



TAX SYSTEMS



MTD Compliance Portal Demo Entity Guide

Version 4.3



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1. Introduction

About this guide

This guide provides an overview of the Demo entity feature, including:

- Using the demo entity feature
- Creating a single demo entity
- How to identify demo entities
- Features you can and cannot use with a demo entity

Technical Support

We provide a technical support help desk for users requiring assistance. The help desk can be contacted by telephone between the hours of 9.00 am and 5.30 pm, Monday to Friday excluding public holidays.

If you require help or further information, please contact the support team on:		
UK:	Tel: +44(0) 1784 777 666	Email: support@taxsystems.com
Ireland:	Tel: +353 (0) 1661 9976	Email: support@taxsystems.ie

2. Overview

The demo entity feature allows you to experience the end to end process of digitally submitting a VAT Return within a simulation environment, using data that we have provided.

You can use this simulation to familiarise yourself with the portal and try out different features, without the need to actually submit a real VAT Return.

Using this feature will not generate an actual test submission to HMRC's APIs, since they have not provided a way to do this in their live environment.

Note: *You cannot use the demo entity feature with **Group entities or the AlphaVAT calculation method**.*

3. Using the demo entity feature

Demo entities use hypothetical data that we have provided, to display obligations, payments, liabilities and submission receipt information.

You can use this simulation to create a **single entity** and try out functionality and learn to use the MTD Compliance Portal, without having to actually submit a real VAT Return.

It also provides a useful tool for training team members, demonstrating the submission process and having a dry run before actually submitting a VAT Return for a real entity.

Using this feature will not generate an actual test submission to HMRC's APIs, since they have not provided a way to do this in their live environment.

Important: *It is not possible to authorise a demo entity, because the authorisation process involves logging into the HMRC website in order to provide authorisation for the portal to access the entity's Business Tax Account.*

Since the demo entity uses test data and is not required to have a valid VAT Registration number, the authorisation process would fail. It has therefore been bypassed for the purposes of the demo simulation.

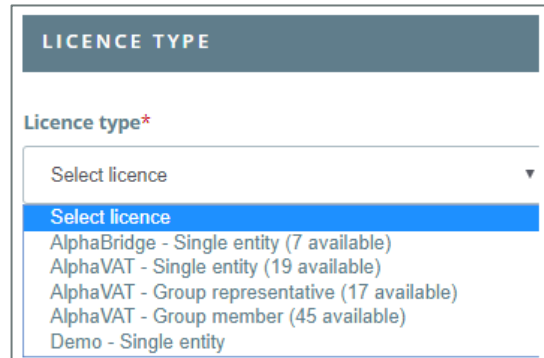
4. How to create a single demo entity

You create your demo entity in exactly the same way that you would create a real single entity.

1. From the Entity management screen, select **Add new entity**.
2. Click on the **Licence type** and select the Demo entity from the **drop-down list**.

