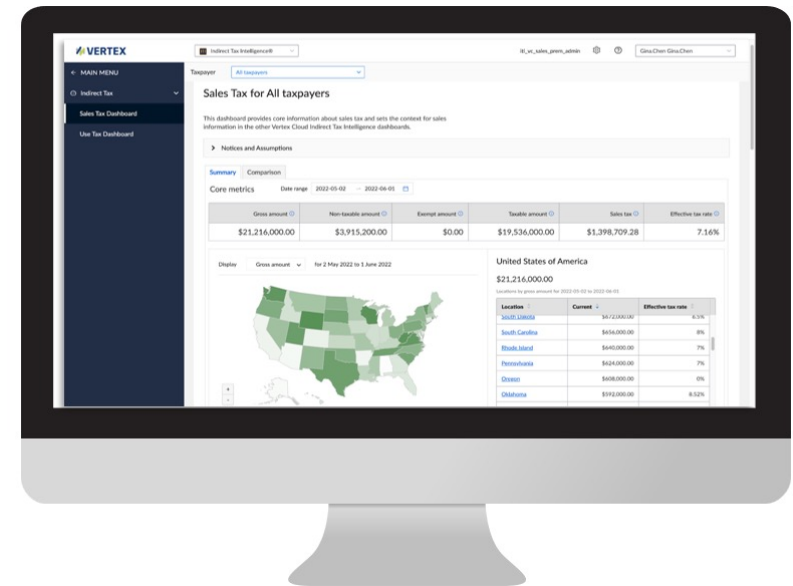
Tax Data Intelligence

Vertex Indirect Tax Intelligence

When surveyed, tax professionals consistently rank complex tax reporting as one of their biggest challenges. Without the right tools, ensuring accurate filings, tracking tax performance, and proactively identifying risks becomes a daunting task. That's why we designed a solution that transforms your data into actionable insights—empowering tax teams to improve compliance and optimize tax engine performance.

Vertex Indirect Tax Intelligence* is a cloud-based data visualization and risk management tool that provides your tax team with data-driven, actionable insight to help you improve calculation engine configuration, data quality, tax performance, and compliance.

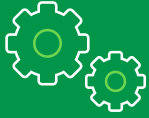
The solution combines O Series transaction and configuration data with Vertex tax content (i.e., rates and product rules) to deliver a series of dashboards with summary views and easy drill-down capability to support compliance, audit, and transaction review.



Vertex Indirect Tax Intelligence includes:

- **Indirect Tax Dashboards (Sales Tax & Use Tax):** Track sales and use tax activities with state-by-state summaries, filtering, and drill-down options to analyze trends and variances.
- **Economic Nexus Dashboard:** Monitor transaction volumes against state nexus thresholds to anticipate registration and reporting needs.
- **Audit Risk Dashboard:** Identify audit risks by tracking data variances, new business activities, and changes in tax amounts across jurisdictions.
- **Accuracy Risk Dashboards (Sales Tax & Use Tax):** Assess tax rate changes and legislative updates to ensure more accurate tax engine configurations and minimize exposure.
- **Configuration Risk Dashboard:** Detect potential risks from outdated tax engine settings or changes in ERP master data.
- **Completeness Risk Dashboard:** Reconcile ERP transactions with tax engine data to help ensure comprehensive tax coverage and accuracy.

*This solution supports sales use tax and consumer use tax only. It is also only available via O Series Cloud.



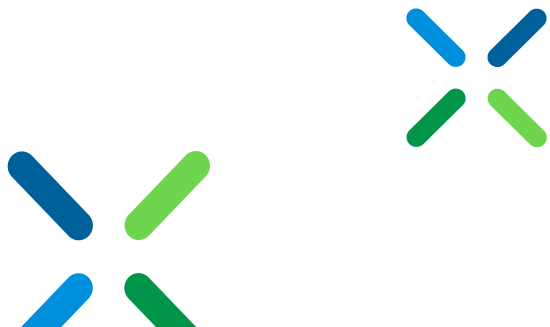
Tax Readiness and Audit Defense Inside SAP

Vertex PLUS Tools: FLUX Monitor, DiagnosTax, and TestSuite

As SAP environments change and scrutiny increases, your tax team needs to be able to retain defensible outcomes, identify and resolve issues quickly, and plan confidently for what's next, without relying on reactive cleanup or manual analysis.

These [PLUS Tools](#) help you to monitor outcomes, diagnose root causes, and validate future changes directly inside SAP. With these tools, you can move from reactive response to proactive readiness.

PLUS Tool	When This Comes Up for You	How It Helps
FLUX Monitor	You need ongoing visibility into tax relevant activity to support audit defense and issue tracking.	Continuously monitors SAP transactions and tax signals so potential issues are identified early and defensible records are maintained.
DiagnosTax	You know tax outcomes are wrong—but it's unclear <i>why</i> or where the issue originated.	Analyzes SAP and tax data to pinpoint root causes, helping teams resolve issues faster and reduce repeat errors.
TestSuite	You're planning upgrades, transports, or process changes and need confidence before moving forward.	Tests tax outcomes in SAP before and after change so you can plan releases, migrations, and fixes with confidence.





Beyond Tax Determination: Customer Stories

These customer stories show how SAP organizations expanded their Vertex footprint to move beyond tax determination.

