



# Vertex Indirect Tax O Series

## Migration Planning

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# Agenda

## Migration

> Goals | Strategy | Framework

## Architecture

> Current | Interim | Target

## Go-Live

> Cutover Plan

# Common motivators to migrate and modernize

Capacity  
Demands

Licensing and  
Support

Business  
Innovation

Rationalize Costs

Datacenter  
Contracts

Refresh Cycles

Acquisitions

Compliance and  
Security



# Goals

## Migration

- Migrate Vertex from CMO to FMO
- Vertex SIC migration to O Series box

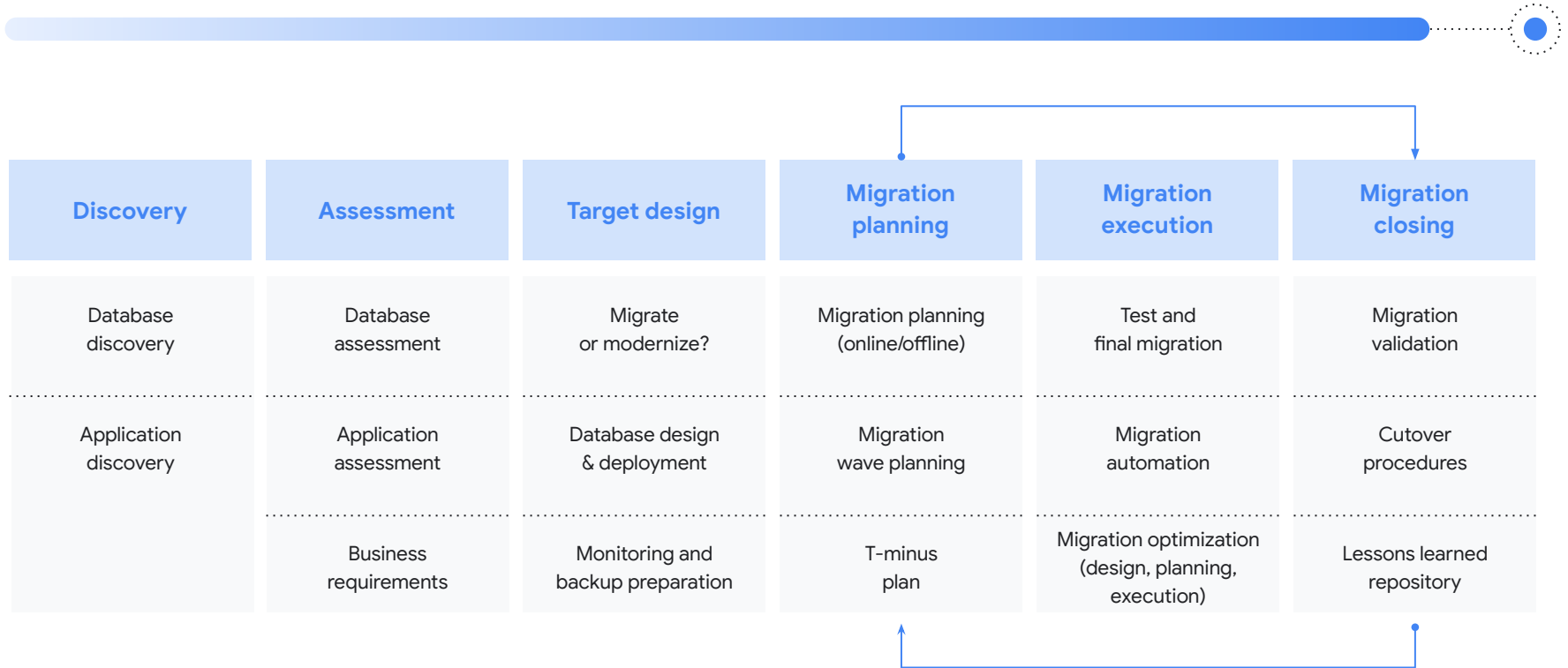
## Re-architecture

- Remove all DTNA related data
- SSO Integration with MBUSA

## Process Improvement

- Streamlined User Access Management
- Improved Vertex documentation

# Migration Strategy



# Migration Framework

Discovery

Assessment

Target design

Migration  
planning

Migration  
execution

Migration  
closing



Tools



Best Practices



Input



Setup  
assessment tools



Assessment  
reports



Technical  
Design Doc  
(TDD)



