



TAX SYSTEMS



MTD Compliance Portal Single Entities Guide

Version 4.3



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1. Introduction

About this Guide

This guide explains how to create and manage a single entity on the MTD Compliance Portal and includes:

- Licence options
- Add and edit a single entity
- Delete a single entity
- Move a single entity
- Assign user access

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 of licence options

The MTD Compliance Portal provides a range of features to help you create and manage your entities. Single entities can be created from the Entity management screen and can be saved into specific folders.

When you create a new single entity you will need to select the Licence type and this will determine the submission method that you can use to prepare your entity's VAT Return.

The Licences available to you, will depend on whether you are an AlphaBridge customer or an AlphaVAT customer.

AlphaBridge customer licence options

If you are an AlphaBridge customer, you will be able to choose from the following Licence options:

- AlphaBridge – Single entity (XX available)
- Demo – Single entity

AlphaVAT customer licence options

If you are an AlphaVAT customer, you will be able to choose from the following Licence options:

- AlphaBridge – Single entity (XX available)
- AlphaVAT – Single entity (XX available)
- Demo – Single entity

IMPORTANT: *If you create an entity and you select an AlphaVAT licence for it, you will not be able to change the licence type to AlphaBridge. However, if you create an entity and you select an AlphaBridge licence you can upgrade the entity to an AlphaVAT licence.*

AlphaVAT customers may also choose to purchase licences for the **Group entity feature** and this will provide them with two additional options in the licence type drop-down list:

- AlphaVAT – Group representative (XX available)
- AlphaVAT – Group member (XX available)

For more information on setting up a group entity, please refer to the **Group Entity Guide**. If you would like to create a Demo entity to learn more about the features available, see the **Demo Entity Guide**.

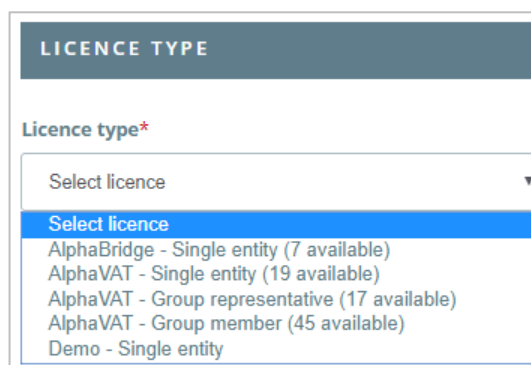
3. Managing single entities

Add a new single entity

This feature allows you to add a new single entity to the portal. From the Entity management screen:

1. Select **Add new entity**.
2. Select the single entity **Licence type** that you want to create from the **drop-down list**:

- **AlphaBridge - Single entity:** Creates a single entity that is assigned an AlphaBridge Licence. This will only allow you to prepare your VAT Returns using the AlphaBridge submission method.
- **AlphaVAT - Single entity:** Creates a single entity that is assigned an AlphaVAT licence. This will allow you to prepare your entity's VAT Return for using either the AlphaVAT or AlphaBridge submission methods.

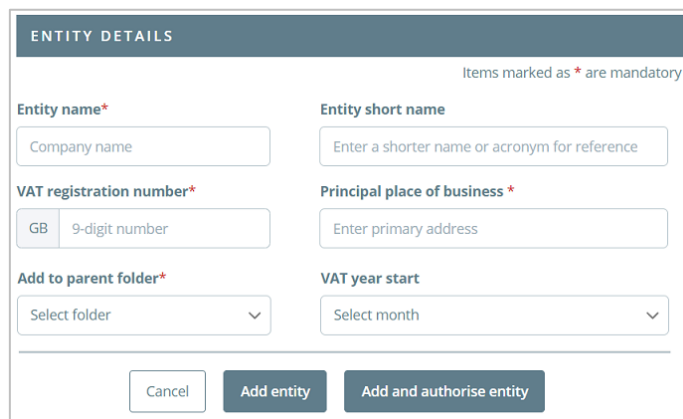


IMPORTANT: Please ensure that you **double check your licence** selection before you finish creating the entity. If you are an AlphaVAT customer, entities that are assigned an AlphaBridge licence can be upgraded to an AlphaVAT licence at any point using the Edit Entity feature. But it is not possible to downgrade your licence option from AlphaVAT to AlphaBridge once your entity has been created.