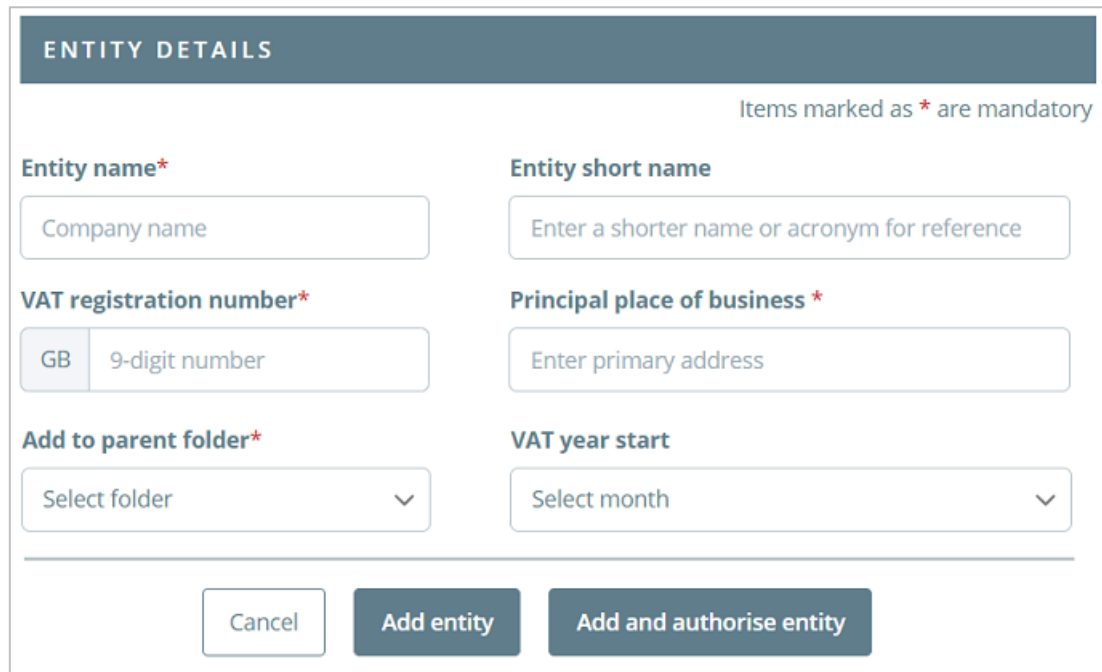
Note: You cannot create a group entity as a demo entity.

Important: Licences are not assigned to demo entities, only to real entities. You can create as many demo entities as you need to, without it impacting your licence numbers.



The screenshot shows a dropdown menu titled 'LICENCE TYPE'. Below the title, the label 'Licence type*' is followed by a dropdown list. The list is currently open, showing 'Select licence' at the top, followed by a blue bar with 'Select licence'. Below this, there are four options: 'AlphaBridge - Single entity (7 available)', 'AlphaVAT - Single entity (19 available)', 'AlphaVAT - Group representative (17 available)', and 'AlphaVAT - Group member (45 available)'. At the bottom of the list is 'Demo - Single entity'.

3. In the **Entity Details** section, fields marked with an asterisk (*) are mandatory and must be completed, even for a demo entity.



The screenshot shows the 'ENTITY DETAILS' form. At the top right, it says 'Items marked as * are mandatory'. The form has several fields: 'Entity name*' (with a placeholder 'Company name'), 'Entity short name' (with a placeholder 'Enter a shorter name or acronym for reference'), 'VAT registration number*' (with a dropdown for 'GB' and a placeholder '9-digit number'), 'Principal place of business*' (with a placeholder 'Enter primary address'), 'Add to parent folder*' (with a dropdown 'Select folder'), and 'VAT year start' (with a dropdown 'Select month'). At the bottom, there are three buttons: 'Cancel', 'Add entity', and 'Add and authorise entity'.

When you are completing this section, you **should not** base it on a real entity that you might need to create later on.

4. Fill in the **Entity name**, **VAT registration number** and **Principal place of business** fields (mandatory). We recommend typing in a made-up entity name and a random 9-digit number that is not a real VAT registration number.
5. You can enter a **shorter name** or acronym for the entity (optional).
6. You can select a **month** from the drop-down list, to indicate the start of the VAT year for your demo entity (optional).
7. Select the **folder** that you want your demo entity to reside under, from the drop-down list (mandatory).
8. Once you have filled in all the details required for your demo entity, you can select one of the following options:
 - **Add entity:** This allows you to create your new demo entity and will take you back to the Entity management screen.
 - **Add and authorise:** This option will be greyed out and you will not be able to select it. This is due to the demo entity feature being designed as a simulation tool, that allows users to familiarise themselves with the MTD Compliance Portal and its features. As such, it cannot interact directly with HMRC.
 - **Cancel:** This will cancel the creation of the entity.

Cancel

Add entity

Add and authorise entity

5. How to identify a demo entity

Demo entities can be identified via their entity name which displays the green flag icon.



