How Avalara and Oracle make taxes less taxing for enterprises

What you need to know about Avalara's global, cloud-based compliance platform

Avalara + ORACLE

Contents

Why Avalara for Oracle is the answer for enterprise tax compliance

Navigating the intricacies of tax compliance poses significant challenges for enterprises. From disparate data sources to overburdened compliance teams and transaction delays caused by manual processes – the landscape is rife with complexities that prevent operational efficiency.

To overcome these hurdles, a solution is needed that is not only efficient but also customizable, flexible, and secure. Enter Avalara – a pioneer in cloud-based, scalable global tax compliance solutions for Oracle customers of all sizes.

Avalara helps thousands of enterprises, including more than a third of the Fortune 1000, get tax right with an integrated suite of cloud-native solutions. Avalara connects the pieces of the global tax puzzle through unified cloud-first modular solutions and managed services that leverage tax experts to help you scale.

> **Working closely with Avalara [enables] us to remove unnecessary friction and inefficiencies in tax compliance by automating tax processes for our joint customers. With Oracle Cloud ERP, organizations can embrace automation and continuous innovation to increase productivity, reduce costs, and improve controls.**
>
> –Rondy Ng,
> EVP of Applications
> Development at Oracle

ORACLE

About Avalara for Oracle

Avalara and Oracle have collaborated since 2013 to alleviate the burden of tax compliance and to support growing businesses by automating regulatory requirements. At Avalara, we specialize in providing enterprises with the tools they need to streamline their tax compliance processes. Our cloud-based solutions are not only scalable to global enterprises but they are also customizable to adapt to the unique requirements of each enterprise.

Avalara for Oracle is a best-in-breed integration platform, offering advanced configuration and testing to enable connection to multiple Avalara products across multiple ERPs, all supported by a seasoned Oracle development team. Avalara's top tier business assets help Oracle customers and partners create a one-stop shop for Oracle global tax compliance. This technology furthers our ability to provide products and services specific to enterprise organizations and their partners and extends our list of integrations that enable interaction between our tax compliance solutions and Oracle Cloud ERP, E-Business Suite, JD Edwards, and PeopleSoft.

The benefits of having this type of integration available and in-house are extensive:

Rapid implementation via turnkey activation: Integrate core parts of the Avalara offering within hours, reducing implementation time by weeks and saving your team countless hours of data formatting and configuration
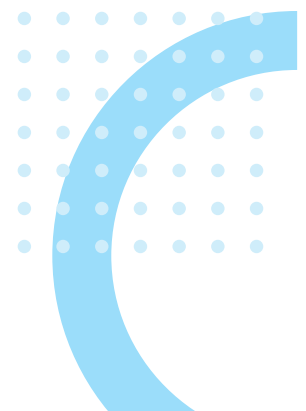
to O2C or P2P implementation schedules. The tax setup is completed automatically, with activation status displayed directly in the Oracle user interface. Fully automated tax compliance management leverages regularly-updated tax content for more than 900,000 tax rules across more than 30,000 U.S. tax jurisdictions to maximize accuracy of tax calculations. In addition, a single dashboard enables simple and efficient tax return preparation and filing.

Extended features and functionality: A single Oracle Cloud ERP integration provides access to critical compliance capabilities, like tax calculations and reporting. Customers also have access to additional compliance solutions, including exemption certificate management, business licensing, cross-border compliance, and e-invoicing. Avalara offers support for industry-specific tax types, such as communications, oil and gas, and energy, allowing businesses to easily scale their automation to address new and expanded compliance obligations.

Enterprise-ready technical support: Avalara partners with Oracle to offer top-tier technology and support, aligning with Oracle's mission to bring cloud-based solutions to global enterprises. Avalara achieves this through automated tools that seamlessly integrate into Oracle solutions, delivering tangible cost savings for businesses while enabling them to keep stride with the rapid pace of operations.

Comprehensive testing: With over 130 automated tests (and counting) for new Oracle Cloud ERP releases, Avalara offers the most comprehensive testing tools to help ensure tax compliance services get set up properly.

Tax solutions powered by intelligent automation: The Oracle Cloud ERP integration gives customers seamless access to Avalara's artificial intelligence-powered compliance solutions to enhance the product experience and streamline tax management. Today, Avalara leverages AI to enable customers to detect and extract data from exemption certificates, map Harmonized System (HS) and tax codes, and more.

Avalara products and services for enterprises

We can help you reduce the time and cost associated with managing tax compliance, including registering for business licenses, calculating taxes, filing VAT/GST returns, and managing licenses and certificates across the full life cycle.

