



TRENGTHS | CAPABILITIES | BENEFITS | MARKET TRENDS | TECHNOLOGIES | SOLUTIONS

	\$ 3,215.00	\$ 2,015.00	\$ 2,059.98	\$ 56.66	\$ 2.1
111 Distribution box, recessed PVC	\$ 5,362.00	\$ 3,654.00	\$ 201.38	\$ 86.35	\$ 11.2
Switch cover for water heater	\$ 1,230.00	\$ 9,652.00	\$11,254.00	\$ 15.65	\$ 3
Switch cover for AC units	\$ 1,600.00	\$ 2,312.00	\$ 320.65	\$ 33.21	\$ 1
Switch lighting switch, One way, one gang switch (51)	\$ 1,254.00	\$ 1,035.00	\$ 102.36	\$ 16.91	\$ 5
Water proof switch (50), 2 A	\$ 90.00	\$ 62.50	\$ 45.83	\$ 4.29	\$ 4
Water proof switch (50), 2 A	\$ 95.00	\$ 62.14	\$ 37.50	\$ 3.69	\$ 4
Waterproof distribution frame (DF), 100 pairs	\$ 359.00	\$ 315.00	\$ 332.66	\$ -	\$ 33
Weather switch w/ 2 A weatherproof	\$ 600.00	\$ 556.00	\$ 514.28	\$ 7.89	\$ 52
Weather switch w/ 2 A weatherproof	\$ 152.00	\$ 635.00	\$ 698.87	\$ 99.69	\$ 798
Weather switch w/ capacity for 30 wire connection with power	\$ 640.00	\$ 125.00	\$ 123.86	\$ 47.58	\$ 171
Weather switch w/ capacity for 30 wire connection with power	\$ 352.00	\$ 309.00	\$ 386.89	\$ 8.88	\$ 395
Weather switch w/ capacity for 30 wire connection with power	\$ 300.00	\$ 285.00	\$ 250.21	\$ 54.64	\$ 304
Weather switch w/ capacity for 30 wire connection with power	\$ 200.00	\$ 123.00	\$ 225.00	\$ 20.20	\$ 245
Weather switch w/ capacity for 30 wire connection with power	\$ 368.00	\$ 325.00	\$ 196.00	\$ 12.56	\$ 208
Weather switch w/ capacity for 30 wire connection with power	\$ 453.00	\$ 130.20	\$ 129.76	\$ 16.85	\$ 146
Weather switch w/ capacity for 30 wire connection with power	\$ 631.00	\$ 50.30	\$ 50.23	\$ 18.60	\$ 68
Weather switch w/ capacity for 30 wire connection with power	\$ 860.00	\$ 445.60	\$ 454.00	\$ 23.87	\$ 477



# SAPinsider 2024 Buyer's Guide

# Finance Management

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**Transitioning to SAP S/4HANA is not just a technological upgrade but a strategic imperative that reshapes every aspect of finance functions.**

## Exploring the Future of Finance in SAP

**B**usinesses are constantly searching for upgrades to their financial systems to improve their bottom line and promote innovation. The economy is rapidly changing, and organizations are beginning to realize that financial transformation is an essential step they must take in order to remain competitive and innovate. Additionally, with finance leaders now embracing more strategic roles for guiding their organizations, their roles have evolved beyond their conventional back-office responsibilities. They are tasked with more strategic roles in steering modern organizations.

To help SAP users make some of these critical decisions, SAPinsider put together this Buyers Guide, which aims to explore the challenges, opportunities and trends in the SAP financial management space and to highlight key vendors and partners. The vendor capability assessments are intended to aid and assist finance professionals in selecting the most suitable solutions for their needs. The participating organizations offer technology and consulting services that enhance the financial capabilities of SAP organizations, enabling them to manage cash and payments, enact core accounting processes, minimize tax burden, perform financial close activities,

remain compliant, and make long-term plans to secure their financial future.

### Challenges and Opportunities

For the 60-70% finance teams in SAP organizations running SAP ECC, transitioning to SAP S/4HANA is not just a technological upgrade but a strategic imperative that reshapes every aspect of finance functions. This move is essential for enhancing process efficiency, gaining real-time insights, and fostering data-driven decision-making, demonstrating why the move SAP S/4HANA is the top driving force among finance leaders.

To effectively navigate this transition, finance leaders are increasingly relying on SAP partners for both technology solutions and consulting services to accelerate time to value. These partners play a critical role in enabling organizations to leverage the full potential of SAP S/4HANA. They provide the necessary expertise, tools, and strategies to ensure a smooth and successful migration.

Large enterprises typically have ample resources to pursue intelligent and sustainable operations, and certified SAP partners offer advanced solutions and consulting to drive their

strategic vision across a diverse and global footprint. However, for mid-market and smaller firms, the challenges are more pronounced. These organizations not only face the realities of aging systems, but also operate with limited budgets and resources. For such organizations, SAP partners play a crucial role. They offer cost-effective and scalable solutions, and provide expert guidance, helping these organizations effectively navigate the challenges that face high-growth organizations.

As the end of maintenance for older SAP systems looms in 2027, the role of SAP partners becomes even more pivotal. They assist organizations in maintaining compliance and preparing for both internal SAP audits and external regulatory audits without the direct support from SAP. This involves not just technology upgrades, but also strategic planning, process optimization, and change management — areas where consulting partners provide invaluable expertise.

### Enhanced Insights for Strategic Finance

The demand for insights is one of the key drivers for finance professionals. Executives increasingly require real-time information from finance to guide their decision-making processes. The *SAP S/4HANA Finance and Central Finance: State of the Market 2023* research report confirms this shift, with 38% of respondent organizations citing the need for improved reporting, planning, and insights from finance as the top factor influencing their adoption of SAP S/4HANA for Finance.

Access to accurate and real-time information is critical in establishing a data-driven decision-making framework. Many finance leaders and their teams, however, still face challenges due to the lack of robust tools needed to effectively support executive decision-making in complex operating environments. Organizations must leverage intelligent financial reporting to support this demand from executives. Self-service

access to real-time multi-dimensional data allows businesses to respond quickly to insights presented by reports, offering a more agile approach to decision-making.

However, achieving enhanced insights requires more than just advanced software; it necessitates a synergy of technology and expert guidance. This is where SAP partners, both in technology and consulting, play a crucial role. These partners bring specialized expertise and tools that enable organizations to maximize the capabilities of SAP S/4HANA for Finance.

SAP technology partners provide the essential software and tools that integrate seamlessly with SAP systems, enhancing data analytics and reporting capabilities.

Moreover, SAP consulting partners are instrumental in guiding organizations through the complexities of implementing and optimizing these technologies. They offer strategic planning, best practices, and tailored solutions to ensure that financial teams can effectively utilize SAP S/4HANA for their specific needs. This support is crucial for organizations that may lack in-house expertise or resources to fully leverage their SAP investments. By collaborating with SAP partners, organizations gain a comprehensive solution — combining cutting-edge technology with expert insights.

### Optimizing Financial Management Through Intelligent Automation

Finance leaders face mounting pressure to leverage new digital technologies, particularly AI-driven automation, to enhance financial performance, cut costs, and reduce financial risks. This shift towards intelligent automation, especially in key processes like inter-company transactions, invoicing, payments, and period-end closing, is transforming the financial management landscape.

Within the SAP ecosystem, automation has emerged as a cornerstone for efficient financial management. SAP

38%

**Demand for improved reporting, planning and insights from finance.**

32%

**Pressure to reduce the cost and complexity of financial processes.**

**AI brings a layer of smart decision-making, predictive analysis, and enhanced efficiency to routine tasks.**

S/4HANA and the SAP Business Technology Platform are at the forefront of this change, enabling intelligent automation deployment that incorporates artificial intelligence (AI) across various finance and accounting processes. AI brings a layer of smart decision-making, predictive analysis, and enhanced efficiency to routine tasks. SAP recently announced the launch of SAP AI copilot Joule to further enable this approach.

Automation is most effective when strategically applied to areas with the highest potential impact. Many leading organizations are focusing on enhancing cash management, treasury, group reporting, and intercompany reconciliation through cloud-based intelligent automation with the primary goal of boosting financial closing efficiency. By concentrating on these areas, companies can maximize the benefits of automation and improve overall financial performance and agility.

