

Nite Ize Scales Tax Processes in Oracle and Adobe with Vertex



Company Profile

Nite Ize designs and manufactures inventor-driven products that organize your life, protect your gear, light your way, and creatively solve your everyday problems. Their 600+ products span across mobile, hardware, illumination, bike, fitness, and pets. They sell direct to consumer, direct to store, and through distributors. They have over 200 employees and serve more than 1,500 customers each year.

The experts involved in the Nite Ize implementation were:

- Jenna Scheeler, VP of People and Process at Nite Ize
- Scott Denison, Manager of Information Systems and Business Excellence at Nite Ize
- Chris Cafarelli, Oracle Practice Leader, Vertex Consulting
- Bill Flanigan, Product Manager – Oracle and NetSuite Connectors, Vertex

The Challenge

Nite Ize generates 1.2MM lines of data across 100,000 invoices annually in the U.S. The major challenges they encountered in calculating sales tax included:

- **Disparate financial and ERP systems:** They utilize Oracle Cloud ERP, Oracle Fusion Order Management, and Accounts Receivable. They also utilize Adobe Commerce on their website to take orders from customers. Adobe Commerce didn't integrate fully with their existing financial systems.
- **Manual processes:** As a result of disparate financial systems, their AR team had to manually adjust their transactions and add the tax in later. It became difficult for them to keep up with the transaction volume as it grew. This led to delayed invoices and delayed revenue.
- **Complexity for B2B and B2C:** The ability to manage tax accurately became even more complex for Nite Ize when accounting for both B2B and B2C models. They needed a solution that was flexible enough to handle both.
- **Support for long-term growth:** "We were hitting nexus in more and more U.S. states. The monthly tax reconciliation process had become a pretty large burden within our finance team due to the manual processes that we had in place. It was not a very sustainable process long-term and ultimately, we were looking for a solution that would support flexibility as our business grows," said Scheeler.
- **Cost efficiency:** They needed to be able to know the true cost of ownership of their technology. Because of their high transaction volume, they did not want to pay for every tax engine call for estimate and invoice, but instead wanted a model that was going to be easier to budget for.
- **Tight deadline to implement:** A speedy implementation for any new technology was of the utmost importance. Scheeler explains, "We had a really tight deadline for migration to avoid disrupting our business. Our contract with our current tax engine provider was ending shortly so it was critical that we got the migration to Vertex right. There was no turning back so, having an implementation partner that was willing to stick by the dates and ensure us a successful implementation was really important".

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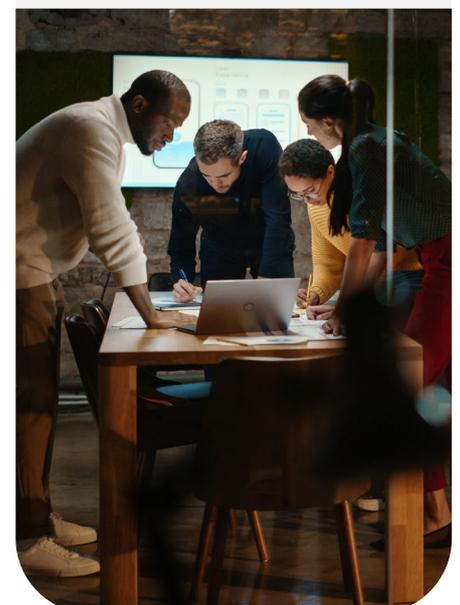
- Manufacturing
- Headquartered in Boulder, CO – USA
- \$150+ million in revenue

Vertex Solutions:

- Vertex O Series with 2 connectors:
 - Vertex Accelerator for Oracle Cloud ERP
 - Vertex for Adobe Commerce
- Vertex Consulting Services

IT Systems:

- ERP: Oracle Cloud
- E-commerce: Adobe Commerce



The Solution

Vertex O Series and Vertex Accelerator for Oracle Cloud ERP: Nite Ize implemented the Vertex O Series tax engine and the Vertex Accelerator for Oracle Cloud ERP, which was designed with the specific purpose of enhancing Oracle Cloud ERP environments. This solution is intended to optimize the capabilities of the Vertex O Series tax engine by making full use of its features. Through the implementation of the Vertex Accelerator, all the necessary data from the Oracle Cloud ERP application was integrated with the Vertex O Series tax engine, resulting in improved accuracy of sales and use tax calculation. Ultimately, the implementation of the Vertex Accelerator led to accelerated returns and maximized the return on investment for both Vertex and Oracle systems.

Vertex for Adobe Commerce: Nite Ize connected that same Vertex O Series tax engine to their Adobe Commerce e-commerce platform. By doing so, the tax content is updated in the Vertex O Series tax engine and leveraged across tax calculations in Oracle as well as the Adobe Commerce platform. Vertex enabled the Adobe Commerce cloud migration in two ways:

