

Exemption Certificate Manager Changes

Vertex® Indirect Tax O Series®

Update: 258

May 2025



New and Changed Forms

There are no new or changed forms included in this update .

New and Changed Validation Rules

There are no new or changed validation rules included in this update .



Intended Use of this Document

This document contains only changes included in the associated data files. Vertex will often provide new or changed data with future effective dates. This document does not accumulate the data until the change is effective. Therefore you may need to refer back to older releases of this document to see changes effective in a current month, or run reports from O Series to see changes effective in a specific time period.

Downloading data from Vertex Community

Complete the following steps to download the data file from the [Vertex Community](#) customer portal.

Caution: Do not unzip or change the name of the data file you download.

1. Log in to the Vertex Community (<https://community.vertexinc.com>).
2. Click Downloads.
3. Select the account that you want to use. The names of the products and solutions that you license display.
4. Click the product card for the O Series solution that you want to update:
 - Indirect Tax O Series
 - Indirect Tax O Series - Leasing
 - Indirect Tax O Series - Communications
 - Indirect Tax O Series - Brazil
5. In the Description column, do one of the following:
 - To download a full data update, click the appropriate <product name> Files <release number> link.
 - To download a delta or interim data update, click the appropriate <product name> Updates <release number> link.

The available delta updates, interim updates, Summary of Changes, Tax Area Changes, Postal Code Changes, and software patches display. The Summary of Changes and Tax Area Changes are available in PDF and CSV format. The Postal Code Changes are available in CSV format.
6. In the File Name column, click the link to the Rate, Rule and Jurisdiction ZIP file that you want to download.

The file names follow the naming conventions in the following table; the optimized version indicates optimized in the file name.

Update type	File name
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Standard license

Full	O_VN_update_####f.zip
Delta	O_VN_update_####d.zip
Interim	O_VN_update_####inn.zip

Leasing license

Full	O_VN_Leasing_update_####f.zip
Delta	O_VN_Leasing_update_####d.zip
Interim	O_VN_Leasing_update_####inn.zip

Communications license

Full	O_VN_Telecom_update_####f.zip
Delta	O_VN_Telecom_update_####d.zip
Interim	O_VN_Telecom_update_####inn.zip

Brazil license

Full	O_VN_Brazil_update_####f.zip
Delta	O_VN_Brazil_update_####d.zip



Interim O_VN_Brazil_update_###inn.zip

where:

- **VN is the O Series version number**
- **### is the number of the data update**
- **f, d, or i is the type of update: full, delta, or interim**
- **nn is the interim number**

7. Depending on your browser settings, one of the following occurs:

- Your browser prompts you to open or save the file. Click Save to download the file to the specified location for downloads on your system.
- The file is automatically downloaded to this location.

8. To log out, click your user icon at the top of the page and sign out.

You have completed the data download. You can now apply the update.

Performing a data update through Vertex Central

Before the data update begins, O Series verifies that you have installed the correct version of the O Series software, including the correct software patch level, to use the data updates being applied. After this verification is complete, the system begins the data update process.

Complete the following steps to view and edit scheduled filter:

1. From the **System** menu, select **Data Management > Data Update**. The Data Update window displays.
2. Enter your information for the following:

Filter Name

Update Files (This field is required.)



Display and select the update file using

Save the update file To the VertexRoot\data\dataupdate directory on your server. If you save the file anywhere else, you cannot complete the update.

Note: Do not unzip the update file. Otherwise, O Series cannot recognize this file and displays the following message: The format of the file name is invalid:(Drive name):/vertex/data/import/data update file name. The file must be a zip file created by Vertex.

Remember that updates should be performed in the order they were released. Multiple files can be selected only if they are in the same directory.

If you don't see any update files in your list, you may not have specified the correct directory in your Configuration file. Refer to the Installation Guide for detailed information on setting up the system.

3. After you have entered information in these fields, select one of the following tasks for this filter

Click **Save** to save this filter.

Click **Clear All** to remove all data from the data entry window. Re-enter your data, as needed.

Click **Run** to execute the filter immediately in the data entry window.

Critical Tax Changes after a data update

Vertex maintains Critical Tax Change notices within myVertex to provide customers with up-to-the-minute information on tax-related data changes that Vertex becomes aware of after the monthly update has been delivered. On myVertex, these important notices are displayed under the 'For Immediate Attention' area of the home page, <https://my.vertexinc.com/home>.

Vertex highly recommends that you subscribe to the Critical Tax Change notices, so that you receive e-mail notifications when Critical Tax Change notices become available for your product(s). To subscribe to these notices go to myVertex at <https://my.vertexinc.com/critical-tax-changes>. Once logged into myVertex, displayed on the right side of the screen in 'Manage Subscriptions' will be a listing of the Vertex product(s), check the box next to the product(s) you would like to subscribe to, then click 'Save'.

By using this proactive approach, Vertex alerts customers, so that you have the opportunity to review the tax change notice(s) and determine if there are any potential impacts to your business. In addition, you can subscribe multiple users to receive the Critical Tax Change notice emails. Registering multiple users will assist in preventing any unforeseen issues in case a single contact was to miss a critical tax data update.

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