### **Roadmap**

Organizations often adopt new technologies to claim they possess them, not necessarily because they are needed or beneficial. In the case of SAP S/4HANA, some organizations may simply be transitioning from SAP ECC because they feel they have no other option. Such enterprises are missing a vital opportunity to maximize the value of their SAP investment and bolster essential processes throughout their organization.

The first step companies should take when addressing their financial management needs is to lay out a roadmap. They should collaborate with key stakeholders from finance and IT teams to set clear goals, assess current processes, and pinpoint prime areas for automation. Aligning digital transformation initiatives with the organization's strategic objectives and committing to ongoing improvement by regularly revisiting and refining the roadmap is paramount. This focused approach will enable a seamless shift to cloud-based and intelligent automation, boosting

operational efficiency, lowering costs, and promoting data-driven decision-making.

### **Simplify and Centralize**

Amid financial instability across the world, companies are under tremendous pressure to reduce costs and make financial information more accessible. When choosing a partner to achieve financial management initiatives, companies should look for organizations that will help them to simplify their financial processes.

The pressure to reduce the cost and complexities of financial processes is the second-most referenced driver of SAP S/4HANA deployment, at 32%. To operate in a more streamlined and efficient way, finance professionals want clean and harmonized master data, efficient preprocessing and mapping of master data, the Universal Journal (single point of truth for financial data), and more flexible billing and revenue management.

Simplifying and streamlining financial landscapes not only helps SAP users work more efficiently, but it can also make it easier for them to deliver real-time visibility into finance and operations.

### **Key considerations**

It can be overwhelming to sift through the litany of SAP-related solutions and service providers. For many organizations, the most important consideration to make is the service provider's level of certification and affiliation with SAP.

- Are they a solution extension?
- Are they a certified SAP solution?
- Are they an SAP partner?
- Have they won a Pinnacle award?

Beyond certifications, organizations should also consider how a particular partner aligns with their overall environment and landscape. Both SAP and non-SAP landscape alignment and integration are critical.



## Compliance

Though improved insights and greater efficiency are often the most sought-after results from financial management changes, organizations must also take compliance into consideration. Remaining compliant with all applicable regulations is growing increasingly difficult, though. Laws around taxation and reporting are constantly in flux, and companies are constantly merging and acquiring other businesses, expanding into new jurisdictions.

Finance professionals should ensure that any solutions they consider not only allow them to meet their current compliance requirements, but also any future needs that may be on the horizon. Many SAP users are turning to digital taxation strategies that meet product taxability requirements in real-time. This capability is beneficial for achieving compliance, taking advantage of new business models, and pursuing product-related innovation.

## Finance Trends

A slate of new platforms and technologies have provided finance and accounting teams with the opportunity to replace, enhance, or overhaul outdated processes. If done properly, this can lead to signifi-

cant improvements in efficiency, accuracy, and decision-making. Below are some of the new opportunities:

**Leverage SAP BTP:** SAP's Business Technology Platform (BTP) enables companies to maximize their investment in SAP. Leading organizations are utilizing these capabilities to build, extend, and integrate intelligent automation solutions into their F&A processes. With SAP's focus on cloud-based innovation, SAP BTP will only become more essential.

**Automation overhauls F&A:** Finance and accounting is a leading area where organizations are deploying automation tools. In the F&A space, automation allows for streamlined operations, enhanced efficiency, and more innovation. By automating manual tasks, companies reduce the risk of errors and free up finance teams to spend their time on other vital tasks.

**Enhance Processes with the Cloud:** Organizations are enhancing processes like group reporting and intercompany reconciliation with cloud-based intelligent automation capabilities. This allows them to perform financial close activities more efficiently.

**SAP S/4HANA can act as a single source of truth, providing all users with accurate data to reduce the possibility of errors in the tax management process.**

**Advanced Analytics and Reporting:**

Companies are turning to advanced analytics as one of the most powerful tools in their audit defense arsenal. Tools like SAP Analytics Cloud can aid in visualizing finance data, identifying trends, and spotting anomalies that could trigger audits or penalties.

**Leverage SAP GL for more efficient processing:** SAP General Ledger provides workflows that allow for more efficient processing of input documents such as invoices, orders, vendors, customers across multiple segments, and sub-ledgers. Many organizations use these capabilities to enhance core accounting processes.

**Establish a Continuous Close:** Leading organizations are working to implement a long-term goal of a continuous close, which predicts rather than reacts to changes, providing timing and sequencing that is tied to organizational objectives rather than the traditional calendar. This kind of flexibility and control over the close process creates opportunities for faster and more accurate reporting, which leads to reduced costs and improved operational efficiency.

**Tax Management Trends**

Tax management teams are under pressure to deliver enhanced data reporting capabilities while also keeping pace with the ever-changing tax regulation landscape. Many companies are relying on new technologies and solutions to remain compliant and minimize their tax burden. Below are a few technologies and solutions that companies are using:

**The Shift to Digital Tax Reporting:**

Companies are under pressure from auditors to supply granular data for reporting and transparency throughout their finances. Tax teams are implementing solutions that provide them with real-time data to meet these demands.

**Using SAP S/4HANA to Minimize**

**Errors:** Manual processing can lead to errors that many companies simply

cannot afford to make. SAP S/4HANA can act as a single source of truth, providing all users with accurate data to reduce the possibility of errors in the tax management process.

**Simplify Document Extraction:** Sifting through spreadsheets or actual sheets of paper is time-consuming, inefficient, and can lead to errors. Companies now utilize automated document extraction tools to access any important data they need.

**Prepare for Mergers, Acquisition, and**

**Expansion:** Within the economic volatility of recent years, many organizations have found opportunities. Enterprises have expanded across borders, merged with competitors, and acquired other companies. These scenarios all present unique challenges for tax teams. Leading organizations leverage the capabilities of SAP S/4HANA to ensure that their tax management strategies are agile and flexible enough to accommodate any shake-ups, even ones that have not been specifically planned yet.

**Reduce Indirect Tax Complexity:** Tax teams must contend with complex and ever-evolving indirect tax challenges. Many rely on cloud-based, third-party software providers that allow the integration of global tax engines with tax determination capabilities.

**Streamline Data Management:** Companies need seamless data management across their Order-to-Cash (O2C), Procure-to-Pay (P2P), and Record-to-Report (R2R) flows. One of the most common ways they achieve this is through Artificial Intelligence and Machine Learning. When used alongside SAP S/4HANA, companies can ensure compliance and increase efficiency in these essential functions.

**Cash Management Trends**

Shifting priorities for consumers and global economic uncertainty has made cash management increasingly difficult in recent years. Organizations need reliable cash management and treasury

**Real-time data gives companies visibility into their cash position at any given moment and helps them to make more informed decisions about how to best deploy their resources.**

strategies to position themselves for future success. Below are some of the trends that are defining the current moment in cash management.

**End-to-End Straight-Through Payment Processing:** To support the increased demand for visibility, many organizations are implementing End-to-End Straight-Through processing for all their payments. This not only improves transparency, but also reduces errors and speeds up processing by forcing organizations to connect previously siloed systems.

**Integrate Cash Management with ERP:** The responsibility for cash management is often spread across multiple departments within an organization and its different systems. By moving cash management into SAP S/4HANA, users can access a centralized view of cash balances and transactions throughout the entire enterprise.

**Fraud Detection:** With multiple opportunities for fraud, outgoing payments represent a significant concern for finance departments. Most SAP users are turning to fraud detection solutions that can identify suspicious activity. Beyond preventing theft, this can also boost the confidence that customers have in a company.

**Real-time Data:** Real-time data gives companies visibility into their cash position at any given moment and helps them to make more informed decisions about how to best deploy their resources. Working towards real-time data functionality can also force companies to improve their processes. Companies may need to streamline AP/AR processes or re-evaluate order and inventory management processes to realize the full benefits of real-time data.

**Automate Essential Functions:** Organizations are increasingly investing in automation solutions for cash management and treasury processes like billing and revenue management, Accounts Payable, purchase orders, and more.

This reduces the likelihood of errors and frees up finance team members to work on activities that add value.

**Approach Forecasting Holistically:** Business leaders are under more pressure than ever to provide accurate forecasts amid economic turbulence. A lack of visibility is one of the key roadblocks in their way. SAP S/4HANA allows finance leaders with enhanced tools like predictive accounting, enhanced data architecture, and user interface for reporting and monitoring cash to reduce forecasting complexity and improve outcomes.