T-minus  
Plan Doc



Output



Assessment  
reports



Technical  
Design Doc  
(TDD)



T-Minus  
Plan Doc



Automation  
and scripts



Iterate on  
TDD and  
T-Minus Plan



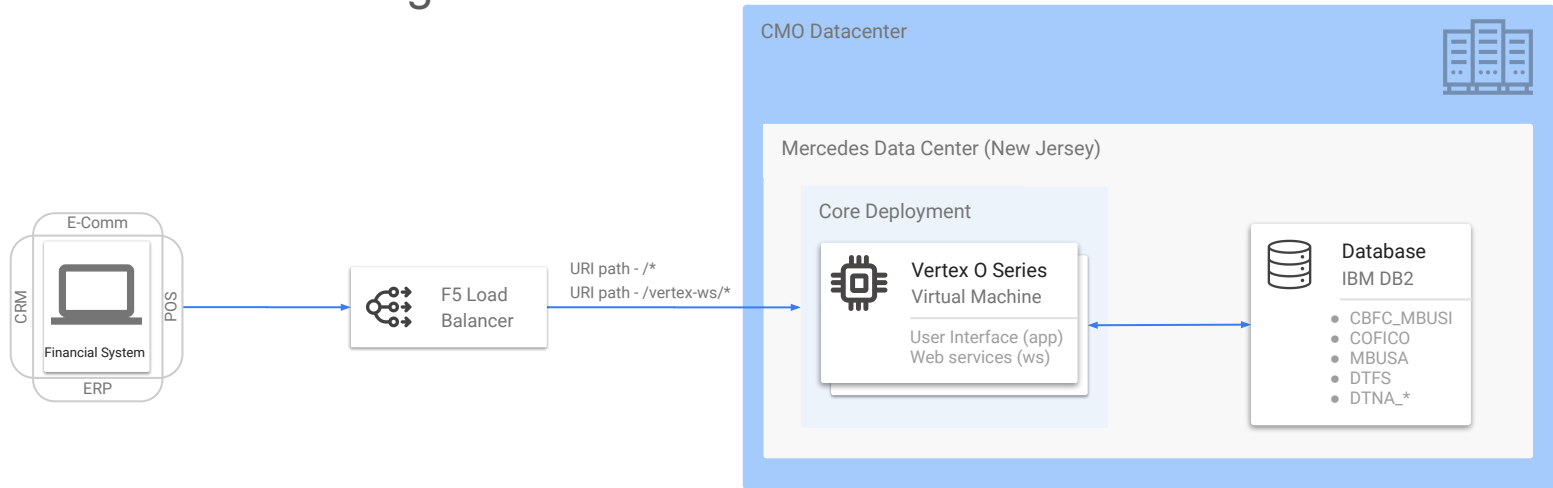
Database &  
application  
migrated



Production  
acceptance

