Florida Tax Certificate Verification
Mobile App User Guide

App Versions 1.7.0 and 1.8.2 – Released August 2018
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Description
Use the Fl Tax-Verify mobile app to verify a purchaser’s Florida sales and use tax resale or exemption certificate is valid before making tax-exempt sales. To use Fl Tax-Verify, dealers must be registered to collect Florida sales and use tax and have a valid resale certificate. Fl Tax-Verify is designed for dealers who transact business away from the office or the computer.

Features
This app offers features that make it easier to keep track of Florida tax-exempt sales when a dealer is away from the business location. It allows dealers to:

- Store their own resale certificate number in the app for future reference
- Enter their customers’ certificate numbers to verify
- Store a history record which includes customers’ names, certificate numbers, date and time verified, verification response and the transaction authorization code, if valid
- Email the history report from within the app for the dealer’s permanent records

OS Compatibility
This app is optimized for use on these operating system platforms and versions:

- Android phones and tablets running Android OS 4.4 (API level 19) and higher
- Apple iPhone, iPad, and iPod touch running iOS 9.0.0 and higher

How to Use the App
This app is made up of two functional screens (Main and History) and two support screens (Help and Settings). The following pages provide a description of these screens and the actions to use the app.
Main Screen - From this screen the user selects the type of Florida tax certificate to be verified and enters certificate numbers to verify. The verification responses are displayed on this screen.

- **Type** - Choose the certificate type to verify. Currently, the only choice in the Type dropdown menu is Resale/Exemption. Future enhancements will include additional certificate types.
- **Seller** - Enter the dealer’s 13-digit Florida sales tax certificate number, without dashes, in the Seller field. Once validated, this number is stored in this field for future use unless the user clears it or turns off the setting. This number is validated each time the app is used to verify a customer’s certificate number.
- **Buyer** - Enter the customer’s Florida sales tax or tax exemption certificate number, without dashes or letters, in the Buyer field.
- Touch **Verify**. Both certificates are verified. An immediate response is received containing a transaction authorization number if the certificate is valid, or a message if it is not.

- When the Seller or Buyer field is touched, the 10-key keypad will display. A tablet will display a QWERTY keyboard with numbers and symbols turned on.

  Depending on your device’s operating system, you may also see other navigational function buttons:
  - “>” or “Next” moves the cursor to the next field
  - “<” or “Prev.” moves the cursor to the previous field
  - Backspace deletes the character left of the cursor
  - or “Done” hides the keypad; touching the blue background will also hide the keypad

  Once both the 13-digit Seller and Buyer certificate numbers are entered, touch **Verify**.

- If a Seller certificate number is not entered, or not entered correctly, a red X-mark (×) will display in the Seller field, and an error message will display at the bottom of the screen.

  Note the **Verify** button becomes the **Clear** button when an error or response message is displayed.

  Touch **Clear** to delete the error message and reset the Seller field.
**Main Screen > Verifying Certificate Numbers**

- Enter both the seller and buyer certificate numbers and touch **Verify**.

- If a Buyer certificate number is not entered, or not entered correctly, a red X-mark (✗) will display in the Buyer field, and an error message will display at the bottom of the screen.

- The **Verify** button becomes the **Clear** button when an error or response message is displayed.

- Touch **Clear** to delete the error message and reset the Buyer field.

- Re-enter the Buyer certificate number and touch **Verify**.
Main Screen > Verifying Certificate Numbers (continued)

- The Seller certificate must be valid before a Buyer certificate can be verified. If the Seller certificate number is not valid, the Buyer certificate number will not be verified.

- If the Seller certificate number is not valid, a red X-mark (×) will display in the Seller field, and a response message will display at the bottom of the screen.

- Check the number. If it was entered correctly, and you believe the message to be in error, contact the Department.

- If it was entered incorrectly, touch Clear to delete the error message and reset the Seller field.

- Re-enter the Seller certificate number and touch Verify.

- A valid Seller number is designated by a green checkmark (✓) in the Seller field.

- If the Buyer certificate is not valid, a red X-mark (×) will display in the Buyer field, and a response message will display at the bottom of the screen.

- Check the number. If it was entered correctly, and the buyer believes the message to be in error, the buyer should contact the Department.

- If it was entered incorrectly, touch Clear to delete the error message and reset the Buyer field.
• Re-enter the Buyer certificate number and touch Verify.

• When the Seller and Buyer certificates are both valid, a green checkmark (✔) is displayed in each field, and a response message displays on the screen.

  This response message states that the Buyer certificate is valid, and contains the transaction Authorization number needed for the Seller’s records. It is followed by the name of the Buyer, as found in the Department’s records. This information is stored within the app in the history report.

  Touch Clear to reset the Buyer field for the next verification.

  Always look for the colored visual cues (✔ or ✗) to quickly determine the certificate numbers that are valid, not valid, or are not formatted correctly.