**Upskilling the current workforce:** Though a lack of proper solutions can impede cash visibility, having a workforce that is unable to use such tools can pose just as large of an issue. Companies investing in cash management tools are also taking the time to ensure that their employees can maximize the value of these tools.

### Tips For Buyers

Finance teams and other stakeholders should consider the below mentioned factors when deciding on upcoming strategic investments.

- **Demand real-time data and analytics.** Having access to real-time data is no longer optional. Decision-makers risk being left behind without up-to-the-minute information. Finance teams should focus on building end-to-end visibility across cash management functions, workflows, and processes, applying integrated solutions to connect cash management and accounting for faster access to high quality data.
- **Prioritize automation investments.** The current business landscape can feel like an AI and automation gold rush. While companies can leverage automation tools as much as they can. However, companies should step back and perform an audit of their current SAP landscape and the growing list of automated solutions before making

**Teams can use intelligent ERP finance and accounting system in SAP S/4HANA to achieve visibility and develop a single source of truth.**

any decisions. Prioritize high-impact processes and functions for automation investment like Financial Planning and Analysis (FP&A), payment processing, and financial close.

- **Evaluate risk on the customer side.** Though many organizations evaluate their own internal risk in terms of fraud vulnerabilities and tax burden, there are risks on the customer side as well. Organizations should invest in data that allows them to better understand their customers' behavior so they can position themselves appropriately.
- **Use the move to SAP S/4HANA as an opportunity.** A lack of visibility is one of the most common issues that finance teams face. Teams can use intelligent ERP finance and accounting system in SAP S/4HANA to achieve visibility and develop a single source of truth instead of overhauling individual systems.
- **Boost your business with cloud-based analytics.** SAP has indicated that it will focus on cloud-based innovation going forward, so organizations with the option to move to a cloud-based or hybrid model can benefit from doing so. SAP also offers tools like SAP Data Intelligence Cloud and SAP Analytics Cloud to process, analyze, store, and visualize data across the organization.

- **Don't rely on IT for tax solutions.**

Global tax management is increasingly becoming complex with a litany of new regulations and requirements. SAP organizations should align tax strategies with ongoing enterprise transformation initiatives and ensure that financial transformation and tax management are developed in lockstep; however, tax experts and not IT should oversee this process as they will have a better understanding of what outcomes they need.

- **Find certified solutions.** SAP organizations benefit from leveraging third-party solutions built with SAP users in mind. Many companies have developed solutions built on SAP BTP that are designed to integrate seamlessly with SAP S/4HANA. These solutions SAP certified and help reduce the frustrations that can come with integration.



# How BlackLine Lowers Risk and Increases Agility



## About BlackLine

BlackLine offers SAP solution extensions that help companies move to modern accounting by unifying processes, automating repetitive work, and driving accountability through visibility. SAP solution extensions from BlackLine seamlessly integrate with SAP and free accounting teams to focus on what matters most by addressing processes like balance sheet substantiation, journal entry management, and intercompany accounting. For more information, visit <http://www.blackline.com/sap/>

## Solution Portfolio

SAP Financial Close Solutions, SAP Intercompany Governance, BlackLine Smart Close

## Solution Roadmap

In 2024, BlackLine plans to introduce the BlackLine Accounting Studio, a new orchestration layer providing transparency, control and automation across end-to-end accounting processes. Additionally, the roadmap includes AI-powered automated risk assessments by account, chatbots to offer in-app help to users, and other intelligent features.

## Differentiators

- Companies can manage and automate end-to-end accounting processes with out-of-the box leading practice capabilities for high-volume transaction matching, automated journal entries, and account substantiation.
- Integrated, cloud-based platform with an intuitive user interface that allows role-based reporting, dashboards, and segregation of duties, including auditor options.
- BlackLine offers the only SAP solution extensions for the financial close. The solutions are ERP agnostic and used by 4,300 customers, including 1,300 running SAP.
- BlackLine has received numerous awards including the 2021 G2 Best Products for Finance, the 2020 Gartner Peer Insights Customers' Choice for Cloud Financial Close Solutions, and 2021 Top-Rated Award in the Financial Close Category from TrustRadius to name a few.

## Value Outcomes

- Users have an average ROI of 474% with a break-even point that occurs in only eight months.
- There is a 50% decrease in FX exposure and 96% reduction in intercompany variances.
- Companies spend 50% less time on audits
- Companies experience up to a 70% decrease in days to close through streamlined accounting processes, such as automated journal entries and account reconciliations.
- Users save 2.6x work performed without new headcount and enable scalability of accounting processes.

## Use Case Example

**Customer:** Finning International provides parts and services for equipment and engines to customers in various industries.

**Challenge:** Finning's Accounting and Finance organization relied on tools that weren't designed to effectively manage the month-end close. The team wanted a more centralized, automated close solution and users questioned why reconciliations couldn't just be performed in the company's existing SAP ERP.

**Solution:** Finning leadership partnered with BlackLine and implemented BlackLine's Financial Close Management solution. It currently utilizes BlackLine's Account Reconciliations, Transaction Matching, Journal Entry, and Task Management solutions.

### Results:

- BlackLine enabled the business to gain visibility into the month-end close and to make process changes, reducing closing time by 50%.
- Through BlackLine's Transaction Matching solution, transactions are automatically matched in minutes within BlackLine.
- Automated transaction matching, along with auto certification of account reconciliations, enabled staff to focus on more strategic activities.
- 40% of accounts are auto-certified each close, which greatly reduces manual account substantiation efforts and allows more time for improving the quality of information.
- Previous close processes lacked standardization, a major challenge for an organization using multiple ERPs.
- Finning no longer had to rely on Share-Point during the close and store account information in multiple repositories.

# Integrating and Securing Payments with Delego



## About Delego

Delego helps world-leading companies expand their payment acceptance capabilities by seamlessly integrating and securing their payments ecosystem with SAP while offering in-house payment processing to provide merchants with lower processing rates. Learn more at <https://www.delegopayments.com>

## Solution Portfolio

SAP Payments Integration, Data Security, eCommerce Integration, Accounts Receivable, Customer Portal

## Solution Roadmap

In the upcoming year, Delego will focus on adding more functionality for SAP users around automating the accounts receivable process further, with new features such as:

- Enabling SAP users to send simple on click payment requests to customers for easy collection.
- Providing customers peace of mind by allowing them to sign up for automatic recurring payments.
- Reducing collection efforts with multiple scheduled invoice reminders sent at different intervals based on the age of the invoice.

## Differentiators

From accepting payments on an eCommerce webstore or processing payments from a call center, to enabling customers to make payments on a secure customer portal, Delego offers payment solutions for SAP users at all points of the payment cycle. Unlike other payment integration providers that require multiple parties to process payments, Delego offers a full first-party payment processing experience for SAP users.

- **SAP Payments Integration:** Reduce risk and increase efficiency by integrating electronic payments securely with SAP.
- **Data Security:** Safeguard customer payment data and streamline PCI compliance.
- **eCommerce Integration:** Allow eCommerce businesses to reduce payment friction at checkout, and enable popular payment methods like digital wallets, to increase conversions, which helps increase revenue while securing cardholder data.
- **Accounts Receivable:** Reduce cash collection cycles by securely accepting electronic payments directly inside your SAP system.
- **Customer Portal:** Enable customers to manage payments with a simplified and secure customer self-service electronic invoicing and payment processing (EIPP) portal.

## Featured Solution

Delego offers Delego PayCenter, which is a simplified and secure customer self-service electronic invoicing and payment processing (EIPP) portal. Integrated seamlessly with SAP, the solution allows companies to accelerate collection cycles and reduce the time and cost spent managing, tracking, and collecting unpaid invoices by providing customers with a convenient, cloud-based, self-service portal to view and pay their invoices and access their transaction history.

Delego PayCenter features real-time SAP integration, which provides a unified experience to all users. It reads and uploads information to maintain critical account data. It allows customers to use both traditional payments like credit cards and ACH, as well as next-generation payments like digital wallets. The solution's functionality offers a streamlined experience for users and administrators alike. It works with over 50 process integrators — more than any other solution available.

