

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.

Index Customer Sales Tax Certificates

File Scan Process Index View Navigate Send Help

View Edit Properties Annotations

Pages

Files

Image

This Certificate Expires on December 31, 2022

Business Name and Location Address Certificate Number Employee Identification Number

FLORIDA PURCHASING AGENCY INC
262 COMMERCIAL BLVD
LAUDERDALE BY THE SEA, FL 33308-4523

16-8012109480-6 59-2033248

By extending this certificate or the certificate number to a selling dealer to make eligible purchases of taxable property or services exempt from sales tax and discretionary sales surtax, the person or business named above certifies that the taxable property or services purchased or rented will be resold or re-rented for one or more of the following purposes:

- Resale as tangible personal property
- Re-rental as tangible personal property
- Resale of services
- Re-rental as commercial real property
- Incorporation into tangible personal property being repaired
- Re-rental as transient rental property
- Incorporation as a material, ingredient, or component part of tangible personal property that is being produced for sale by manufacturing, compounding, or processing

Your Florida Annual Resale Certificate for Sales Tax (Annual Resale Certificate) allows you or your representatives to buy or rent property or services tax exempt when the property or service is resold or re-rented. You **may not** use your Annual Resale Certificate to make tax-exempt purchases or rentals of property or services that will be used by your business or for personal purposes. Florida law provides for criminal and civil penalties for fraudulent use of an Annual Resale Certificate.

As a seller, you must document each tax-exempt sale for resale using one of three methods. You can use a different method each time you make a tax-exempt sale for resale.

1. Obtain a copy (paper or electronic) of your customer's current Annual Resale Certificate.
2. For each sale, obtain a transaction authorization number using your customer's Annual Resale Certificate number.
3. Each calendar year, obtain annual vendor authorization numbers for your regular customers using their Annual Resale Certificate numbers.

Online: Visit floridarevenue.com/taxes/certificates

Phone: 877-357-3725 and enter your customer's Annual Resale Certificate number

Customer

State-Pattern
FL *****-#

State
FL

Certificate Number
16-8012109480-6

Expiration Date
2022-12-31

Submission Date
2022-02-04

Save All Save Index

Mouse Action
☐ Zoom In ☒ Annotate
☐ Hand Pan ☐ Crop

FP1.pdf (1 page)

Destination: \Customer - FL.pdf

File 1 of 1

Page 1 of 1

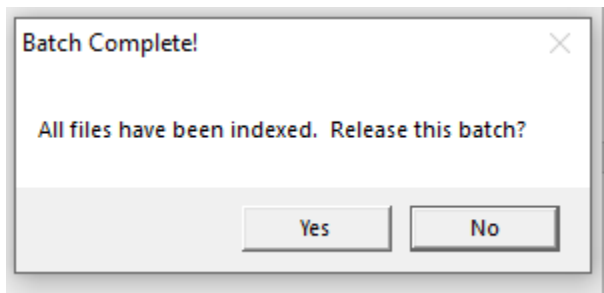
3. Verify/Key-in the Information

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, simply 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