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ONESOURCE Certificate Manager
US Content Q3 Update
Issue Date: 04 OCTOBER 2023

ABOUT THIS UPDATE

The 3rd Quarter Content Update for ONESOURCE Certificate Manager contains updates to US Content.

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.onesourceidtsupport.com, or call us at 1-866-472-2749.

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TAX CERTIFICATE UPDATES

The following certificates have been updated by their issuing jurisdictions.

INDIANA		
CERTIFICATE NAME	*PREVIOUS DATE*	*REVISION DATE*
General Sales Tax Exemption Certificate	12/2022	06/2023

PENNSYLVANIA		
CERTIFICATE NAME	*PREVIOUS DATE*	*REVISION DATE*
Pennsylvania Exemption Certificate	03/2022	07/2023

SOUTH CAROLINA		
CERTIFICATE NAME	*PREVIOUS DATE*	*REVISION DATE*
Resale Certificate	08/17/2018	06/22/2023

WASHINGTON		
CERTIFICATE NAME	*PREVIOUS DATE*	*REVISION DATE*
Buyer's Retail Sales Tax Exemption Certificate	08/19/2021	07/18/2023

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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.