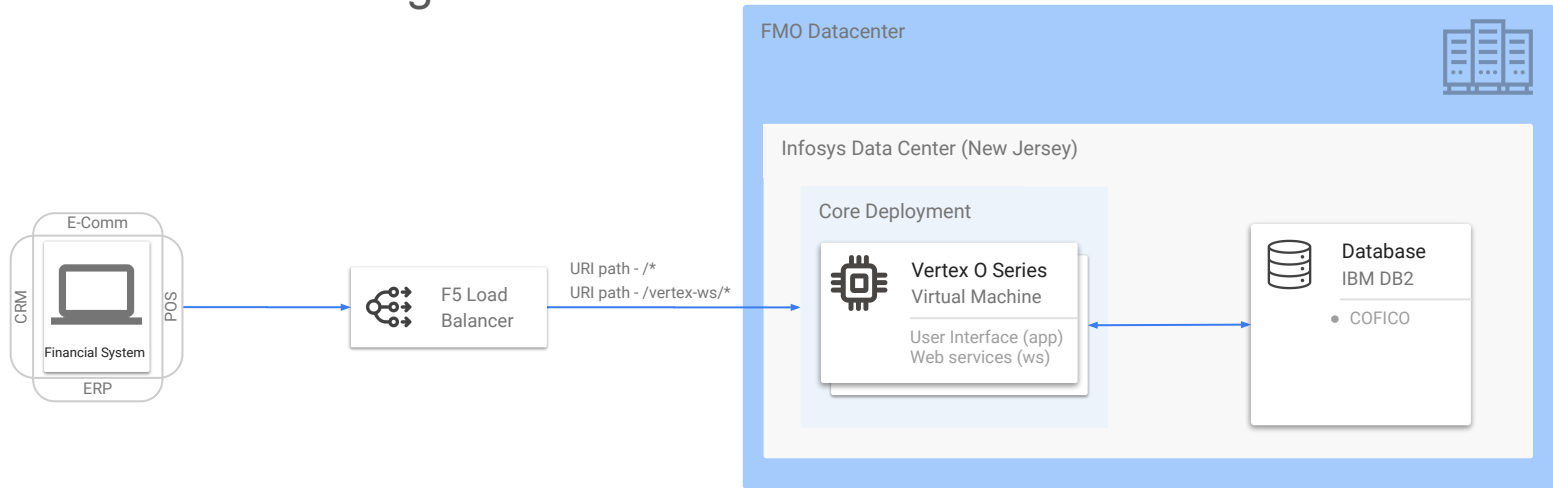
# Current State

Core deployment is the minimum deployment of Vertex Indirect Tax O Series for web-services based integrations.



# Interim State

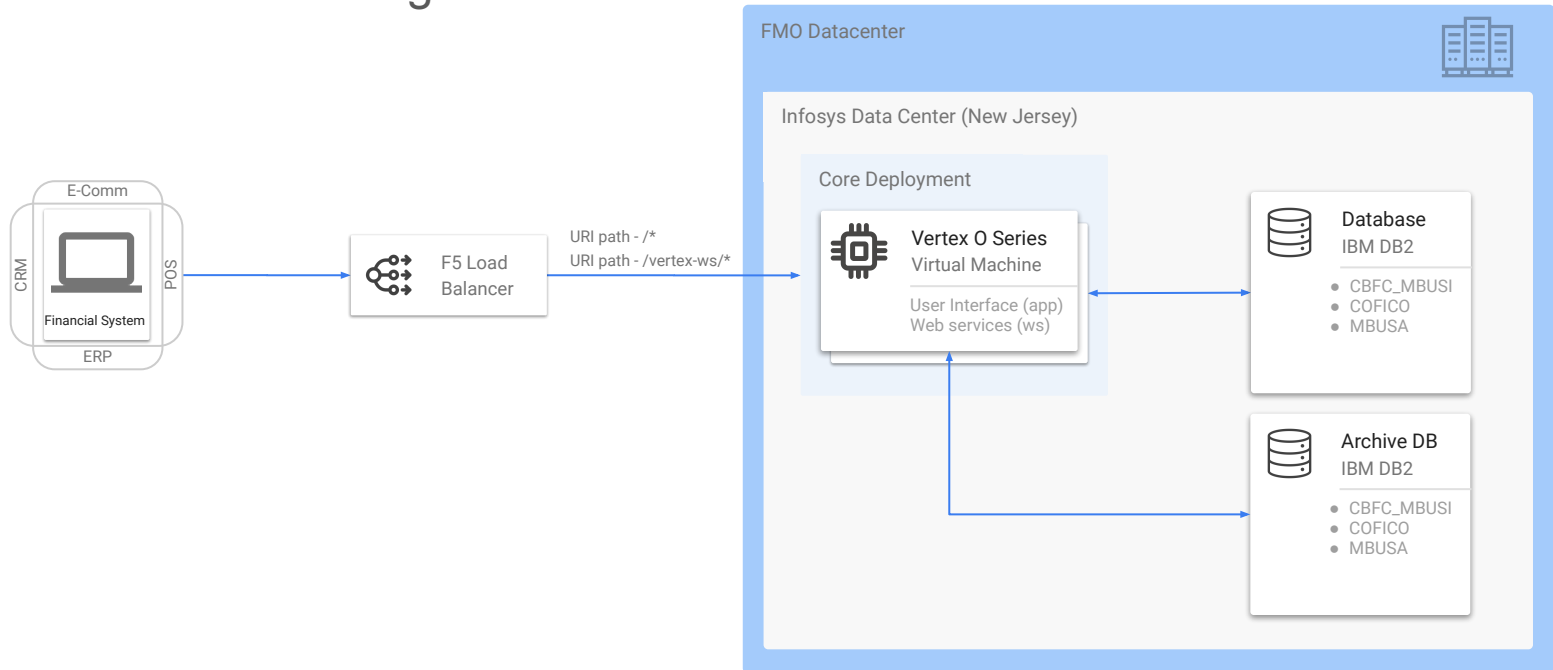
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# Target State