With Delego PayCenter, users can:

- Accelerate order-to-cash cycle.
- Avoid customer confusion and 'source of truth' issues with real-time SAP integration.
- Improve cash flow management.
- Reduce time, resources and costs managing, tracking, and collecting unpaid invoices.
- Improve customer service and experience by providing quick and convenient ways to pay invoices.

# Implementing Analytics and Reporting with SimpleFi



## About SimpleFi

SimpleFi focuses on business process design, business content, automation, and implementing SAP Planning, Analytics and Consolidations solutions. Its top goal is 100% customer references. SimpleFi drives unparalleled value with the PlaniFi portfolio of pre-packaged SAP planning, analytics, and consolidation applications. Learn more at <https://simplefisolutions.com>

## Solution Portfolio

Consolidations, Sales and Margin Planning, Intercompany Planning, Sales Performance Management, HR Planning, and Capital Planning.

## Solution Roadmap

SimpleFi is announcing PlaniFi Cloud, a fully-managed platform with self-service reporting and financial statement forecasting. In 2024, existing PlaniFi applications will be released on the platform to enable self-service deployments. Roadmap areas include Consolidations 2.0, enhancing existing applications, new PaPM + SAP Analytics Cloud bill of material planning application, and integration support for new third-party applications.

## Differentiators

- SimpleFi offers business processes and technology for enterprise planning and consolidations, FP&A, reporting and analytics.
- It implements solutions leveraging SAP BTP (including SAP Analytics Cloud, Datasphere, PaPM) in addition to Group Reporting.
- It provides reporting and integration with SAP ECC 6, SAP S/4HANA Public Cloud or On-Premise, SAP SuccessFactors, SAP C4, and non-SAP systems.
- SAP Silver partner in the U.S. and Canada with customers in all major geographies and industries.
- SAP Hackathon award winners for Sales and Margin Planning (2019), Liquidity Planning (2022), and Sports Analytics (2023)

## Value Outcomes

- Decreases time and cost to deploy business planning, FP&A, and consolidations solutions by 30-50% by leveraging PlaniFi prepackaged applications
- Automates monthly management reporting and insights
- Shortens planning and close to report cycles
- Increases accountability

## Use Case Example

**Customer:** SumUp Inc. is a financial technology company that offers users a range of card readers and financial services like invoices, gift cards, payment links, and more.

**Challenge:** SumUp had always exported and merged trial balances in Excel, where the company performed currency translation and elimination entries. This situation was compounded when the company made multiple acquisitions over several years. Knowing their current processes were unsustainable, SumUp decided they wanted a stand-alone consolidations and reporting solution with quicker time to value in the immediate future.

**Solution:** SumUp partnered with SimpleFi to get an improved consolidation solution by leveraging SimpleFi's internally developed pre-packaged SAP Analytics Cloud (SAC) Consolidations content. SimpleFi could implement this solution for them in just over two months, as much of the prepackaged content met SumUp's requirements out of the box, with reporting and analysis tools are built into the solution.

**Results:** The design, build, and UAT were all completed in two months and under budget. SumUp is incredibly satisfied with the solution and pleasantly surprised with the training, knowledge transfer, and documentation that SimpleFi has provided so that SumUp can own and manage the solution themselves.

# Navigating an Increasingly Regulated World with Sovos

## SOVOS

### About Sovos

Sovos provides businesses with the confidence needed to navigate an increasingly regulated world. Offering a modern, IT driven response to compliance, Sovos' solutions are scalable, reliable, secure, and provide a great user experience. Sovos has more than 100,000 customers, including half the Fortune 500, as well as businesses of every size operating in more than 70 countries. The company's cloud-based solutions integrate with a wide variety of business applications and government compliance processes. Sovos has employees throughout the Americas and Europe and is owned by Hg and TA Associates. To learn more, visit <https://sovos.com>.

### Solution Portfolio

Sales & Use Tax, Value Added Tax, Tax Information Reporting, Shipping Compliance

### Solution Roadmap

Enhanced focus on usability and interoperability within product suite, continued response to ever-changing regulatory landscape and new automation tools to enhance interoperability between SAP and Sovos solutions.

### Differentiators

- Global compliance technology solutions and services provider.
- Simplifies tax determination for every transaction, regardless of jurisdiction.
- Multilingual regulatory experts monitor and interpret regulations worldwide, enabling faster and effortless sales tax filings.
- Ensures tax authorities receive accurate data in real-time, accurately and efficiently.
- Offers a comprehensive solution for e-invoicing compliance, including clearance, continuous transaction control and post-audit models across five continents.
- Augmented efficiency and minimized risk through automated statutory reporting obligations.
- Maximized time efficiency and accuracy for unclaimed property reporting.
- Mitigates compliance errors that could lead to risk fines, losses and delays to market.

### Value Outcomes

- Reduce compliance risk
- Automate manual compliance processes
- Reduces barriers to growth that come with geographic expansion and business transformation

### Use Case Example

**Customer Overview:** Louisville, Kentucky-based Brown-Forman is one of the largest spirits companies in the world. It owns brands such as Jack Daniels, Southern Comfort and Woodford Reserve. Brown-Forman distributes its products to over 160 countries worldwide.

**Challenge:** Brown-Forman aimed to expand its international presence. However, this goal placed considerable pressure on the company's IT team tasked with navigating the dynamically evolving financial regulations of countries such as Mexico and Brazil. The company needed real-time processing and responses to effectively oversee e-invoicing processes.

**Solution:** The Sovos team was able to seamlessly integrate its einvoice global solution for invoicing and e-accounting regional solutions into Brown-Forman's existing systems to ensure the compliance procedures met requirements. Brown-Forman now can manage multi-country compliance directly within its internal SAP system.

**Results:** Sovos invoicing and accounting solutions helped Brown-Forman simplify its compliance procedures in Mexico and Brazil, allowing the spirits distributor to reduce its human resource capital and technology investments.

# Mastering Tax Compliance with Vertex



## About Vertex

For over 25 years, Vertex and SAP have worked closely to drive innovation and better business outcomes for their 1,000+ joint customers. The partnership centers on the indirect tax needs and requirements of their mutual customers. Vertex is an SAP Silver Partner offering an Endorsed App for indirect tax determination that integrates seamlessly with SAP. SAP works with Vertex on co-innovation and early adoption because of its deep technology knowledge, expertise, and successful results with customers. Learn more at [www.vertexinc.com](http://www.vertexinc.com)

## Solution Portfolio

Vertex's end-to-end tax software portfolio encompasses tax determination, data and insight, and reporting and compliance. These include Vertex Accelerator, Vertex Chain Flow Accelerator, and Vertex PLUS Tools. Vertex works with SAP ECC 6, SAP S/4HANA, SAP S/4HANA Private Cloud, SAP S/4HANA Public Cloud, SAP Ariba, SAP Commerce Cloud, and SAP Concur Invoice.

## Differentiators

- Vertex removes manual, tax-driven IT config/code burden in SAP with simplified tax code set-up and automated and updated rates, determination content, and decision models.
- Vertex enhances tax team flexibility and enables pivot while the business scales.
- Solutions are designed to meet the highest standards of the SAP Integration and Certification Center (SAP ICC).
- SAP Pinnacle Awards 2022 Finalist

### Vertex Accelerator for SAP ERP

*Advanced integration and reporting tools for rapid deployments*

- Includes Tax Code & data mapping, detailed reports, conversions and more
- Uses SAP-Certified RFC integration for US and Canada (with SIC)

### Vertex Chain Flow Accelerator for SAP ERP

*Configurable logic for complex VAT transaction scenarios*

- SAP-Certified add-on that replaces native SAP ERP tax method
- Uses REST API integration with Vertex Tax Services and O Series

### Vertex PLUS Tools for SAP ERP

*Specialized solutions for solving common P2P, O2C, and Data challenges*

- Address AP Vendor reconciliations, test automation, tax credits and more
- Supports multiple geographies and indirect tax types

## Value Outcomes

Vertex solutions address the complexities of the broadest set of global businesses, commerce platforms, and B2B/B2C marketplaces:

- Multi-jurisdictions
- Multi-channel distribution
- Multiple transaction systems
- High transaction volumes

Modular capabilities supporting multiple end-to-end use cases:

- Tax Determination
- Compliance Reporting
- Tax Data Management
- Document Management

## Use Case Example

**Customer:** Lego is one of the world's largest and most well-known toy companies. It is in over 140 countries worldwide and we have over 17,000 employees.

