SimpleIndex Sales Tax Form Configurations

Fill Forms to Send to Vendors

1. Run the Job to Pre-fill forms

Double click the job called **1 – PreFill Forms.sic**. This job collects your standard information and pre-inserts in on all of the state forms in the Input folder. This alleviates the need to open each doc in a PDF tool and add your info one at a time. NOTE: You only need to run this job the first time you use the sales tax form filling application. Once the forms are pre-filled with your data, this SimpleIndex job is no longer required.
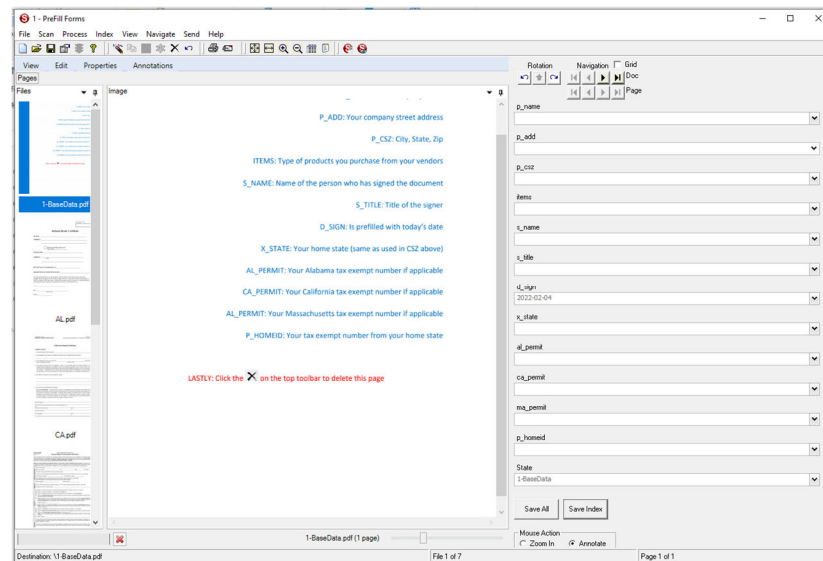
Blanks	2/4/2022 3:36 PM	File folder
Input	2/2/2022 5:35 PM	File folder
Logs	2/2/2022 4:14 PM	File folder
Output	2/2/2022 4:48 PM	File folder
Ready_For_Email	2/2/2022 4:56 PM	File folder
1 - PreFill Forms.sic	2/2/2022 4:37 PM	SimpleIndex Job	28 KB
Combine.sic	1/25/2022 9:57 AM	SimpleIndex Job	15 KB
Fill Packet for Vendor.sic	2/2/2022 2:39 PM	SimpleIndex Job	16 KB

2. Enter Your Details

The field names in this job use a short-hand that references the field labels in the state tax exempt form PDFs. However, the first image you see on screen is a key to the data required by the fields. Fill in the information described.

Next, to keep this instruction page from becoming part of the tax form set, click the ✖ on the top toolbar (under the word "Navigate" to Mark this page for Deletion.

Now click **SAVE ALL** followed by Yes. This will pass the information you entered to all the documents in the set. Click Yes on the prompt to release the batch.
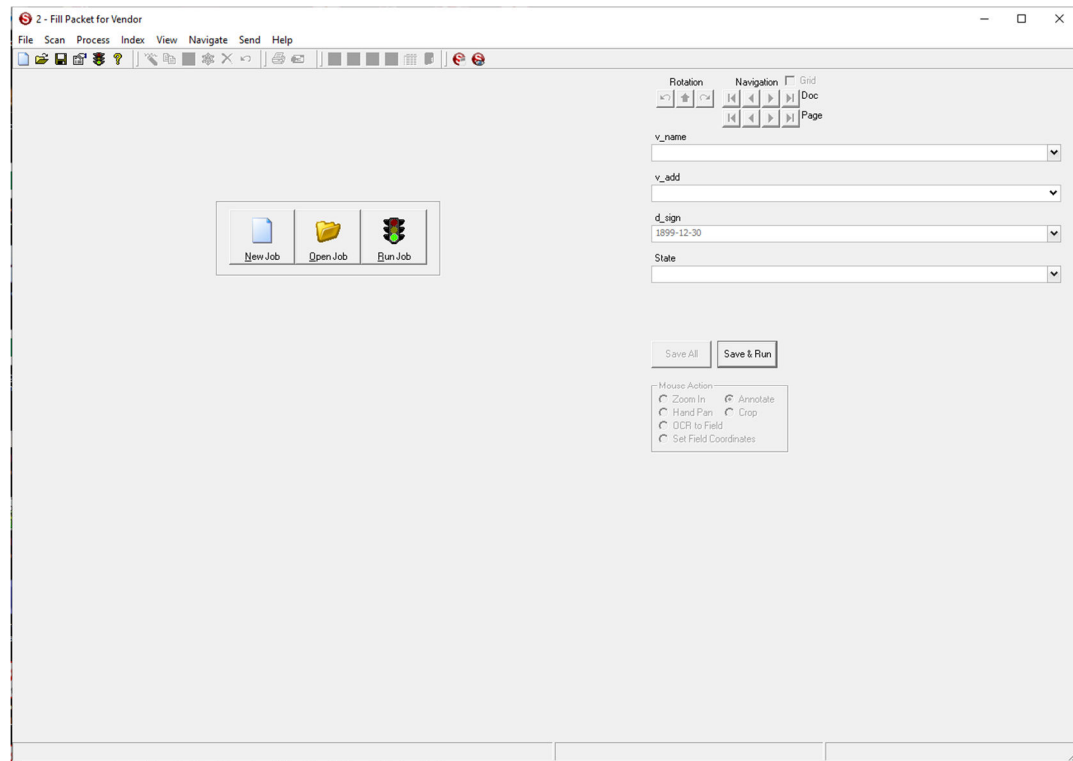
In the Input folder, you now have a set of forms that are prefilled with your company information. Each time you run the next job to add vendor details, these files will be used. Close SimpleIndex.

3. Open the job to create a packet for your vendors

When it's time to create completed forms for your vendors, double click **2 – Fill Packet for Vendor.sic**.
This will launch SimpleIndex and run the job. This job is a Pre-Index configuration meaning you will enter the data before the documents are processed and it will be applied to all the forms at once.

4. Enter the Information and Run the Job

There are only two fields for you to enter here, v_name (for the vendor name) and v_address (for the vendor address including city, state, ZIP). The other two fields are handles by SimpleIndex. After keying in that data, click Save & Run.

5. You're Done

SimpleIndex will apply the vendor information to the state forms – the ones already containing your information as purchaser – then combine the individual state files in to a single final PDF placed in a folder with the vendor's name inside the Ready_For_Email folder.

Now wasn't that Simple? | SimpleIndex