Core deployment is the minimum deployment of Vertex Indirect Tax O Series for web-services based integrations.



# Introducing Managed Vertex Indirect Tax SaaS



Cloud enabled and fully managed solution to maximize operational efficiency, improve performance, and security.

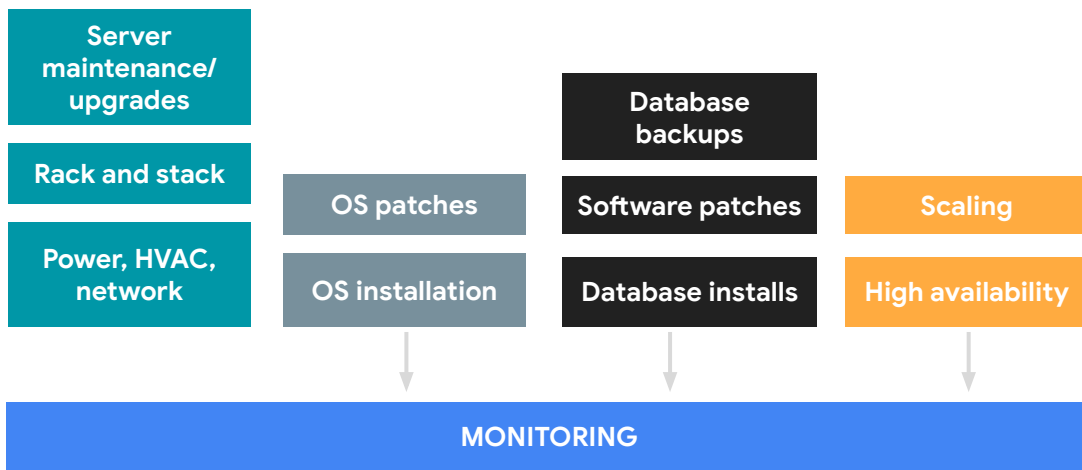


# Managing Vertex On-Premises

Building, running, and maintaining infrastructure means less value realization of your Vertex investments.

Every layer of the stack requires attention—hardware, OS, and database.

Don't forget monitoring.



# Make more time for innovation with Managed Vertex Indirect Tax SaaS



## Benefits

- Auto-healing deployments with up to date tax content and patches
- Optimized database performance for robust tax reporting
- Significantly reduced maintenance and operational costs



## Features

- Automated backups and auto-renewing SSL certificates
- Fault resilient and scalable deployment architecture
- Zero-trust based security configuration