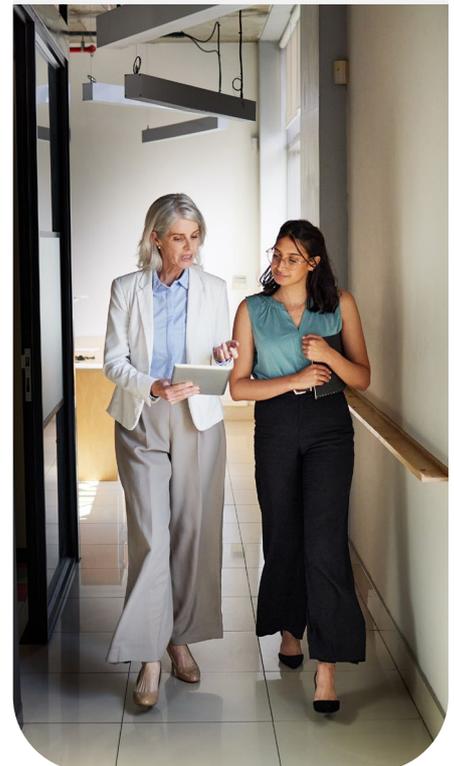
- 1. Tax Calculation and Order Capture in Adobe Commerce:** The Vertex connector for Adobe Commerce is an approved application in the Adobe Commerce ecosystem. Nite Ize licensed Vertex's Adobe Commerce connector, allowing them to simply disable their existing tax plug-in and enable the Vertex Commerce Cloud connector. The flexibility of the Vertex O Series tax engine as well as its ability to consume multiple attributes in the tax calculation inputs allowed Nite Ize's existing tax setups in Adobe Commerce to more accurately calculate tax in Adobe Commerce. All changes were made during the integration within the Vertex O Series applications, avoiding any disruption to Commerce Cloud operations.
- 2. Customer Invoicing and Receivables in Oracle ERP Cloud:** Nite Ize had an existing data feed between Adobe Commerce and Oracle ERP Cloud. This feed could not be altered without significant Oracle rework by Nite Ize as well as user training. The capability and flexibility of both the Vertex Accelerator for Oracle ERP Cloud and the Vertex O Series tax engine allowed all changes to be made in the tax integration layer. This allowed Nite Ize's business to continue to run uninterrupted while achieving more accurate and automated tax outcomes within Oracle Receivables.

Vertex Consulting Services: In order to achieve their rapid implementation goal, Vertex Consulting (VC) helped Nite Ize focus on the critical elements in each system. With VC's deep experience in Oracle environments and retail ecosystems, they connected all the technology for a seamless tax calculation process. Additionally, VC was able to deliver expanded scope within budget and timelines to allow for Nite Ize to have common business practices across all their in-market geographies.

More about the Vertex Accelerator from Flanigan, "We have features to complement the automation and scalability facets of a partner integration. This year we spent a lot of time revisiting the architecture of our solutions to account for customers that are scaling at an expedited rate. We also released features that greatly improve the performance of our partner integration thereby solidifying our position with businesses of all sizes. Finally, we are introducing a push-button experience that reduces the manual, error-prone processes of establishing that integration and upgrading to an automated, seamless experience for our customers, thereby fully delivering an integrated experience".

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Bill Flanigan
Product Manager – Oracle and NetSuite Connectors, Vertex



The Results

By collaborating with Vertex Consulting, Nite Ize was able to implement Vertex very quickly, gaining the following results:

- **Speedy implementation:** Experts in Vertex Consulting were able to complete the implementation project in just three months for Oracle Cloud Receivables and Order Management integrations for the U.S. as well as the implementation for their Adobe Commerce connector. Additionally, not only were they able to achieve implementation in a short time frame, but they were able to expand the scope of the project to Canada as well. "Vertex owned the implementation, so we didn't have to vet out a third-party and ensure that they were well-versed in Adobe Commerce, Oracle Order Management, and Oracle Fusion Financials", confirmed Scheeler.
- **One source of truth for tax consistency:** Denison explains, "From the technical side, one of the things that I was most surprised about was not having to go and update all of my address locations and every city, county, state combination in the database itself. It was a big weight off of my shoulders. The integration was seamless, not only with the Oracle ERP but across all three of the points – Adobe Commerce, Oracle Order Management, and Oracle Account Receivable – they were all recalling the same information. There was consistency across all systems which was really important".
- **Reduced manual work:** The Nite Ize team is more confident in the accuracy of the tax calculation. They can see not only the amount, but the full breakout and tax details that make up the calculation. They also save time by not having to conduct tax research and update source systems, and they're able to do more address cleaning or augmentation to improve accuracy.
- **B2B and B2C capabilities:** Vertex supports Nite Ize transactions whether they are through a B2B or B2C model. This was achieved by utilizing Oracle and Adobe Commerce attributes beyond product and customer information during the tax calculation.
- **Long-term growth:** The flexibility and scalability of the Vertex O Series tax engine easily supports Nite Ize in their business growth whether they increase product lines, expand into new markets, acquire other companies, or add new sales channels. They can merely update their O Series configurations and/or add new connectors when needed. This contributed to more efficiency tax and IT resource management.
- **Dedicated customer support:** Not only does the Vertex support team understand the technology, but they also understand the functional tax world which is just as complicated. Anytime Nite Ize runs into any issue, Vertex Support is able to address it and provide a quick solution. "We had a couple of niche scenarios that came up and the changes we needed were made within hours. Vertex has just an unbelievable turn-around time. With that, it really eased the burden not only on my own team but also our financial team", said Scheeler.

For advice to other organizations considering Vertex for their tax needs, Scheeler advises "It's important to know who you will be working with to ensure you will be getting the support you need – are they dedicated, are they knowledgeable, and can they respond quickly? For us, Vertex exceeded these expectations."

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Jenna Scheeler
VP of People and Process
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To learn more about Vertex solution for Oracle, visit: www.vertexinc.com/partners/oracle.

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