



ONESOURCE Certificate Manager US Content Q2 Update

Issue Date: 28 JUNE 2023

ABOUT THIS UPDATE

The 2nd Quarter Content Update for ONESOURCE Certificate Manager contains updates to US Content.

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Content Updates keep your Tax Certificate Manager up to date with the latest forms. For more assistance, use our online resources or contact Customer Support by opening a support request through the Software Support Network at <https://www.onesourceidsupport.com>, or call us at 1-866-472-2749.

TAX CERTIFICATE UPDATES

The following certificates have been updated by their issuing jurisdictions.

MULTI-JURISDICTION		
<i>CERTIFICATE NAME</i>	<i>PREVIOUS DATE</i>	<i>REVISION DATE</i>
Uniform Sales & Use Tax Resale Certificate - Multijurisdiction	10/14/2022	10/14/2022
Uniform Sales & Use Tax Resale Certificate - Multijurisdiction	01/22/2018	01/22/2018

COLORADO		
<i>CERTIFICATE NAME</i>	<i>PREVIOUS DATE</i>	<i>REVISION DATE</i>
Sales Tax Exemption On Purchases Of Machinery And Machine Tools	10/26/2017	10/26/2017

CONNECTICUT		
<i>CERTIFICATE NAME</i>	<i>PREVIOUS DATE</i>	<i>REVISION DATE</i>
Partial Exemption for Machinery, Equipment, or Repair and Replacement Parts	01/2005	01/2005
Machinery, Component Parts, and Replacement and Repair Parts of Machinery Used Directly in a Manufacturing Process	01/2005	01/2005
Exempt Purchases by Qualifying Governmental Agencies	07/2009	07/2009
Exempt Purchases of Gas, Electricity, and Heating Fuel	01/2005	01/2005
Materials, Tools, and Fuel	01/2005	01/2005
Partial Exemption of Materials, Tools, and Fuels	01/2005	01/2005

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CONNECTICUT		
<i>CERTIFICATE NAME</i>	<i>PREVIOUS DATE</i>	<i>REVISION DATE</i>
Purchases of Tangible Personal Property and Services by Qualifying Exempt Organizations	05/2004	05/2004
Contractor’s Exempt Purchase Certificate	03/2009	03/2009

IDAHO		
<i>CERTIFICATE NAME</i>	<i>PREVIOUS DATE</i>	<i>REVISION DATE</i>
Sales Tax Resale or Exemption Certificate	10/27/2022	05/24/2023

APPLYING THE CONTENT UPDATE

If you are a customer of our Enterprise Cloud Determination application, the certificate forms will be updated for you by Thomson Reuters.

If you are a customer of our Original Certificate Manager application, the certificate forms need to be updated by following the steps below.

- Downloading the Update
- Installing the Update

Downloading the Update

Use the Customer Center (<https://customercenter.sabrix.com/sabrixcc/>) to download Content Updates. Download either individual quarterly updates, or if there are missing forms because you skipped a quarterly update, download the cumulative master file:

1. Log on to the Customer Center using the username and password assigned to you by Customer Support.
2. Under **Menu -> Downloads**, find **Certificate Manager Forms Content** line.
3. Under **Currently Installed Version**, select ‘None’ for the latest forms.



4. Click **Download** and save the file (for instance, CM.2022.12.1MasterForms.zip) to a directory on the system hosting ONESOURCE Certificate Manager or save the file to a networked folder that can be accessed by that system.
5. Keep the file in the zip format because the installation process requires a zipped file.

Installing the Update

To install the Content Update:

1. Log on to ONESOURCE Certificate Manager.
2. Navigate to **Admin Settings -> Forms Import**.
3. On the above page, either drag the zip file downloaded from **Downloading the Update** section above or browse to the location of the file and upload.
4. The application will start processing the file. A spinning icon can be seen in the Forms Import section as the update process is in progress. Please wait on this screen until the process completes.
5. The Import History section will show details of form update processes that have completed successfully.
6. In case of any errors please reach out to TR Customer Support.