Avalara E-Invoicing and Live Reporting

Avalara E-Invoicing and Live Reporting was designed to help enterprises automate finance processes and comply with global e-invoicing requirements Avalara is included in every Oracle Cloud ERP pod as a seeded service provider for e-invoicing. E-Invoicing and Live Reporting is built on the same best-in-class platform as other powerful solutions such as Avalara AvaTax, using our advanced Oracle Cloud ERP connector technology that runs on Oracle Cloud Infrastructure.

You don't need to overhaul your systems. You don't need to manually upload invoices for each country. You don't even need to stay on top of ever-changing requirements and emerging legislation. E-Invoicing and Live Reporting makes compliance easier – and far more efficient.

With E-Invoicing and Live Reporting your team benefits from:

- A stand-alone solution: Although it works seamlessly with AvaTax and our other products, you can use E-Invoicing and Live Reporting no matter what tax engine you use with Oracle Cloud.

- Broad global coverage: Functionality for outgoing (AR) and incoming (AP) documents with support for Peppol (i.e. AU, JP, NZ, NO,

DE) and non-Peppol (i.e. IT, PL, ES) countries, with coverage for HU, PT, and more coming during fiscal year 2024.

- Enriched e-invoice data: Meet specific tax authority requirements with Avalara's Universal Business Language (UBL) extension to capture any field when running generate and transfer XML. It has the ability to embed PDF or other attachments to meet tax authority requirements.

- Centralized live reporting: A single hub to monitor document statuses, with live acknowledgment for acceptance or rejection by tax authorities and configurable data validation to reduce rejection of invoices. If an invoice is rejected by the authority the credit memo is suppressed to allow for correction.

- Higher efficiency and lower risk: Managing e-invoicing manually means putting time and resources toward a complex process, while increasing the risk of human error. E-Invoicing and Live Reporting frees up those resources and reduces compliance risk — we're constantly monitoring requirements and making updates, so your people don't need to.

Avalara Cross-Border

Lower costs and increase revenue while maintaining control of your customers' cross-border experience. The end-to-end international tax and compliance platform includes industry-leading tools that plug and play with almost any existing business system.

Avalara Exemption Certificate Management

This next-generation solution sets a new industry standard, helping you reduce risk, drive efficiency, and improve customer satisfaction.

With Avalara Exemption Certificate Management (ECM) Premium, you can:

- Track certificate expiration and proactively request new ones, reduce potential errors through automated workflows and validation, and respond to audits quickly and with confidence.

- Reduce the time required to collect, review, and manage certificates; minimize the effort to track tax laws and expiry dates;

> **"**
>
> **One of the reasons we chose Avalara over its competition was that it allowed us to develop much more innovative and useful automations that can be integrated into our normal workflow.**
>
> –Posky Idnani, EMEA Tax Manager, Acer

acer

reduce administration time to review and validate certificates; and eliminate IT and security costs to maintain in-house systems and reduce the need for in-house expertise.

- Decrease customer time to upload valid certificates, help customers select and complete the right forms, and allow customers to manage their own certificates securely.

ECM Premium supports complicated exemption management and high-volume storage of certificates. Configurable options combined with automated workflows simplify and dramatically improve collection, validation, and maintenance processes for your business's exemption certificates. Stand-alone options provide easy integrations to existing third-party tax engines and business applications for unified workflows.

With ECM Premium automated validation and renewal, you benefit from:

- Avalara Certificate Express, which reviews certificates entered through the customer portal with a simple collection process.
- Optical character recognition (OCR) and machine learning, which scans, reads, and digitizes certificates to capture field data and intelligently recognize incorrect forms and information or missing signatures.

Additionally, when you take advantage of Avalara ECM Managed Services, we take care of all the heavy lifting associated with ongoing maintenance of exemption certificate management, including inbound customer support and education.

Avalara for Excise

Avalara AvaTax for Energy integrates with Oracle for Oil and Gas pricing processes to automate the identification and calculation of indirect taxes on fuel transactions. It's a unique, out-of-the-box solution for fuel suppliers, distributors, and traders that provides comprehensive support across excise taxes, environmental taxes, VAT, and sales and use taxes.

We needed a software solution that was easy to use, easy to plug in, and had the back-end side of tax compliance Zillow Group needed ... (With Avalara) the implementation was really smooth. Within a couple of hours, we had our development sandbox up and we were evaluating transactions.

–Jason Heckel,
Senior Director of Tax,
Zillow Group

Zillow

Avalara for Oracle Fusion is built on Oracle Cloud Infrastructure and is the only certified Fusion excise connector in the market. Designed to map Oracle fields to the tax values from AvaTax for Energy, enabling automatic validation and more accurate determination of multiple taxes on invoices. This prebuilt integration and fuel and tax calculation solution reduces both startup and ongoing costs for tax and IT departments, cutting implementation time and streamlining production operations.