You can also create a single demo entity that you can use for training/learning purposes. For more information, please refer to the **Demo Entity Guide**. For the creation of group entities, please refer to the **Group Entity Guide**.

If you have been assigned the **Implementation user role**, there will be additional options shown in this drop-down list. Please refer to the **Implementation User Guide**.

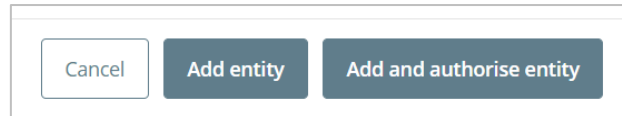
3. In the **Entity details** section, fields marked with an asterisk (*) are mandatory and must be completed.



4. Fill in the **Entity name**, **VAT registration number** and the **Principal place of business** fields (mandatory). Care should be taken when typing in the VRN, since this cannot be changed once the entity has been created. If you make a mistake, you will need to delete the entity and create it again.
5. You can enter a **short name** or acronym for the entity (optional).
6. You can select the **month** that your VAT year starts from by clicking on the **drop-down list** (optional).
7. Select the **folder** that you want your entity to reside under from the **drop-down list** (mandatory).
8. Once you have filled in all the details required for the entity, you can select one of the following options:
 - **Add entity:** This allows you to create your new entity and will take you back to the Entity management screen.
 - **Add and authorise:** This allows you to create your new entity and will take you to the Authorisation wizard, where you can begin the authorisation process. For more information please refer to the the Entity authorisation guide.

***Note:** If you have created a demo entity, 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. For more information, please refer to the Demo Entity Guide.*

- **Cancel:** This will cancel the creation of the entity.



The image shows a horizontal bar with three buttons. The first button is light grey and labeled 'Cancel'. The second and third buttons are dark blue with white text, labeled 'Add entity' and 'Add and authorise entity' respectively.

For more information on the authorisation process, see the **Entity Authorisation Guide**.

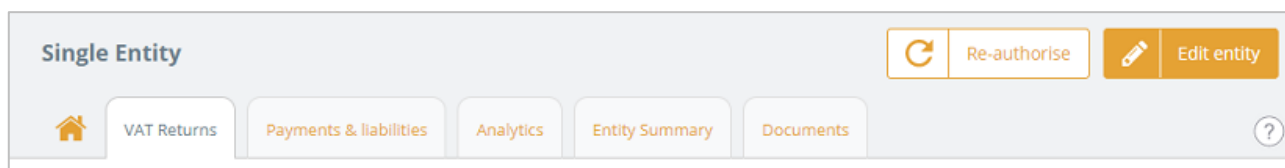
Edit a single entity

This allows you to edit the details of your entity. However, you are **not allowed** to change the VAT registration number that you have entered.

This is due to the authorisation process, which is required so that HMRC has a record stating that you are happy for the portal to access the entity's Business Tax Account, in order to facilitate the digital submission of your VAT Returns for the entity.

Important: If the VAT Registration number you have entered is incorrect, you will need to delete the entity and create it again.

1. From the Entity management screen, click on the entity's **name**.
2. This will display the Entity summary screen. Click on the **Edit entity** button.



3. Your ability to amend the Licence type will depend on which licence you selected when you created the entity.

Entity created with an AlphaBridge – Single licence:

- If you are an AlphaBridge customer, this option will be greyed out and cannot be changed. Should your business decide to move onto AlphaVAT, you will then be able to upgrade the entity from a single AlphaBridge licence to one of the AlphaVAT licences.
- If you are an AlphaVAT Customer, you will be able to upgrade your entity from a single AlphaBridge licence to a single AlphaVAT licence or to a Group Licence if you have purchased these.

Entity created with an AlphaVAT – Single Licence: If you have created an AlphaVAT Single entity, you cannot change the licence type and so this box will be greyed out.

Entity created as a Demo Single Entity: If you have created a Demo entity, you cannot convert this into a “real” entity and so the licence type will be greyed out and cannot be changed.