QuidelOrtho | Accelerator+ and PLUS Tools

Operating across dozens of countries, QuidelOrtho needed stronger control over exemptions, vendor-charged tax discrepancies, and reconciliation across both order-to-cash and procure-to-pay. By layering **Vertex Accelerator+ for SAP ERP** and selected **PLUS Tools**, including **flexRFC AR** and **VENDORrecon**, on top of **O Series**, the team reduced manual exception handling and improved audit visibility across SAP S/4HANA and SAP Ariba.

[View Customer Story](#)

“The Vertex solutions significantly reduced manual exception handling and improved audit transparency across SAP.”
– QuidelOrtho, Tax Operations Team

Costco Wholesale | Ariba Connector and Multi Channel Commerce

As Costco expanded tax coverage across multiple digital channels—including B2C, B2B, kiosks, and internal procurement—it needed a consistent way to maintain accurate tax outcomes beyond its core e-commerce implementations. Extending its use of **O Series** with additional integrations—including the **Vertex connector for SAP Ariba-based procurement**—allowed Costco to improve tax accuracy across systems while supporting a long-term modernization strategy that could adapt as business needs evolved.

[View Customer Story](#)



Brückner Group | e-Invoicing and VAT Compliance

Operating across 17 countries with complex VAT and transaction requirements, Brückner Group needed a scalable way to meet growing e-invoicing and real time reporting mandates without disrupting existing SAP processes. By extending their Vertex footprint with **Vertex e-Invoicing, integrated with O Series for SAP S/4HANA**, Brückner centralized invoice processing, improved consistency across entities, and reduced manual errors while strengthening audit readiness and long-term compliance.

[View Customer Story](#)

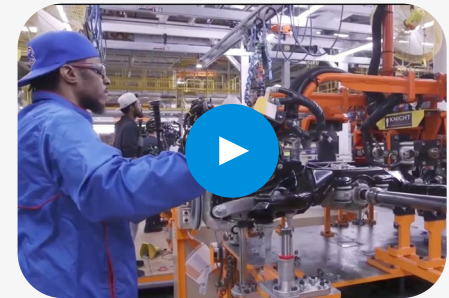


Beyond Tax Determination: Customer Stories *(continued)*

Ford Motor Company | Accelerator+ and Ariba Connector

As Ford expanded into services, digital offerings, and electric vehicle charging, VAT complexity increased rapidly across regions and transaction types. Managing frequent VAT rule changes internally became unsustainable across SAP and SAP Ariba landscapes. Integrating **O Series with SAP and SAP Ariba—supported by Vertex accelerators—**enabled Ford to centralize VAT rule management and positioned tax operations to support new business models and future real time reporting requirements.

[Watch Video](#)



Salt River Project (SRP) | PLUS Tools

Before automation, SRP relied on manual use tax reviews and delayed adjustments, which increased risk and consumed tax team capacity. By extending its SAP deployment with **Vertex PLUS Tools**, including **flexRFC AP**, SRP automated use tax adjustments, and improved control across purchasing and accounts payable, enabling same period corrections and stronger compliance.

[View Customer Story](#)

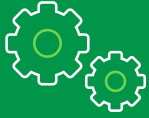
“Instead of having compliance, spreadsheets, or manual processes filling your entire day, you have processes that pretty much take care of themselves now.”

– Manuel Ernesto Mulato, Manager, Corporate Taxes, Salt River Project

Ryerson | PLUS Tools

Despite having accurate determination in place with **O Series**, Ryerson struggled with manual management of exemption certificates and tax credit processing in SAP. By extending its environment with **Vertex PLUS Tools**, including **FLUX Builder** and **flexRFC AR**, Ryerson automated exemptions and tax only credits directly in SAP—reducing rework and improving audit readiness.

[View Customer Story](#)



Getting Started: Extending Value Beyond Tax Determination in SAP

You already trust Vertex O Series to determine tax inside SAP. The next challenge is maintaining tax stability, efficiency, and defensibility as SAP continues to evolve.

With additional Vertex solutions, you can:

- **Improve audit readiness** with consistent, traceable configuration and evidence.
- **Reduce AP and AR exceptions** with automated corrections, certificate handling, and reconciliation.
- **De-risk SAP changes** using automated, SAP native tax testing.
- **Stabilize integrations** by reducing fragile custom ABAP and standardizing configuration.
- **Maintain tax continuity as SAP evolves** from ECC to S/4HANA, RISE, and new compliance frameworks.

The result is predictable, controlled tax operations—without tax becoming a blocker to SAP progress. These upgrades modernize and stabilize your Vertex + SAP environment without replacing the tax engine you already trust.

Common Next Steps for SAP Users

- Stabilize configuration → Accelerator+
- Reduce exceptions → PLUS Tools
- Meet real-time mandates → e-Invoicing + VAT Compliance





Contact Us

Managing indirect tax effectively requires more than just addressing individual steps—it demands an end-to-end approach that helps to ensure accuracy, efficiency, and compliance across the entire tax lifecycle. From determination and calculating, to reporting and filing, each step plays a crucial role in mitigating risk and optimizing tax operations. Our end-to-end portfolio provides automation to support every stage, empowering you to navigate business operations and support growth with confidence.

Talk with us today about where you may have risk—or opportunity—across your SAP tax lifecycle.

North America

Latin America

Europe

Asia Pacific

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