SimpleIndex Sales Tax Form Configurations

Scanning Customer Exempt Certificates

1. Place files in the Input Folder

As configured, this job processes files from the Input folder. If you have received the certificates as email attachments, place those in the Input folder. If you have been sent a paper copy, you can scan that document by your usual method and place the resulting file in the Input folder, OR the SimpleIndex job can be modified to work from your PC attached scanner.

📁 Input	2/3/2022 9:34 AM	File folder	
📁 Output	2/3/2022 9:35 AM	File folder	
ⓈIndex Customer Sales Tax Certificates.sic	2/2/2022 6:17 PM	SimpleIndex Job	19 KB
🅰Tax_Certificates.accdb	2/4/2022 2:59 PM	Microsoft Access ...	800 KB

2. Run the Job

Double click the file Index Customer Sales Tax Certificates.sic to launch SimpleIndex and run the job. SimpleIndex will collect the files from the Input Folder, perform OCR as needed and attempt to extract values such as the expiration of the certificate, the state of issue, and the certificate number. Once that process is complete, your images will appear in the SimpleIndex window along with the data that has been found.
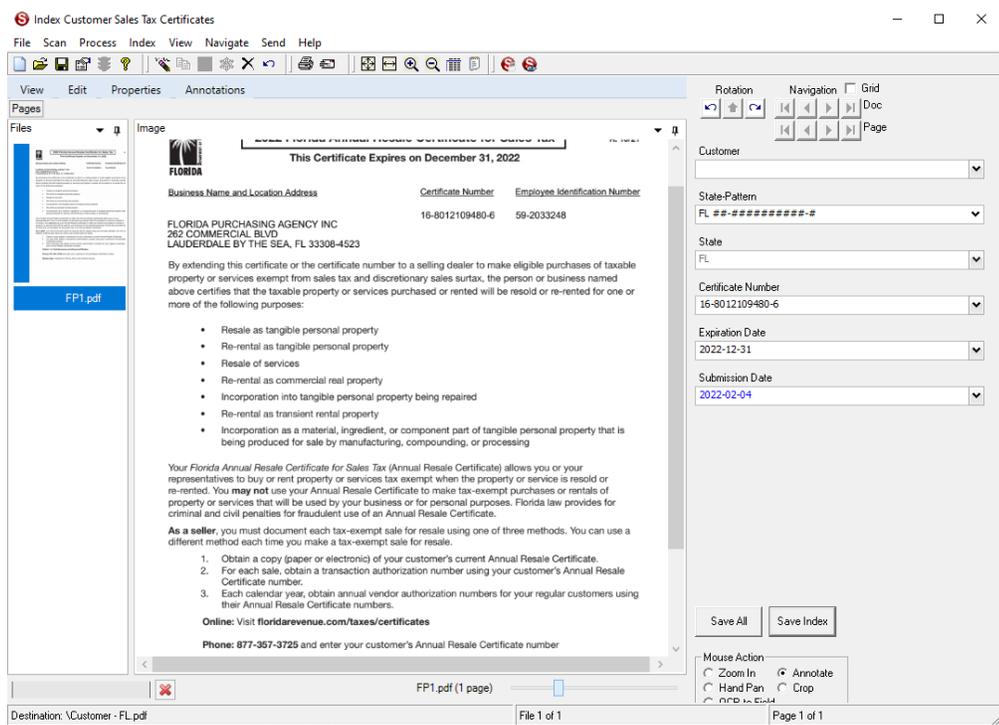
3. Verify/Key-in the Information

Enter any information that could not be captured automatically and double check the data for fields that are filled in. Pro Tip: Rather than typing in any missing data, you can choose the OCR to Field tool, just below the Save All and Save Index buttons and then simply drag a box, or lasso, the text on the page that you want to fill in the field.

Once the data is correct, click Save Index, or, simple press Enter, to go to the next record.

4. Export the Batch

After you verify the last file click Save Index/press Enter, SimpleIndex will report that everything is indexed and it's time to release the batch. Click Yes to proceed.
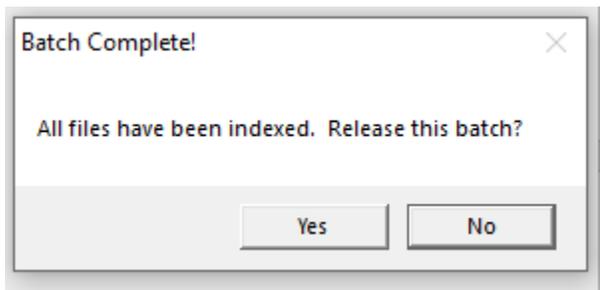
5. You're Done

When the batch is released, the documents will be stored in the Output folder and named with the customer name plus the issuing state.

To view these files at a later date, you have two easy options. Browse the Output folder, easy enough when you don't have all that many documents, or, you can run the Search Customer Sales Tax Certificates.sic job and Search any of the same fields you captured to find the relevant docs.

Now wasn't that Simple? | SimpleIndex