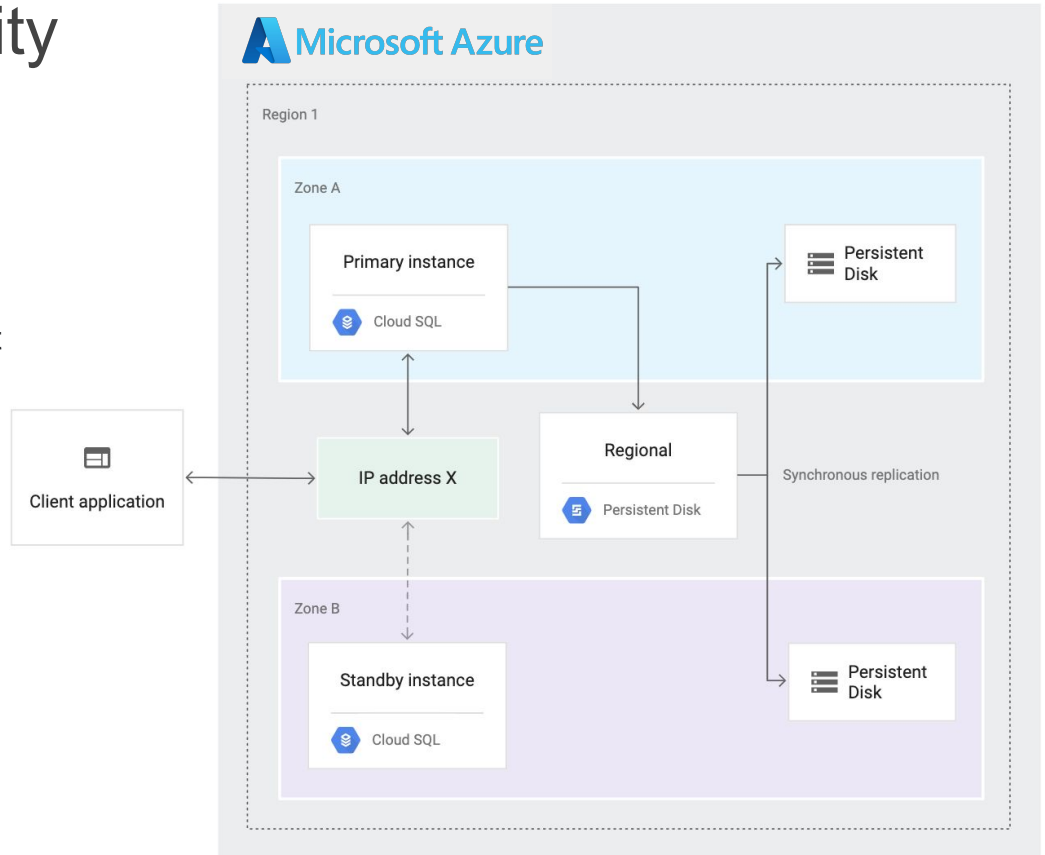


## The power of the platform

Take advantage of the broader capabilities of your Cloud provider

# Achieve high availability

- Built-in high availability option
- Continuous monitoring with heartbeat signal
- When the primary fails, cloud infrastructure automatically triggers failover