**Challenge:** Lego wanted to ensure that customers did not pay an incorrect tax rate and that its e-commerce platform did not have downtime, especially around the holidays.

**Solution:** Lego implemented Vertex Light into its retail stores to capture and make easier the process of sales tax holidays, which had been a pain point for the toy company.

**Results:** Vertex Light helped Lego to operate more efficiently, giving its tax operations department more time to work on other processes. Lego also used the solution for the ecommerce platform to calculate sales tax rates, ensuring that sales tax holidays and sales tax rates are correct.

○ No Capability
◐ Minimal Capability
◑ Partial Capability
◒ Major Capability
● Full Capability

	GENERAL LEDGER JOURNAL ENTRY MANAGEMENT	PARALLEL LEDGERS MANAGEMENT	FLEXIBLE CHART OF ACCOUNTS	MULTI-CURRENCY SUPPORT AND EXCHANGE RATE UPDATES	AUTOMATED INTERCOMPANY TRANSACTIONS	REAL-TIME GENERAL LEDGER BALANCES VISIBILITY	FINANCIAL PERIOD SETTING AND CONTROL	AI / ML ENABLED CORE ACCOUNTING & GL PROCESS AUTOMATION	CLOUD-BASED CORE ACCOUNTING & GL SYSTEM
<b>Technology Vendors</b>									
Argano	●	●	●	●	●	●	●	●	●
Avalara	○	○	○	○	○	○	○	○	○
Avvale	●	●	●	●	●	●	●	◐	●
bioLock	○	○	○	○	○	○	○	○	○
BlackLine	●	◐	●	●	●	●	●	◐	●
Bramasol	●	●	●	●	●	●	●	●	●
Google Cloud	○	○	○	○	○	○	○	○	○
insightsoftware	●	●	●	●	●	●	●	◐	◐
Kyriba	○	○	○	○	○	○	○	○	○
Promenta	●	●	●	●	●	●	◐	◐	◐
SAP	●	●	●	●	●	●	●	◐	●
Serrala	●	○	○	◐	◐	○	○	○	○
Sovos Compliance	○	○	○	○	○	○	○	○	○
SimpleFi Solutions	○	○	●	●	○	●	○	○	○
Thomson Reuters ONESOURCE Direct Tax	◐	◐	◐	◐	◐	◐	◐	◐	◐
Thomson Reuters ONESOURCE Global Trade	◐	○	◐	●	○	○	○	○	◐
Thomson Reuters ONESOURCE Indirect Tax Determination	◐	○	◐	◐	◐	◐	○	◐	◐
Tipalti	◐	○	○	●	●	○	◐	●	◐
TJC Group	○	○	○	○	○	○	○	○	○
TruQua, an IBM Company	●	●	●	●	●	●	●	●	●
Verbella	◐	◐	◐	◐	◐	◐	◐	◐	◐
Vertex, Inc.	○	○	○	○	○	○	○	○	○
xSuite Group	○	○	○	○	○	○	○	○	○
<b>Consultants and Integrators</b>									
EY	●	●	●	●	●	●	●	●	●
Fresh FP&A, LLC	◐	◐	●	●	◐	◐	●	○	●
Kaar Technologies Inc.	●	●	●	●	●	●	●	◐	●
KPMG	●	●	●	●	●	●	●	●	●
msg global solutions	●	●	●	●	●	●	●	◐	◐
The Silicon Partners	●	●	●	●	●	●	●	◐	●
Syskoplan Reply	●	●	●	●	●	●	●	◐	●
YASH Technologies	●	●	◐	●	●	●	●	●	●

\*Vendors submitted their self-assessments via electronic survey, which were then validated by SAPinsider research analysts.

○ No Capability
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◒ Major Capability
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	AUTOMATED INVOICING AND BILLING	PAYMENT PROCESSING	DUNNING	CREDIT MEMOS	VENDOR AND CUSTOMER ACCOUNT MANAGEMENT	AI / ML ENABLED AR PROCESS AUTOMATION	CLOUD-BASED AR SYSTEM
<b>Technology Vendors</b>							
Argano	●	●	●	●	●	●	●
Avalara	○	○	○	○	○	○	○
Avvale	●	●	●	●	●	●	●
bioLock	○	○	○	○	○	○	○
BlackLine	◐	●	◑	◐	◐	◐	◑
Bramasol	●	●	●	●	●	●	●
Google Cloud	○	○	○	○	○	○	○
insightsoftware	◑	◑	◐	◑	●	◑	◐
Kyriba	○	○	○	○	○	○	○
Promenta	○	○	○	◑	●	◑	◑
SAP	●	●	●	●	●	◑	●
Serrala	◑	◑	●	◑	◑	●	○
Sovos Compliance	○	○	○	○	○	○	○
SimpleFi Solutions	○	○	○	○	◑	○	○
Thomson Reuters ONESOURCE Direct Tax	○	○	○	○	○	○	○
Thomson Reuters ONESOURCE Global Trade	◑	◑	○	◑	◑	○	◑
Thomson Reuters ONESOURCE Indirect Tax Determination	●	●	○	●	◑	◐	◑
Tipalti	○	○	○	○	○	○	○
TJC Group	○	○	○	○	○	○	○
TruQua, an IBM Company	●	●	●	●	●	●	●
Verbella	◑	◐	◐	◑	◑	◑	◐
Vertex, Inc.	●	○	◑	●	●	○	◑
xSuite Group	○	○	○	○	○	○	○
<b>Consultants and Integrators</b>							
EY	●	●	●	●	●	●	●
Fresh FP&A, LLC	○	●	◐	◑	◑	○	●
Kaar Technologies Inc.	●	●	●	●	●	◑	●
KPMG	●	●	●	●	●	●	●
msg global solutions	●	●	●	●	●	◑	◑
The Silicon Partners	●	●	●	●	●	◑	●
Syskoplan Reply	●	●	●	●	●	◑	●
YASH Technologies	●	●	◐	●	●	●	●

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	ELECTRONIC INVOICE PROCESSING	AUTOMATED PAYMENT SCHEDULING AND PROCESSING	DUPLICATE PAYMENT ALERTS	VENDOR MASTER DATA MANAGEMENT	INTEGRATION WITH PROCUREMENT SYSTEMS	EXPENSE ALLOCATION	AI / ML ENABLED AP PROCESS AUTOMATION	CLOUD-BASED AP SYSTEM
<b>Technology Vendors</b>								
Argano	●	●	●	●	●	●	●	●
Avalara	○	○	○	○	◑	○	○	○
Avvale	●	●	●	●	●	●	●	●
bioLock	○	○	○	○	○	○	○	○
BlackLine	◐	○	●	○	○	●	○	◐
Bramasol	●	●	●	●	●	●	●	●
Google Cloud	○	○	○	○	○	○	○	○
insightsoftware	◐	◑	◐	●	◐	◐	◑	◐
Kyriba	○	○	○	○	○	○	○	○
Promenta	●	●	◑	●	●	●	◑	◑
SAP	●	●	●	●	●	●	◑	●
Serrala	●	●	●	◐	●	●	●	●
Sovos Compliance	○	○	○	○	○	○	○	○
SimpleFi Solutions	○	○	○	○	○	●	○	○
Thomson Reuters ONESOURCE Direct Tax	○	○	○	○	○	○	○	○
Thomson Reuters ONESOURCE Global Trade	◐	◐	◐	◐	◐	◐	○	◐
Thomson Reuters ONESOURCE Indirect Tax Determination	◐	◐	○	◐	●	◐	◐	◐
Tipalti	●	●	●	●	●	●	●	●
TJC Group	◐	○	○	○	○	○	○	○
TruQua, an IBM Company	●	●	●	●	●	●	●	●
Verbella	◐	●	●	●	◐	●	●	●
Vertex, Inc.	◐	◐	○	●	◐	○	○	◐
xSuite Group	●	◐	◐	◐	◐	◐	◐	◐
<b>Consultants and Integrators</b>								
EY	●	●	●	●	●	●	●	●
Fresh FP&A, LLC	◐	◐	◐	◐	◐	◐	○	●
Kaar Technologies Inc.	●	●	●	●	●	●	◐	◐
KPMG	●	●	●	●	●	●	●	●
msg global solutions	●	●	●	●	◐	●	◐	◐
The Silicon Partners	●	●	●	●	●	●	◐	●
Syskoplan Reply	●	●	●	●	●	●	◐	●
YASH Technologies	●	●	●	●	●	●	●	●