• The app will store and display the most recently validated Seller certificate number for ease of use when verifying subsequent Buyer certificate numbers.

  This option can be turned off on the Settings screen.
### Main Screen > Messages Defined

There are eight potential messages (Error or Response) that will be displayed once the user touches **Verify**. They are each illustrated and explained below.

<table>
<thead>
<tr>
<th>Error</th>
<th>Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>Seller certificate number must be numeric only and exactly 13 digits in length – the number was not entered, it was entered with dashes or letters, or was not 13 digits.</td>
<td>Seller certificate not valid – the seller’s annual resale certificate, as entered, is not valid for making sales; check the number and re-enter; if you believe this response is in error, contact the Department (850-488-6800).</td>
</tr>
<tr>
<td>Buyer certificate number must be numeric only and exactly 13 digits in length – the number was not entered, it was entered with dashes or letters, or was not 13 digits.</td>
<td>Buyer certificate not valid – the buyer’s resale or exemption certificate is not valid for making tax-exempt purchases; the seller must charge sales tax on the transaction; if the buyer believes this response is in error, the buyer should contact the Department (850-488-6800).</td>
</tr>
<tr>
<td>Web site/database not available – the app could not connect with Revenue; try the inquiry again; if this error persists, you must obtain for your records a copy of your customer’s Florida Annual Resale Certificate or Consumer’s Certificate of Exemption to document tax-exempt sales; otherwise, you must charge sales tax on the transaction.</td>
<td>Transmission failed - please resend – an error occurred, and the data was not sent; please try again.</td>
</tr>
</tbody>
</table>

**No cellular service** – you are in an area where access to your mobile phone carrier is not available; no service. This message will also display on a WI-FI only device that is not connected to a wireless network.
History Screen — On this screen the user can view the verification response report, open each response to view the detailed information, email the report, and clear the history from the memory of the device.

- The verification response report is displayed on the History screen.
- The report displays the date and time of verification, the Buyer’s name, certificate number, and the verification response (Pass or Fail).
- The Buyer name is not returned or displayed when the response is Buyer certificate not valid (Fail).
- The report is sorted in chronological order. As the report grows, swipe the screen up or down to navigate through the report.
- Touching the PASS or FAIL link in the Response column will display the Response Detail, which includes the transaction authorization number.

- If PASS, the Response Detail screen displays:
  - the Response Message (Buyer certificate valid)
  - the Authorization number
  - the Buyer name from Revenue’s records
  - the verified Buyer Certificate number
  - the Date/Time of the verification inquiry

- If FAIL, the Response Detail screen displays:
  - the Response Message (Buyer certificate not valid)
  - No Authorization number
  - No Buyer name
  - the Buyer Certificate number entered
  - the Date/Time of the verification inquiry
History Screen (continued)

- From the History screen, the user can send the report via email or clear the history from the device’s memory.

Emailing history report
- Enter the email address to which the report will be sent.
- Touch Send.

- The device’s email app is opened, and the Compose Message screen is displayed.
- From Android and iOS devices, a .csv file will be attached to the email message
- The message will contain instructions for converting the data to a spreadsheet.
- The message will also contain the history report data.

1. Copy all data below (including column heading names) into notepad or WordPad
2. Save the document as a text (.txt) file
3. In Microsoft Excel or a similar
History Screen > Sending the report via email

- Data conversion instructions.

- History report data in comma separated values (csv) format.

- Attachment is visible (Android and iOS devices).

- The email is ready to be sent.

- Touch **Send**.

- Arriving email – report is attached; data conversion instructions; history report data is included.
• Open the attached .csv file in a spreadsheet program such as Excel.

• Column A contains the 13-digit buyer certificate numbers; it will need to be formatted as a number.

• Select all cells by clicking the grey box above the row numbers and to the left of the column headers.

• Double-click the column header between Columns A and B to expand all columns to fit content.

• Select Column A by clicking on the column header.

• Right-click and select “Format Cells...”
From the Category dropdown list, select “Number.”

Reduce Decimal places to “0.”

Click OK.

Buyer certificate column is now properly formatted to display all 13 digits.

Spreadsheet is ready for saving.

Clear History
The Help screen contains the following topics/sections:

- Description
- Features
- How to Use the App
- Responses
- History Screen
- Help resources
  - Send feedback to mobileapps@floridarevenue.com
  - Call 877 FL Resale (877-357-3725) 8-5 ET, M-F
  - Certificate Verification web portal (https://verify-taxcerts.floridarevenue.com/)
- Tips
- End User License Agreement
  - Conditions of Use
  - Privacy Notice
Help Screen > End User License Agreement/Certificate Verification Web Portal

End User License Agreement

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6. Legal Compliance: You certify that you are not located in a country that is subject to a U.S. Government embargo, or that has been designated by the U.S. Government as a "terrorist-supporting" country.

7. Record Keeping: You are advised to retain for your records the verification data presented by the application in order to document that the buyer qualifies to make tax-exempt purchases.

