VERTEX®

Vertex® Exemption Certificate Manager Changes CSV File Field Definitions

About this document

This document describes the fields in the .CSV version of the Exemption Certificate Manager Changes report. This document is also known as ECMChanges.csv.

Vertex distributes the ECM Changes Report with the Vertex® Indirect Tax *O Series*® monthly data update files. It is available in both .PDF and .CSV formats.

ECM Changes (.CSV) Field Definitions

Country Name – This field is the name of the country affected by the change. Valid values include any country jurisdiction in the Vertex database.

Main Division Name – This field is the main division affected by the change. In the United States and Canada, valid values are states or provinces. If a country does not have a state or province, this field may have a null value.

Jurisdiction Name – This field is the jurisdiction that is affected by the change. Valid values are any jurisdiction in the Vertex database. The type of jurisdiction is indicated in parentheses.

Valid values for the jurisdiction type include the following:

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

Change Type – This field is the type of change associated with the applicable spreadsheet row.

Valid values for change type include the following:

- FORMS – A jurisdiction that modified a form.
- VALRULES – A jurisdiction that modified a validation rule.

Changed Form Fields – When the Change Type is FORMS, the following fields are populated:

- FormName – This field is the name of the form.
- FileName – This field is the file name of the form.
- FormNumber – This field is the number assigned to the form.

Validation Rule Fields – When the Change Type is VALRULES, the following fields are populated:

- CertReasonType – This field is the reason for an Exemption Certificate. The valid values for this field are updated by the monthly data update.
- CertNumMask – This field is the mask for the rule. This field can have null values.
- CertNumberExample – This field is an example of a mask field. A mask field validates the type of information that you entered in this form. This can be null if the mask is null.
- ExpirationRule – This field is the expiration date of the validation rule.

StartDate - This field is the effective date of the applicable item.

EndDate - This field is the expiration date of the applicable item.

Contacting Vertex

You can contact Vertex using any of the following methods:

- Vertex Customer 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/