Use Avalara for Excise to:

- Reduce the risk of compliance errors: As a cloud-based solution, Avalara provides regularly updated rates, rules, and forms required for ongoing compliance, improving accuracy and reducing risk.

- Simplify energy tax management: Avalara solutions integrate with other business systems to give you a single source of tax data. Scenario-based architecture allows you to create custom rules without needing help from IT or developers.

- Support business growth and agility: Run tax scenario simulations to see how new products, carriers, or markets affect your overall tax liability before you expand to maintain compliance while you grow. Avalara's solutions are modular, so you can build the solution you need now based on the products you currently sell and add to it as your business needs evolve.

Avalara for Communications

Avalara AvaTax for Communications makes it easier to identify and calculate communications taxes, fees, and surcharges that may be responsible for communications tax liability as your business expands product scope. AvaTax for Communications handles the most complex communications tax calculations, like tax on tax, tiered taxation, self-taxing rates, and tax inclusive – even when they're bundled. Extensive historical rate and application history are included, and clear output is provided to improve accurate invoicing.

Avalara Returns for Communications manages communications tax returns preparation, filing, and remittance to save your team time

while reducing audit risk. Minimize out-of-cycle activities like notice management and resolution, back-filing, and monitoring of tax and form changes. This solution integrates directly with AvaTax for Communications for a streamlined one compliance solution or as a stand-alone product.

With Avalara for Communications you enable your team to:

- Streamline with one compliance solution: Reduce overhead while minimizing risk and frustration by using a single platform for all your tax compliance needs, including address validation, calculation, returns filing, and exemption management – built on exceptional expertise, reliable support, and hardened technology.

- Efficiently manage tax risk: Avalara's communications tax team closely follows changing rules, rates, and legislation in all U.S. tax jurisdictions. Our fully integrated SaaS solution then regularly updates both tax rules and returns forms, so your team spends less time handling the details.

- Reduce friction in customer experience: Avalara's native SaaS solution provides 24/7 availability and elastic scalability for large batch transactions or high-volume calculations at the point of purchase.

- Stay nimble in a dynamic tax ecosystem: Our dedicated communications tax specialists have extensive knowledge on both the latest industry trends and changing tax rules and legislation.

Avalara Tax Content for Retail

Avalara Tax Content for Retail manages complex tax scenarios for offline tax calculation at brick-and-mortar locations, providing deeply researched content relevant to your business, either in Avalara's standard for offline content or transformed into Oracle Retail Xstore. The content accounts for sales tax holidays, multiple locations, threshold taxes, and more.

Use Avalara Tax Content for Retail to:

- Keep your Oracle Retail Xstore systems prepared for complex tax situations, including sales tax holidays and threshold taxes, across multiple jurisdictions.

- Tailor Oracle Retail Xstore tax content configurations to meet unique business needs across brands, products, and service lines quickly.

- Replace manual processes with scheduled, automated tax data, preventing the most common risks and burdens caused by manual tax updates to your Oracle Retail Xstore systems.

Avalara Property Tax

Avalara Property Tax is a secure hub for real property and business property tax information and tax-related activities. It automates data entry for critical assessment notices and tax bill document management, deadline management, asset categorization, and depreciation schedules.

Use Avalara Property Tax to:

- Automate data entry: Avalara scans your tax bills and extracts key data that is checked by machines and humans for greater accuracy. Data is then appended to accounts to help ensure that your team has all the required information to file your returns.

- Combine tax documents in a single hub: Bills, assessments, returns, documents, appeals, and other forms are centralized across 20,000+ jurisdictions.

- Minimize tax penalty costs: Avalara Property Tax Documents' due date calendar auto-populates with default data and customer specific dates to help you avoid missing deadlines and take advantage of any discounts. Avalara Property Tax Advisory Services can also provide appeals support.

Avalara Property Tax has helped Comcast reduce the manual effort associated with processing and filing thousands of property tax returns that were due every two weeks of the first six months of the year.

Avalara Tax Research

Quickly access the tax research your team needs to stay ahead of potential audits with Avalara Tax Research. Direct access to tax researchers and self-service access to updated transaction tax rules,

> **We were doing all allocations manually, and then printing and mailing the returns for each jurisdiction. ... We needed a consistent, centralized process that was accessible for everyone on the team.**
>
> **—Allyssa DeCenzo, Property Tax Manager, Comcast**

COMCAST

rates, and regulations help with tax decisions in both the U.S. and internationally.