<div style="display: flex; justify-content: space-between; align-items: center;"> <input type="checkbox"/> Training Edit folder </div>						
<input type="checkbox"/>	Holden Limited	/Training	Qtr to Mar 2019	07/05/2019	Prepare	
<input type="checkbox"/>	Joe Malone Limited	/Training	Qtr to May 2019	07/07/2019	Review & submit	
<input type="checkbox"/>	Joe Demo	/Training			Prepare	

6. What features can I use with a demo entity?

Once you have created your Demo entity, you will be able to try out the following features (depending on the permissions assigned to your user role):

- Edit your demo entity's details
- Move your demo entity to another folder (Administrators and Superusers only)
- Assign user access to your demo entity (Administrators and Superusers only)
- Prepare a demo entity's VAT Return using AlphaBridge
- Choose between using the AlphaBridge template or uploading your own named file when preparing their demo entity's VAT Returns
- Finalise your demo entities VAT Return
- View and print your submission receipt (this is generated from data that we provide for the purposes of simulating the real experience)
- View your demo entity's obligations (these are generated from data that we provide for the purposes of simulating the real experience)
- View your demo entity's payments and liabilities (these are generated from data that we provide for the purposes of simulating the real experience)

7. What features can I not use with a demo entity?

The following features cannot be used with a demo entity because it is not possible to replicate them in order to simulate the real experience:

- The HMRC Authorisation process
- The actual HMRC VAT Return submission process (this is however, simulated)
- Creating and managing group entities
- Preparing your VAT Return using AlphaVAT

8. Finalising your demo entity's VAT Return

Once you have prepared your demo entity's VAT Return using AlphaBridge you will be presented with the Entity details screen where you will see a summary of your VAT Return values.

Joe Malone Limited

Edit entity

Home

VAT Returns

Payments & liabilities

Qtr to Oct 2019
Due: 07/12/2019

Qtr to Jan 2020
Due: 07/03/2020

Qtr to Jul 2019
Submitted

Qtr to Apr 2019
Submitted

Qtr to Jan 2019
Submitted

Qtr to Oct 2018
Submitted

Qtr to Jul 2018
Submitted

Qtr to Apr 2018
Submitted

VAT Return for Qtr to Oct 2019

Your VAT Return is now ready based on the data uploaded from the AlphaBridge template.
You can amend the data by updating the AlphaBridge template and choosing to 'Post to AlphaBridge portal', or if the VAT Return below is accurate then you can mark this as finalised. This demo VAT Return can not be submitted to HMRC.

Finalise

Calculation by: N/A
Last updated: 07/11/2019 11:54:51
Return method: AlphaBridge (change method)
Download template

1	VAT due in this period on sales and other outputs:	£	200.00
2	VAT due in this period on acquisitions from other EC Member States:	£	0.00
3	Total VAT due (the sum of boxes 1 and 2):	£	200.00
4	VAT reclaimed in this period on purchases and other inputs (including acquisitions from the EC):	£	0.00
5	Net VAT to pay to HMRC:	£	200.00
6	Total value of sales and all other outputs excluding any VAT:	£	0.00
7	Total value of purchases and all other inputs excluding any VAT:	£	0.00
8	Total value of all supplies of goods and related costs, excluding any VAT, to other EC Member States:	£	0.00
9	Total value of all acquisitions of goods and related costs, excluding any VAT, from other EC Member States:	£	0.00

You will now have the following options:

- **Finalise:** This allows you to finalise your demo entity's VAT Return
- **Change method:** This allows you to change the VAT Return calculation method. For AlphaBridge customers, you will be able to switch between uploading a file or downloading the AlphaBridge template. For AlphaVAT customers, you will be able to switch between using AlphaVAT or AlphaBridge to prepare your VAT Return.
- **Edit entity:** This allows you to edit your demo entity's details.

Once you are happy with your VAT Return, click on the **Finalise** button. You will now have the option to Undo finalise (should you want to make changes to your demo entity's VAT Return) or to Finish demo VAT Return.

Your VAT Return has now been calculated based on the data provided in AlphaBridge.
This demo VAT Return can not be submitted to HMRC.
Now you can select 'Finish demo VAT Return' to see how a simulated VAT Return will be shown in the system once finalised, you will not longer be able to edit this calculation after this action has been taken.

Undo finalise

Finish demo VAT Return



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