8. Third Party Beneficiary: Apple, as well as Apple's subsidiaries, are third party beneficiaries of this agreement. Upon your acceptance of the terms and conditions of this agreement, Apple will have the right to enforce this agreement against you as a third party beneficiary.

Certificate Verification Web Portal

https://verify-taxcerts.floridarevenue.com/

Certificate Verification

Welcome to the Florida Department of Revenue Certificate Verification system. Use this system to verify your customer's sales and use tax Annual Resale Certificate, Consumer's Certificates of Exemption, or communications service tax Annual Resale Certificates are valid before making tax-exempt sales.

This system will allow sellers to:
- Manually enter up to five sales tax certificate numbers or communications services tax Business Partner numbers to be verified at once, or
- Upload a batch file for certificate verification and retrieve that file 24 hours after submission

If you require assistance using this system between 8:00 a.m. and 5:00 p.m. ET, Monday through Friday, please call 877-FL-RESALE (877-357-7325).

This request is for verification of [ ].

In order to use this verification system, the seller's 13-digit certificate number must first be verified.

Contact Name: *

Certificate Number: *

Clear Verify
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**IV. OTHER**

This agreement shall be governed by and construed in accordance with the laws of THE STATE OF FLORIDA, without giving effect to any principles of conflicts of law. If any provision of this agreement shall be unlawful, void, or for any reason unenforceable, then that provision shall be deemed severable from this agreement and shall not affect the validity and enforceability of any remaining provisions. This is the entire agreement between the parties relating to the subject matter hereof, which shall not be modified except in writing, signed by both parties.
Help Screen > Linked Resources > Privacy Notice/Settings Screen


Florida Administrative Code: Rules 12E-1.002, 12E-1.003, 12E-1.004, 12E-1.006, 12E-1.013, and 12E-1.026.

General Tax Administration Program

Social security numbers are used as unique identifiers for the administration of Florida’s taxes. Social security numbers are confidential under sections 213.053 and 119.071, Florida Statutes, and not subject to disclosure as public records. The following laws govern the collection, use, or release of social security numbers for tax administration purposes:

The Privacy Act of 1974 (Pub. L. 93-579, § 7(a)-(b)).

United States Code: Title 26, sections 6103, 7213, and 7431.

Code of Federal Regulations: Title 26, section 310.6103.

Florida Statutes: Sections 119.07; 119.071; 119.0714; 198.015; 198.03; 198.08; 198.22; 198.29; 199.183; 199.202; 201.11; 201.133; 202.151; 202.17; 202.23; 202.30; 203.01; 206.02; 206.021; 206.022; 206.09; 206.095; 206.401; 206.404; 206.405; 206.408; 206.487; 206.6745; 206.877; 206.909; 206.938; 206.9385; 206.9865; 206.9915; 206.9931; 206.9942; 212.05; 212.055; 212.059; 212.06; 212.069; 212.11; 212.12; 212.17; 212.18; 213.05; 213.053; 213.055; 213.0513; 213.21; 213.28; 213.285; 213.286; 213.30; 213.34; 213.35; 213.358; 213.26; 220.181; 220.21; 220.725; 376.75; 376.76; 403.7185; 443.131; 443.163; 443.171; 443.1715; 538.09; 538.11; 538.25; 624.5902; and 681.117.


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1. Links to federal government, state government, or local government sites.
2. Links to educational or non-profit organizations that complement the information or services provided by the Florida Department of Revenue.
3. Links to Web sites owned by private companies are only provided when their products or services are a part of delivering service to our customers.

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Settings Screen

Settings Screen

Certificate Verification

Settings Save my certificate number as default?

When turned on, the seller certificate number will be stored in the app for future use.

When turned off, the seller certificate number will not be stored following shut-down and restart of the app.

Florida Tax-Verify Certificate Verification Application

v. 1.7.0, Released August 2018

Developed by General Tax Administration Program Information Services Program

When turned off, the seller certificate number will not be stored following shut-down and restart of the app.

Florida Tax-Verify Certificate Verification Application
v. 1.7.0, Released August 2018

Developed by General Tax Administration Program Information Services Program
## Tips

- This app is optimized for use on these platforms and versions: Android version 4.4 and higher; and iOS version 9.0 and higher.

- When entering certificate numbers, omit dashes and letters. Enter 13 numerals only.

- Response times will vary based on type of mobile device, battery charge, signal strength, and service provider.

## Known Issues

**Android Devices**

- Use of Back Button - takes the user out of the app instead of to the last screen viewed. This is the way the back button is designed to work. Each screen of the app is a top-level page. Touching the back button from one of those screens takes the user out of the app. From a linked screen or page, touching the back button returns the user to the page from which they linked.

## Troubleshooting

**Problem**

- The app unexpectedly quits, stops responding, or won’t open.

**Try this:**

- Make sure you’re connected to the Internet
- Close and restart the app
- Turn off and restart your device
- Update your device software and your apps