

ONESOURCE™ SALES AND USE TAX COMPLIANCE

RELEASE NOTES

23.12.1

Document Version 1

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DOCUMENT HISTORY

VERSION NUMBER	VERSION DATE	SUMMARY
1	December 29, 2023	Initial release

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SALES AND USE TAX COMPLIANCE 23.12.1 RELEASE NOTES

FORMS REVISIONS

If a multiple location version of a return listed below exists in ONESOURCE Sales and Use Tax Compliance, the revisions have been applied to that return as well.

- Colorado Local, City of Lakewood Sales Tax Return
- #Colorado Local, City of Lakewood, Belmar PIF
- #Colorado Local, City of Lakewood, Cafarelli Center PIF
- #Colorado Local, City of Lakewood, Colorado Mills PIF
- #Colorado Local, City of Lakewood, The Promenade at Denver West PIF
- Colorado Local, City of Loveland Sales Tax Return
- #Colorado Local, Colorado Springs, Shoppes on S Nevada PIF Return
- #Colorado Local, Loveland Centerra PIF Payment Form
- #Colorado Local, Loveland Centerra RSF Payment Form
- #Illinois Local, City of Urbana, Food and Beverage Tax Remittance Form
- RI, MTM, Meals and Beverage Tax Return
- #Virginia Local, Town of Bedford, Food and Beverage Tax Return
- #Virginia Local, Town of Dublin Meals Tax Return
- #Virginia Local, Town of South Boston Meals Tax Return
- #Virginia Local, Town of Tazewell Meals Tax Return

* Indicates print preview return name change

Indicates new return

SPECIAL NOTES

Next Release

ONESOURCE Sales and Use Tax Compliance Version **24.01.1** is scheduled for release on **January 30, 2024**.

STATE NOTES

All changes noted below were incorporated into the applicable returns and accompanying schedules for that state or locale. Listed changes are effective December 1, 2023, unless noted otherwise.

Interest Rate Changes

JURISDICTION	FROM	TO
Iowa	6.000%	10.000%
Kansas	6.000%	8.000%
Maine	7.000%	10.000%
New Hampshire	7.000%	9.000%
Utah	5.000%	7.000%
Vermont	4.000%	8.000%
Washington	3.000%	6.000% (effective 1/1/2024)

TAX RATE CHANGES

All tax rate changes noted below were incorporated into the application. Listed changes are effective **December 1, 2023**, unless noted otherwise.

Massachusetts

City of Swansea imposed a meals tax rate of 0.750%.

APPLICATION UPDATES

Enhancements to Ledger screens

Implemented infinite scrolling in the ledgers screens with an ability to maintain the scroll position when the user does any edit in a row. In addition to that, a new **Export** option has been added for exporting the “Current view” of the grid.

Actions	Region	Tax Locat...	Tax Level	Tax Name	Gross	Exemptions	Taxable	Rate	Tax	Tax Colle...
<input type="checkbox"/>	US-AL	N/A	CITY	GENERAL/RETAIL	146,905.00	46,905.00	100,000.00	0.030000	3,000.00	3,000.00
<input type="checkbox"/>	US-AL	N/A	CITY	GENERAL/RETAIL	1,052.63	0.00	1,052.63	0.025000	26.32	26.32
<input type="checkbox"/>	US-AL	N/A	CITY	MILLBROOK INVENTORY PULL	300,000.00	214,526.32	85,473.68	0.035000	2,991.58	2,991.58
<input type="checkbox"/>	US-AL	N/A	CITY	PRATTVILLE NON-FIXED SALE	300,000.00	46,004.00	253,996.00	0.035000	8,889.86	8,889.86
<input type="checkbox"/>	US-AL	N/A	COUNTY	AUTAUGA CONSUMERS USE	146,905.00	46,905.00	100,000.00	0.020000	2,000.00	2,000.00

New Process Screen

Introduced a new **Processes** screen to view the statuses of all the batch jobs and retrieve the files once completed. This screen will store the details of all the jobs, like **Export**, **Balance Import**, **Compute**, **Logs**, **Transfer**, **E-filing**, **Return Export** and **Tax Due Report**.

Workarea	Entity	Year	Month	Process	Status
001	ALL	2023	NOV	Transfer - Binder AL	COMPLETE
				Compute - Binder AL	COMPLETE
				Balance Import - Binder AL	COMPLETE WITH ERRORS
				Transfer - Binder AL	COMPLETE
				Balance Import - CA import error	COMPLETE WITH ERRORS

Closed Issues

Actions	Process Name	ID	Status	Entity/Chart	Binder	Start Time	End Time	Elapsed	User Name
1	Balance Import	13683	● COMPLETE WITH ERR	Entity005	Primary Filing	12/19/2023 12:58:21 AM	12/19/2023 12:58:31 AM	9s 574ms	Ankal t
2	Balance Import	13682	● COMPLETE WITH ERR	Entity005	Primary Filing	12/19/2023 12:53:34 AM	12/19/2023 12:54:55 AM	1m 20s 577ms	Ankal t
3	Balance Import	13681	● COMPLETE WITH ERR	Entity005	Primary Filing	12/19/2023 12:51:32 AM	12/19/2023 12:52:11 AM	39s 374ms	Ankal t
4	Export - Journal	20021	● COMPLETE	Entity005	Primary Filing	12/19/2023 12:47:48 AM	12/19/2023 12:47:50 AM	1s 874ms	Ankal t
5	Balance Import	13680	● COMPLETE	Entity005	Primary Filing	12/19/2023 12:47:15 AM	12/19/2023 12:47:21 AM	5s 323ms	Ankal t
6	Transfer	20020	● COMPLETE	Entity005	Primary Filing	12/19/2023 12:46:30 AM	12/19/2023 12:46:32 AM	2s 453ms	Ankal t
7	Balance Import	13678	● COMPLETE	Entity001	Primary Filing	12/18/2023 9:05:25 AM	12/18/2023 9:05:57 AM	32s 577ms	Ankal t
8	Import - Business Locations	3814	● COMPLETE	Entity003		12/18/2023 6:00:46 AM	12/18/2023 6:01:35 AM	49s 24ms	Ankal t
9	Import - Business Locations	3813	● ERRORS REMAINING	Entity003		12/18/2023 5:59:43 AM	12/18/2023 6:00:06 AM	23s 463ms	Ankal t

Enhancement to the import status

Added **Uploading** as one of the statuses between **Initializing** & **Journalizing** to show the import progress in different statuses as and when it moves accordingly, so that it would be easier to understand at which state the import is.

Actions	Log ID	Status	Start Date	Elapsed Time	Import File Name	Total	Saved	Errors	Properties
ACTIONS	13681	UPLOADING	12/19/2023 12:51:32 AM		BalanceImport_Calc-102-50K.csv	0	0	0	
ACTIONS	13680	COMPLETE	12/19/2023 12:47:15 AM	00:00:05.323	BalanceImport_Calc-102-5K.csv	5000	5000	0	

CLOSED ISSUES

Texas

Special purpose district Tax Rate updated from 0.025% to 0.05% for Draper Municipal Development District – 5061612, effective from October 1, 2023.

Tax Rate corrected for Crosswinds at South Lake Special Improvement District - 5015646.

South Carolina

Tax Rate has been fixed for the State of South Carolina. Currently, there is a difference observed in rate at Tax area ledger and this will be corrected with this fix.

Return Register-filing frequency error

An error was occurring when the user wants to change the filing frequency for any return. With this fix the error will not appear and user will be able to change the frequency as needed.