# By migrating to Managed Vertex Indirect Tax SaaS, you can focus on



## **Application excellence**

Automates the non-core tasks so your team can drive more impact



## **Increasing velocity**

Unlocks fast development, as-needed scale, and seamless integrations



## **Reducing risk**

Built-in expertise guarantees secure, up-to-date, and available workloads

# Key benefits of Managed Vertex Indirect Tax SaaS



Performance  
and scale



Security and  
compliance



Reliability and  
availability



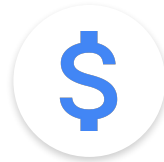
Full  
integration



Compatibility



Simple and  
fully managed



Predictable Costs

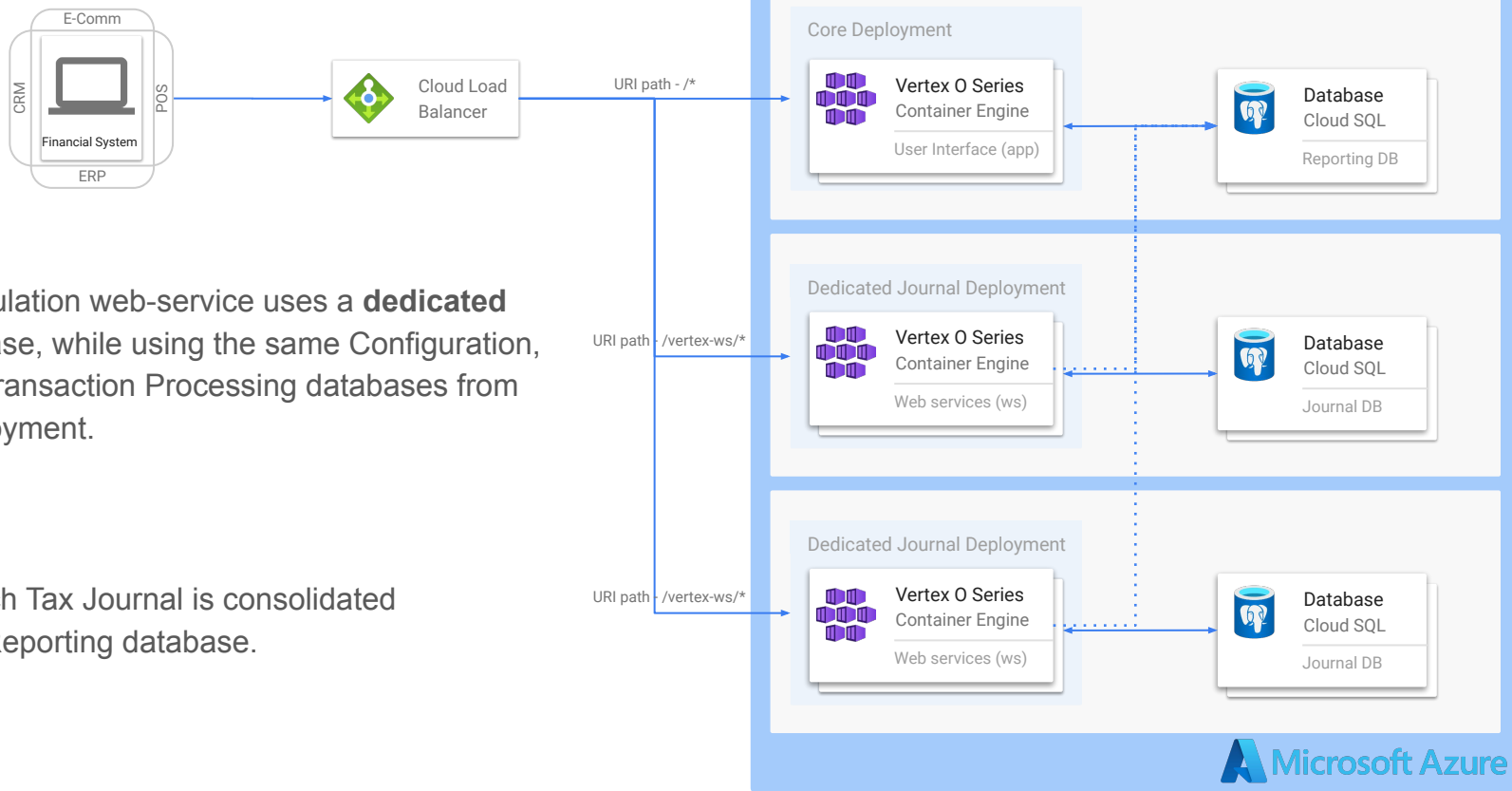


Partnerships



# Managed Vertex<sup>®</sup> Indirect Tax SaaS

Azure region - (US) East US



Each tax calculation web-service uses a **dedicated** journal database, while using the same Configuration, TaxGIS and Transaction Processing databases from the core deployment.

Data from each Tax Journal is consolidated into a single Reporting database.

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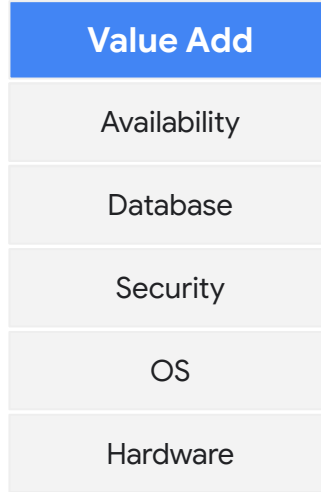
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You