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◒ Major Capability
● Full Capability

	AUTOMATED CONSOLIDATION WORKFLOW	CONSOLIDATED FINANCIAL STATEMENT PREPARATION	INTERCOMPANY RECONCILIATIONS	ELIMINATIONS	REGULATORY REPORTING	GROUP CURRENCY CONVERSION	AUTOMATED PERIOD-END CLOSING PROCESSES	AI / ML ENABLED FINANCIAL CONSOLIDATION & CLOSE PROCESS AUTOMATION	CLOUD-BASED FINANCIAL CONSOLIDATION & CLOSE SYSTEM
<b>Technology Vendors</b>									
Argano	●	●	●	●	●	●	●	●	●
Avalara	○	○	○	○	○	○	○	○	○
Avvale	●	●	●	●	●	●	●	●	●
bioLock	○	○	○	○	○	○	○	○	○
BlackLine	●	●	●	●	◑	●	●	◑	●
Bramasol	◑	◑	◑	◑	◑	◑	◑	◑	◑
Google Cloud	○	○	○	○	○	○	○	○	○
insightsoftware	◑	◑	◑	◑	◑	◑	◑	◑	◑
Kyriba	○	○	○	○	○	○	○	○	○
Promenta	◑	○	○	○	●	●	●	◑	◑
SAP	●	●	●	●	●	●	●	◑	●
Serrala	○	○	○	○	○	○	○	○	○
Sovos Compliance	○	○	○	○	●	○	○	○	○
SimpleFi Solutions	●	●	●	●	●	●	●	●	●
Thomson Reuters ONESOURCE Direct Tax	◑	◑	◑	○	◑	◑	◑	◑	◑
Thomson Reuters ONESOURCE Global Trade	○	○	○	○	○	○	○	○	○
Thomson Reuters ONESOURCE Indirect Tax Determination	○	○	○	○	○	○	○	○	○
Tipalti	◑	○	◑	○	◑	●	◑	◑	◑
TJC Group	○	○	○	○	◑	○	○	○	○
TruQua, an IBM Company	●	●	●	●	●	●	●	●	●
Verbella	◑	◑	◑	◑	◑	◑	◑	◑	◑
Vertex, Inc.	○	○	○	○	○	○	○	○	○
xSuite Group	○	○	○	○	○	○	○	○	○
<b>Consultants and Integrators</b>									
EY	●	●	●	●	●	●	●	●	●
Fresh FP&A, LLC	○	◑	◑	◑	◑	◑	○	○	●
Kaar Technologies Inc.	◑	●	●	●	◑	●	◑	◑	●
KPMG	●	●	●	●	●	●	●	●	●
msg global solutions	●	●	●	●	●	●	●	◑	◑
The Silicon Partners	●	●	●	●	●	●	●	◑	●
Syskoplan Reply	●	●	●	●	●	●	●	◑	●
YASH Technologies	●	●	●	●	●	●	●	●	●

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	BUDGETING	FORECASTING	SCENARIO PLANNING	VARIANCE ANALYSIS	PROFITABILITY ANALYSIS	COST CENTER ACCOUNTING	INTEGRATION WITH OTHER FINANCIAL AND OPERATIONAL SYSTEMS	AI / ML ENABLED FP&A PROCESS AUTOMATION	CLOUD-BASED FP&A SYSTEM
<b>Technology Vendors</b>									
Argano	●	●	●	●	●	●	●	●	●
Avalara	○	○	○	○	○	○	○	○	○
Avvale	●	●	●	●	●	●	●	●	●
bioLock	○	○	○	○	○	○	○	○	○
BlackLine	◐	○	○	●	◐	◑	◑	◑	◐
Bramasol	◑	◑	◑	◑	◑	◑	◑	◑	◑
Google Cloud	○	○	○	○	○	○	○	○	○
insightsoftware	●	●	●	●	●	●	●	◑	◑
Kyriba	○	○	○	○	○	○	○	○	○
Promenta	○	○	○	○	○	◑	◑	○	○
SAP	●	●	●	●	●	●	●	◑	●
Serrala	○	○	○	○	○	○	○	○	○
Sovos Compliance	○	○	○	○	○	○	○	○	○
SimpleFi Solutions	●	●	●	●	●	●	●	●	●
Thomson Reuters ONESOURCE Direct Tax	◑	◑	◑	◑	◑	◑	◑	◑	◑
Thomson Reuters ONESOURCE Global Trade	◑	◑	◑	○	○	◑	◑	○	◑
Thomson Reuters ONESOURCE Indirect Tax Determination	○	◑	◑	○	○	○	◑	◑	◑
Tipalti	◐	◐	◐	◐	◐	◑	●	◑	◑
TJC Group	○	○	○	○	○	○	○	○	○
TruQua, an IBM Company	●	●	●	●	●	●	●	●	●
Verbella	◑	◑	◑	◑	◑	◑	◑	◑	◑
Vertex, Inc.	○	○	○	○	○	○	○	○	○
xSuite Group	○	○	○	○	○	○	○	○	○
<b>Consultants and Integrators</b>									
EY	●	●	●	●	●	●	●	●	●
Fresh FP&A, LLC	◑	◑	◑	◑	◑	◑	●	○	●
Kaar Technologies Inc.	●	●	●	●	●	●	●	◑	●
KPMG	●	●	●	●	●	●	●	●	●
msg global solutions	●	●	●	●	●	●	●	◑	●
The Silicon Partners	●	●	●	●	●	●	●	◑	●
Syskoplan Reply	●	●	●	●	●	●	●	◑	●
YASH Technologies	●	●	●	●	●	●	●	●	●

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	CASH FLOW FORECASTING	MULTI-BANK ACCOUNT MANAGEMENT	LIQUIDITY PLANNING	BANK COMMUNICATION MANAGEMENT	ELECTRONIC BANK STATEMENT PROCESSING	AUTOMATED CASH POSITIONING	AI / ML ENABLED CASH MANAGEMENT & TREASURY PROCESS AUTOMATION	CLOUD-BASED CASH MANAGEMENT & TREASURY SYSTEM
<b>Technology Vendors</b>								
Argano	●	●	●	●	●	●	●	●
Avalara	○	○	○	○	○	○	○	○
Avvale	●	●	●	●	●	●	●	●
bioLock	○	○	○	○	○	○	○	○
BlackLine	◐	◐	◐	◐	◐	◑	◐	◐
Bramasol	●	●	●	●	●	●	◑	◑
Google Cloud	○	○	○	○	○	○	○	○
insightsoftware	◑	●	◑	◐	◐	◐	○	◐
Kyriba	●	●	●	●	●	●	●	●
Promenta	○	○	○	○	○	○	○	○
SAP	●	●	●	●	●	●	◑	●
Serrala	◑	◑	◑	◑	●	●	○	○
Sovos Compliance	○	○	○	○	○	○	○	○
SimpleFi Solutions	●	○	●	○	○	○	◑	◑
Thomson Reuters ONESOURCE Direct Tax	○	○	○	○	○	○	○	○
Thomson Reuters ONESOURCE Global Trade	◑	○	○	◑	○	○	○	◑
Thomson Reuters ONESOURCE Indirect Tax Determination	○	○	○	○	○	○	○	○
Tipalti	◑	◑	◑	◐	●	◑	◑	◑
TJC Group	○	○	○	○	○	○	○	○
TruQua, an IBM Company	●	●	●	●	●	●	●	●
Verbella	◑	◑	◑	◑	◑	◑	◑	◑
Vertex, Inc.	○	○	○	○	○	○	○	○
xSuite Group	○	○	○	○	○	○	○	○
<b>Consultants and Integrators</b>								
EY	●	●	●	●	●	●	●	●
Fresh FP&A, LLC	◑	◐	◑	◐	◐	◑	○	●
Kaar Technologies Inc.	●	●	●	●	●	●	◑	●
KPMG	●	●	●	●	●	●	●	●
msg global solutions	◑	●	◑	●	●	●	◑	◑
The Silicon Partners	●	●	●	●	●	●	◑	●
Syskoplan Reply	●	●	●	●	●	●	●	●
YASH Technologies	●	◐	●	◐	◐	●	●	●

