



Summary of Changes Report (CSV File)

Vertex® Indirect Tax O Series® (Vertex O Series) Version 9.0

Vertex distributes the *Summary of Changes Report* with the O Series monthly data update files.

This report is available in CSV and PDF format. The CSV format includes changes to tax rates and tax rules. The PDF format, in addition to the tax rates and tax rule changes, includes changes to jurisdictional and category information.

This document describes the fields in the CSV version of the *Summary of Changes Report*. This document is also known as `SummaryofChanges(nnn).csv`, where `nnn` is the number of the monthly data update.

This document supports the following products:

- Vertex® Indirect Tax for Brazil
- Vertex® Indirect Tax for Hospitality
- Vertex® Indirect Tax for Leasing
- Vertex® Indirect Tax *O Series*® (Vertex O Series)
- Vertex® Indirect Tax for Retail
- Vertex® Indirect Tax for Communications

Region Name

This field is the impacted region.

Valid values are as follows:

- Asia Pacific
- Central/South America
- EMEA (Europe, Middle East, Africa)
- North America

Country Name

This field is the impacted country. Valid values are any country jurisdiction in the Vertex database.

Main Division Name

This field is the impacted main division.

Valid values are any main division in the Vertex database.

This field has a Null value for countries that do not recognize states or provinces. A Null value has no data and is represented by a blank field in this report.

Jurisdiction Name

This field is the impacted jurisdiction. Valid values include any jurisdiction in the Vertex database. The type of jurisdiction is in parentheses (). For more details about the jurisdiction type field, refer to Jurisdiction Type (see page 6).

Imposition Name

This field is the imposition that is associated with the applicable tax rule.

Category

This field is the Vertex taxability category that is associated with the applicable tax rule.

Tax Rule Type

This field is the type of tax rule for the applicable tax rule.

Valid values are as follows:

- Apportionment
- Deferred
- Defers To Std
- Exempt
- Flat
- Inclusion
- Max Tax
- Non Taxable
- Ovd-Deferred
- Ovd-Exempt
- Ovd-Non Taxable
- Ovd-Taxable
- Post Calc Eval
- Quantity
- Recoverable
- Taxable
- Tax Credit
- Tax Rate Adjustment
- Tier Rate
- Uses Std Rate

Change Type

This field is the type of change for the applicable tax rule.

Valid values are as follows:

- Expired
- Added

Rate

This field is the tax rate for the rule. Because some tax rules are not taxable, this field has a Null value when no tax is applied. A Null value has no data and is represented by a blank field in this report.

Effective Date

This field is the date on which a tax rule becomes effective.

Expiration Date

This field is the date on which a tax rule expires.

Tax Type

This field is the abbreviation for the Vertex tax types for the applicable tax rule. When a tax rule has multiple tax types, the values are separated by a comma (,).

Valid values are as follows:

- S: Sales
- SU: Seller Use
- CU: Consumer Use
- V: Value Added

Transaction Type

This field is the abbreviation for the Vertex transaction types for the applicable tax rule. When a tax rule has multiple transaction types, the values are separated by a comma (,).

Valid values are as follows:

- S: Sale
- L: Lease
- R: Rental
- AM: Asset Movement
- IR: Inventory Removal

Detail Text

This field contains detailed information about a conditional rule, if applicable.

Citation Text

This field refers to the tax law that requires a new tax rule, if applicable.

Tier 1, 2, 3 Min Amount; Tier 1, 2, 3 Max Amount; and Tier 1, 2, 3 Rate

These fields are the applicable tier columns for a tiered tax rule. The Min Amount and Max Amount fields describe the upper and lower boundaries of the tier. The Rate field is the rate for the associated tier.

Tier taxes apply only in the United States.

Conditional Jurisdiction Name

This field is the name of the conditional jurisdiction when a tax rule is dependent on another jurisdiction.

Conditional Jurisdiction Type

This field is the jurisdiction type of the conditional jurisdiction, if applicable.

Sales Tax Holiday Ind

This field designates when a rule indicates a tax holiday.

Valid values are as follows:

- 1: A tax rule exists for a sales tax holiday.
- 0: No tax rule exists when there is no sales tax holiday.

Sales Tax holidays apply only in the United States.

TaxRuleId

This field is the unique Vertex-generated identifier for a tax rule.

Jurisdiction Type

This field is the jurisdiction type that is referenced in the Jurisdiction Name field. For more details about the jurisdiction name field, refer to Jurisdiction Name (see page 2).

Valid values are as follows:

- Country
- State
- Province
- Territory
- County
- Parish
- Borough
- City
- District

Contacting Vertex

You can contact Vertex using any of the following methods:

- Vertex Product Support: 800.281.1900 (Monday through Friday, 8:15 A.M. to 8:00 P.M. United States Eastern Time). Please have your Customer Number and/or Service Request (case) Number available.
- Vertex Customer Portal: <https://vertexinc.custhelp.com/>
- Mail: 2301 Renaissance Blvd. King of Prussia, PA 19406 United States
- Telephone: 800.355.3500 or 610.640.4200
- Web: www.vertexinc.com/