With Avalara Tax Research, you can:

- Save time and frustration with explanations that are easy to search for, understand, and reference.
- Reduce the cost of manual research.
- Eliminate manual tracking of taxability history.
- Get answers to questions about complex scenarios, like drop shipping, through intuitive decision trees.
- Increase confidence via unlimited Q&A with tax researchers.

Avalara 1099 & W-9

Avalara 1099 & W-9 makes it easier to collect, manage, and e-file your IRS forms, saving your team time to refocus on value-added activities.

With Avalara 1099 & W-9 you can:

- Streamline vendor information: Avalara stores vendor information while performing real-time TIN matching with the IRS.
- Reduce risk with vendor information management: Avalara 1099 & W-9 stores IRS Forms W-9, 1099, and more in a central and secure location where they are accessible for an IRS audit, flagging errors before e-filing your documents.
- Improve efficiency: A paperless process from start to finish, Avalara 1099 & W-9 automatically e-delivers 1099 copies to recipients and e-files with both the IRS and individual U.S. states that require extra filing.

Avalara Returns

Offload the high cost and hassle of returns preparation, filing, and remittance so your team can focus on more important parts of your business. With Avalara Managed Returns Premium, dedicated tax specialists provide simplicity through timely transactional tax filing and remittance. File returns, remit payments, and manage notices using a single payment solution. Whether the jurisdiction requires

e-filing or hard-copy returns by mail, Avalara does all the work so that your team can focus on more important projects while you maintain control through liability review and approval.

With Avalara Returns, you can:
- Save time by removing the manual tasks that expend your resources.
- Reduce costs and focus on more important parts of your business.
- Improve accuracy and reduce audit risk.

Avalara processed more than 4.5 million domestic returns (U.S. and Canada) and more than 660,000 international returns (Brazil and EMEA) in 2022.

Avalara License Management

Cloud-based business license management software that lets you centralize hundreds to thousands of business licenses, permits, and tax registrations through a single application.

With Avalara License Management, you can:
- Drop the spreadsheets and other manual systems.
- Help users to pick up tasks where others left off.
- Scale for growth to manage thousands of licenses.
- Save time and let the app research licensing requirements for you.
- Assign select portfolio access and ownership to multiple users.

Increase collaboration across departments, which is critical for businesses with high-volume lease and license management. In addition to Avalara License Management, you can engage with Avalara License Managed Services for the ongoing maintenance of your business licenses and to empower you to maintain compliance. It can free your staff to focus more on activities that drive profitability. It also provides you with 24/7 access to a portal that lets you track the work we do for you on your behalf.

Because we run lean here, we didn't want our IT people to take on any part of this system. In the end, we only had to provide our data and Avalara did the rest.

–Heather Parker, Compliance Officer. LAZ Parking

Avalara is here to help

Our mission is to solve indirect tax compliance pains for customers so they can focus on what they do best. We're driven to automate tax compliance for every transaction in the world by building the world's best software-as-a-service (SaaS) platform that delivers cloud-based calculation, collection, and digital storage of all compliance documents as well as fully automated filing and fund remittance.

Streamlined implementation via turnkey activation

Integrate core parts of the Avalara offering within hours, reducing implementation time by weeks. The tax setup is completed automatically, with activation status displayed directly in the Oracle user interface. Our platform was built for Oracle's Cloud Infrastructure and does not require client-server software installation or maintenance.

Unified turnkey solution

With Avalara embedded in Oracle Cloud ERP, manual indirect tax setup, configuration, calculations, and complexities from every transaction are removed – saving businesses valuable time and lowering their overall risk of calculating taxes incorrectly or filing the wrong returns. All in a single dashboard.

Enterprise-ready customer support

We know that direct access to savvy technical support is critical to your compliance efforts. Avalara partners with Oracle to offer top-tier technology and support, aligning with Oracle's mission to bring cloud-based solutions to global enterprises. Avalara achieves this through automated tools that seamlessly integrate into Oracle solutions, delivering tangible cost savings for businesses while enabling them to keep stride with the rapid pace of operations.

If you're unable to locate your answer on our extensive Avalara Help Center, our trained team of technology and tax professionals can assist you through email, web-to-case, telephone, or chat.

Better together

Avalara's strategic partnership with Oracle goes beyond stand-alone tax compliance solutions. It represents a commitment to providing businesses with a holistic and integrated approach to indirect tax compliance. Together, Avalara and Oracle empower enterprises to navigate the complexities of tax compliance seamlessly, ensuring accuracy, efficiency, and compliance throughout the entire business process life cycle. The combined power of Avalara and Oracle delivers a comprehensive solution for businesses operating in a global and dynamic marketplace.

To learn more about how cloud-based solutions from Avalara can help you meet your global tax compliance challenges, <u>reach out to a sales representative</u>.