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	FULL LIFECYCLE MANAGEMENT OF FIXED ASSETS	DEPRECIATION CALCULATION AND FORECASTING	LEASE ACCOUNTING COMPLIANCE	ASSET TRACKING WITH TECHNOLOGY	ASSET VALUATION AND REVALUATION	ASSET DISPOSAL	INSURANCE COVERAGE AND CLAIMS MANAGEMENT	AI / ML ENABLED ASSET MANAGEMENT PROCESS AUTOMATION	CLOUD-BASED ASSET MANAGEMENT SYSTEM
<b>Technology Vendors</b>									
Argano	●	●	●	●	●	●	●	●	●
Avalara	○	○	○	○	○	○	○	○	○
Avvale	●	●	●	●	●	●	●	●	●
bioLock	○	○	○	○	○	○	○	○	○
BlackLine	○	◐	●	○	○	○	○	○	◐
Bramasol	●	●	●	●	●	●	●	●	●
Google Cloud	○	○	○	○	○	○	○	○	○
insightsoftware	◑	◑	◑	○	◑	◑	○	○	○
Kyriba	○	○	○	○	○	○	○	○	○
Promenta	◐	○	○	○	◑	◑	○	◑	○
SAP	●	●	●	●	●	●	●	◑	●
Serrala	○	○	○	○	○	○	○	○	○
Sovos Compliance	○	○	○	○	○	○	○	○	○
SimpleFi Solutions	○	●	○	○	○	○	○	○	○
Thomson Reuters ONESOURCE Direct Tax	○	○	○	○	○	○	○	○	○
Thomson Reuters ONESOURCE Global Trade	○	○	○	○	○	○	○	○	○
Thomson Reuters ONESOURCE Indirect Tax Determination	○	◑	◑	○	○	○	○	○	◑
Tipalti	○	○	○	○	○	○	○	○	○
TJC Group	○	○	○	○	○	○	○	○	○
TruQua, an IBM Company	◑	◑	◑	◑	◑	◑	◑	◑	◑
Verbella	◑	◑	◑	◑	◑	◑	◑	◑	◑
Vertex, Inc.	○	○	○	○	○	○	○	○	○
xSuite Group	○	○	○	○	○	○	○	○	○
<b>Consultants and Integrators</b>									
EY	●	●	●	●	●	●	●	●	●
Fresh FP&A, LLC	◑	◑	◑	◑	○	◑	○	○	●
Kaar Technologies Inc.	●	●	●	●	●	●	●	◑	◑
KPMG	●	●	●	●	●	●	●	●	●
msg global solutions	●	●	●	●	●	●	●	◑	◑
The Silicon Partners	●	●	●	●	●	●	●	◑	●
Syskoplan Reply	●	●	●	●	●	●	◑	◑	●
YASH Technologies	●	●	●	●	●	●	●	●	●

\*Vendors submitted their self-assessments via electronic survey, which were then validated by SAPinsider research analysts.

○ No Capability
◐ Minimal Capability
◑ Partial Capability
◒ Major Capability
● Full Capability

	TAX CALCULATIONS	TAX COMPLIANCE	WITHHOLDING TAX	INDIRECT TAX PROCESSING	TAX REPORTING	COUNTRY-SPECIFIC TAX REGULATIONS COMPLIANCE	ELECTRONIC TAX FILING	AI / ML ENABLED TAX MANAGEMENT PROCESS AUTOMATION	CLOUD-BASED TAX MANAGEMENT SYSTEM
<b>Technology Vendors</b>									
Argano	●	●	●	●	●	●	●	●	●
Avalara	●	●	○	●	●	◐	◐	◐	●
Avvale	●	●	●	●	●	●	◐	◐	◐
bioLock	○	○	○	○	○	○	○	○	○
BlackLine	●	◐	●	◐	◐	◐	○	◐	◐
Bramasol	◐	◐	◐	◐	◐	◐	◐	◐	◐
Google Cloud	○	○	○	○	○	○	○	○	○
insightsoftware	●	●	●	●	●	●	●	●	●
Kyriba	○	○	○	○	○	○	○	○	○
Promenta	◐	◐	◐	◐	○	◐	○	○	○
SAP	●	●	●	●	●	●	●	◐	●
Serrala	○	○	○	○	○	○	○	○	○
Sovos Compliance	●	●	●	●	●	●	●	◐	●
SimpleFi Solutions	◐	○	◐	○	◐	○	○	○	○
Thomson Reuters ONESOURCE Direct Tax	◐	◐	○	○	◐	◐	◐	◐	◐
Thomson Reuters ONESOURCE Global Trade	◐	◐	○	◐	○	◐	◐	◐	◐
Thomson Reuters ONESOURCE Indirect Tax Determination	●	●	◐	●	●	●	●	◐	●
Tipalti	◐	●	○	○	◐	◐	○	◐	◐
TJC Group	○	◐	○	○	◐	◐	●	○	○
TruQua, an IBM Company	◐	◐	◐	◐	◐	◐	◐	◐	◐
Verbella	◐	◐	◐	◐	◐	◐	◐	◐	◐
Vertex, Inc.	●	◐	◐	●	◐	◐	◐	◐	◐
xSuite Group	○	○	○	○	○	○	○	○	○
<b>Consultants and Integrators</b>									
EY	●	●	●	●	●	●	●	●	●
Fresh FP&A, LLC	◐	◐	◐	◐	◐	○	◐	○	●
Kaar Technologies Inc.	◐	◐	●	●	◐	◐	◐	◐	◐
KPMG	●	●	●	●	●	●	●	◐	●
msg global solutions	●	◐	◐	◐	◐	◐	○	○	◐
The Silicon Partners	●	●	●	●	●	●	●	◐	●
Syskoplan Reply	●	●	●	●	●	●	●	◐	●
YASH Technologies	◐	◐	◐	●	●	◐	◐	◐	◐

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○ No Capability
◐ Minimal Capability
◑ Partial Capability
◒ Major Capability
● Full Capability

	PROJECT COSTING AND BUDGETING	MULTI-CURRENCY PROJECT BILLING	REVENUE RECOGNITION	PROJECT PLANNING AND ALLOCATION	TIME AND EXPENSE TRACKING	PROJECT PORTFOLIO MANAGEMENT	AI / ML ENABLED MANAGERIAL ACCOUNTING PROCESS AUTOMATION	CLOUD-BASED MANAGEMENT ACCOUNTING SYSTEM
<b>Technology Vendors</b>								
Argano	●	●	●	●	●	●	●	●
Avalara	○	○	○	○	○	○	○	○
Avvale	●	●	●	●	●	●	◑	◑
bioLock	○	○	○	○	○	○	○	○
BlackLine	○	○	◑	○	○	○	○	◑
Bramasol	◑	◑	●	◑	◑	◑	◑	◑
Google Cloud	○	○	○	○	○	○	○	○
insightsoftware	●	◑	◑	◑	◑	◑	◑	◑
Kyriba	○	○	○	○	○	○	○	○
Promenta	○	○	○	○	○	○	◑	○
SAP	●	●	●	●	●	●	◑	●
Serrala	○	○	○	○	○	○	○	○
Sovos Compliance	○	○	○	○	○	○	○	○
SimpleFi Solutions	●	◑	◑	●	◑	◑	◑	◑
Thomson Reuters ONESOURCE Direct Tax	○	○	○	○	○	○	○	○
Thomson Reuters ONESOURCE Global Trade	○	○	○	○	○	○	○	○
Thomson Reuters ONESOURCE Indirect Tax Determination	○	○	○	○	○	○	○	○
Tipalti	◑	◑	○	◑	●	◑	◑	◑
TJC Group	○	○	○	○	○	○	○	○
TruQua, an IBM Company	●	●	●	●	●	●	●	●
Verbella	◑	◑	◑	◑	◑	◑	◑	◑
Vertex, Inc.	○	○	○	○	○	○	○	○
xSuite Group	○	○	○	○	○	○	○	○
<b>Consultants and Integrators</b>								
EY	●	●	●	●	●	●	●	●
Fresh FP&A, LLC	◑	◑	◑	◑	◑	◑	○	●
Kaar Technologies Inc.	●	●	●	●	●	●	◑	●
KPMG	●	●	●	●	●	●	◑	●
msg global solutions	●	●	◑	●	◑	◑	◑	●
The Silicon Partners	●	●	●	●	●	●	◑	●
Syskoplan Reply	●	●	●	●	●	●	◑	●
YASH Technologies	●	●	●	●	◑	●	●	●