4. In the Entity details section, you can update the entity's **Name, Short name, Principal place of business** and select/change the **VAT year start** month.
5. You can select a different **folder** for the entity to reside under from the **drop-down list**. This will **move** the entity from its current location into the folder you have selected.
6. Once you have made your changes, click on the **Update entity** button. To discard your changes, select **Cancel**.

Delete a single entity

1. From the Entity management screen, select the entity you want to delete by checking the **tick box** next to it and click on the **Delete** button.

<div><div>Add folder</div><div>Move to</div><div>Delete</div><div>Assign user</div></div> <div></div>				
VAT entity	Folder	Next obligation period	Next obligation due	Status
<input type="checkbox"/> JOET DEMO				<div>Edit folder</div>
<input type="checkbox"/> Holden Limited	/Training	Qtr to Mar 2019	07/05/2019	Prepare
<input checked="" type="checkbox"/> Joe Demo	/Training	Qtr to Mar 2019	07/05/2019	Prepare

2. You will then be asked to confirm that you want to delete the entity by selecting **Yes**.

If you do not want to proceed press **Cancel**.

Delete item

Are you sure you want to delete this item: - Joe Demo

Cancel

Yes

Move a single entity

There are two ways to move an entity. You can move an entity by editing the entity, selecting a different folder for the entity to reside in and saving your changes (refer to Edit a single entity on page 6). You can also use the move feature as outlined below.

1. From the Entity management screen, select the entity you want to move by checking the **tick box** next to it and click on the **Move to** button.

<div><div>Add folder</div><div>Move to</div><div>Delete</div><div>Assign user</div></div> <div></div>				
VAT entity	Folder	Next obligation period	Next obligation due	Status
<input type="checkbox"/> JOET DEMO				<div>Edit folder</div>
<input type="checkbox"/> Holden Limited	/Training	Qtr to Mar 2019	07/05/2019	Prepare
<input checked="" type="checkbox"/> Joe Demo	/Training	Qtr to Mar 2019	07/05/2019	Prepare

2. The Move folder dialog box will appear. Select the **folder** you want to move your entity into from the **drop-down list** and click on **Save**.

If you do not want to proceed press **Cancel**.

Move 'Joe Demo' folder

Move to

JoeT Demo

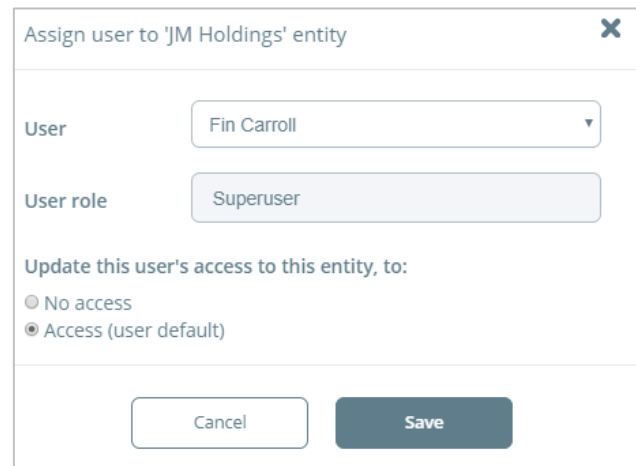
Cancel

Save

Assign user

The Assign user feature allows you to restrict or allow user access to specific entities.

1. Select the entity that you would like to assign access to by checking the **tick box** next to it.
2. Click on the **Assign user** button and the Assign user dialog will appear.
3. Select a user from the **drop down list** and their user role will be displayed.
4. The system default is to allow access to an entity. You can change this by selecting the **No access** option. To revoke this, repeat the process and select the **Access (user default)** option.
5. Click on **Save**.



The dialog box is titled "Assign user to 'JM Holdings' entity" with a close button (X) in the top right corner. It contains two input fields: "User" with a dropdown menu showing "Fin Carroll" and a downward arrow, and "User role" with a text box showing "Superuser". Below these fields is a section titled "Update this user's access to this entity, to:" with two radio button options: "No access" and "Access (user default)". The "Access (user default)" option is selected. At the bottom of the dialog are two buttons: "Cancel" and "Save".



TAX SYSTEMS



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