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◒ Major Capability
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	CONTRACT LIFECYCLE MANAGEMENT	REVENUE RECOGNITION COMPLIANCE	AUTOMATED BILLING PROCESS	PRICING AND DISCOUNT MANAGEMENT	CRM INTEGRATION FOR CUSTOMER VIEW	SUBSCRIPTION AND RECURRING BILLING	AI / ML ENABLED REVENUE MANAGEMENT & BILLING PROCESS AUTOMATION	CLOUD-BASED MANAGEMENT ACCOUNTING SYSTEM
<b>Technology Vendors</b>								
Argano	●	●	●	●	●	●	●	●
Avalara	○	○	○	○	○	○	○	○
Avvale	●	●	●	●	●	●	◑	●
bioLock	○	○	○	○	○	○	○	○
BlackLine	○	◐	◐	○	○	○	◐	◐
Bramasol	●	●	●	●	●	●	●	●
Google Cloud	○	○	○	○	○	○	○	○
insightsoftware	◐	◐	◐	◐	◐	◐	◐	◐
Kyriba	○	○	○	○	○	○	○	○
Promenta	○	○	○	◑	◑	○	◑	◑
SAP	●	●	●	●	○	●	◑	●
Serrala	○	○	○	○	○	○	○	○
Sovos Compliance	○	○	○	○	○	○	○	○
SimpleFi Solutions	◑	◑	○	○	●	○	◑	◑
Thomson Reuters ONESOURCE Direct Tax	○	○	○	○	○	○	○	○
Thomson Reuters ONESOURCE Global Trade	○	○	○	○	○	○	○	○
Thomson Reuters ONESOURCE Indirect Tax Determination	○	○	○	○	○	○	○	○
Tipalti	○	○	●	○	○	○	○	○
TJC Group	○	○	○	○	○	○	○	○
TruQua, an IBM Company	◑	◑	◑	◑	◑	◑	◑	◑
Verbella	◑	◑	◑	◑	◑	◑	◑	◐
Vertex, Inc.	○	○	○	○	○	○	○	○
xSuite Group	○	○	○	○	○	○	○	○
<b>Consultants and Integrators</b>								
EY	●	●	●	●	●	●	●	●
Fresh FP&A, LLC	◑	◑	○	◑	◑	◑	○	●
Kaar Technologies Inc.	◑	◐	●	●	●	◑	◑	◑
KPMG	●	●	●	●	◑	●	◑	●
msg global solutions	●	●	●	●	●	●	◑	◑
The Silicon Partners	●	●	●	●	●	●	◑	●
Syskoplan Reply	●	●	●	●	●	●	◑	●
YASH Technologies	◑	◐	◐	◑	●	◑	◑	●

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◒ Major Capability
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	CUSTOMIZABLE DASHBOARDS	AD-HOC REPORTING	PREDICTIVE ANALYTICS	REAL-TIME DATA ACCESS	KPI TRACKING	CONSOLIDATED REPORTING	AI / ML ENABLED FINANCIAL REPORTING AND ANALYTICS PROCESS AUTOMATION	CLOUD-BASED FINANCIAL REPORTING AND ANALYTICS SYSTEM
<b>Technology Vendors</b>								
Argano	●	●	●	●	●	●	●	●
Avalara	○	○	○	○	○	○	○	○
Avvale	●	●	●	●	●	●	◑	●
bioLock	○	○	○	○	○	○	○	○
BlackLine	●	●	○	●	●	●	◑	●
Bramasol	●	●	◑	◑	●	◑	◑	●
Google Cloud	◑	●	●	◑	◑	◑	●	◑
insightsoftware	●	●	●	●	●	●	◑	◑
Kyriba	○	○	○	○	○	○	○	○
Promenta	○	◑	○	●	◑	○	◑	◑
SAP	●	●	●	●	●	●	◑	●
Serrala	●	●	●	●	●	●	◑	●
Sovos Compliance	◑	◑	◑	◑	○	◑	○	○
SimpleFi Solutions	●	●	●	●	●	●	●	●
Thomson Reuters ONESOURCE Direct Tax	◑	◑	◑	◑	◑	◑	◑	◑
Thomson Reuters ONESOURCE Global Trade	◑	◑	◑	◑	◑	◑	○	◑
Thomson Reuters ONESOURCE Indirect Tax Determination	◑	◑	◑	◑	◑	◑	◑	◑
Tipalti	◑	◑	◑	◑	○	◑	◑	◑
TJC Group	○	○	○	○	○	○	○	○
TruQua, an IBM Company	●	●	●	●	●	●	●	●
Verbella	●	◑	◑	◑	◑	◑	◑	◑
Vertex, Inc.	◑	◑	○	◑	○	◑	○	◑
xSuite Group	○	○	○	○	○	○	○	○
<b>Consultants and Integrators</b>								
EY	●	●	●	●	●	●	●	●
Fresh FP&A, LLC	◑	◑	○	◑	◑	◑	○	●
Kaar Technologies Inc.	●	●	●	●	●	●	◑	◑
KPMG	●	●	●	●	●	●	◑	●
msg global solutions	●	●	◑	●	●	●	◑	●
The Silicon Partners	●	●	●	●	●	●	◑	●
Syskoplan Reply	●	●	◑	●	●	●	◑	●
YASH Technologies	●	◑	●	◑	◑	◑	●	◑

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	INTERNAL CONTROL MANAGEMENT	COMPLIANCE WITH INTERNATIONAL FINANCIAL REGULATIONS	AUDIT MANAGEMENT	FRAUD DETECTION	WORKFLOW APPROVALS FOR CONTROL	CORPORATE GOVERNANCE REPORTING	AI / ML ENABLED FINANCIAL RISK MANAGEMENT & COMPLIANCE PROCESS AUTOMATION	CLOUD-BASED FINANCIAL RISK MANAGEMENT & COMPLIANCE SYSTEM
<b>Technology Vendors</b>								
Argano	●	●	●	●	●	●	●	●
Avalara	○	○	○	○	○	○	○	○
Avvale	●	●	●	◐	●	●	◐	●
bioLock	●	●	●	●	●	●	○	●
BlackLine	●	●	●	●	●	◐	◐	◐
Bramasol	◐	◐	◐	◐	◐	◐	◐	◐
Google Cloud	○	○	○	○	○	○	○	○
insightsoftware	◐	◐	◐	◐	◐	◐	◐	◐
Kyriba	●	●	●	●	●	○	●	●
Promenta	◐	◐	◐	○	●	◐	◐	◐
SAP	●	●	●	●	●	◐	◐	●
Serrala	○	○	○	●	●	○	○	○
Sovos Compliance	●	●	●	◐	●	◐	○	○
SimpleFi Solutions	○	○	○	○	○	○	○	○
Thomson Reuters ONESOURCE Direct Tax	◐	◐	◐	○	◐	◐	◐	◐
Thomson Reuters ONESOURCE Global Trade	◐	◐	◐	○	◐	◐	◐	◐
Thomson Reuters ONESOURCE Indirect Tax Determination	○	◐	◐	◐	◐	◐	◐	◐
Tipalti	◐	◐	◐	●	●	◐	◐	◐
TJC Group	○	○	◐	○	○	○	○	○
TruQua, an IBM Company	◐	◐	◐	◐	◐	◐	◐	◐
Verbella	◐	◐	◐	◐	◐	◐	◐	◐
Vertex, Inc.	○	◐	◐	○	○	○	○	○
xSuite Group	○	○	○	○	○	○	○	○
<b>Consultants and Integrators</b>								
EY	●	●	●	●	●	●	●	●
Fresh FP&A, LLC	◐	◐	○	○	◐	◐	○	●
Kaar Technologies Inc.	◐	◐	◐	◐	◐	◐	◐	◐
KPMG	●	●	◐	●	●	●	●	●
msg global solutions	●	●	◐	◐	●	◐	◐	◐
The Silicon Partners	●	●	●	◐	●	◐	◐	◐
Syskoplan Reply	●	◐	●	◐	●	●	◐	●
YASH Technologies	◐	◐	◐	●	●	●	◐	●

\*Vendors submitted their self-assessments via electronic survey, which were then validated by SAPinsider research analysts.

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Finance Management

