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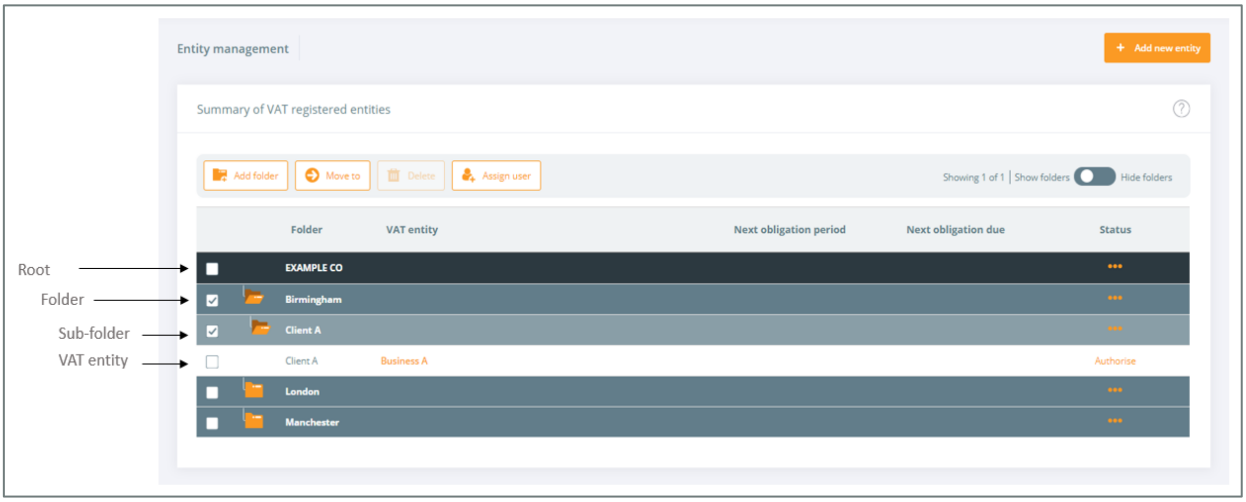
Enhanced Entity Management

AlphaBridge V1.3

We have updated the entity management feature to provide additional functionality. It is now possible to set up a folder structure on AlphaBridge, into which you can put your existing and new VAT registered entities. Folder access rights (access/no access) can be used to control which users can access the folder.

Every customer has a 'ROOT' folder which is set up by Tax Systems when you purchase our MTD solution. The root folder is given your customer name and this cannot be amended. Only users with the role of **Superuser** and **System Admin** have the permissions that alllow them to add or delete folders and assign user access to folders.

Please see the diagram below for an example of how a folder structure could look. It is possible to create subfolders within folders and we haved used grey tones to indicate the level of the folder in the overall structure. The root, which is the highest folder level, is the darkest with the tone lightening as the level decreases.



There are new buttons on this screen for performing the following actions:

- **Add** folder
- **Move** folder or entity
- **Delete** folder or entity
- **Assign user** access

These buttons are only enabled if the user role has the relevant permission.

If you want to return to a 'flat view' change the toggle on the right hand side from **Show folders** to **Hide folders**.

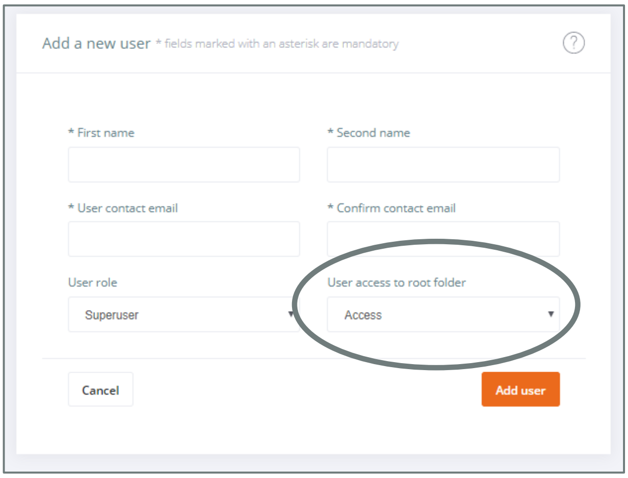
If you want to organise you VAT entities within a folder structure, rather than having a flat structure, we recommend that you do not have a mixture of entities and folders at the same level.

Controlling user access

All existing users will be granted access to the root folder by default. If you wish to restrict access to the root folder, you will need to go into each of the users via the **User management** screen and set the **User access to root folder** field to **No access**.

There are currently two levels of access:

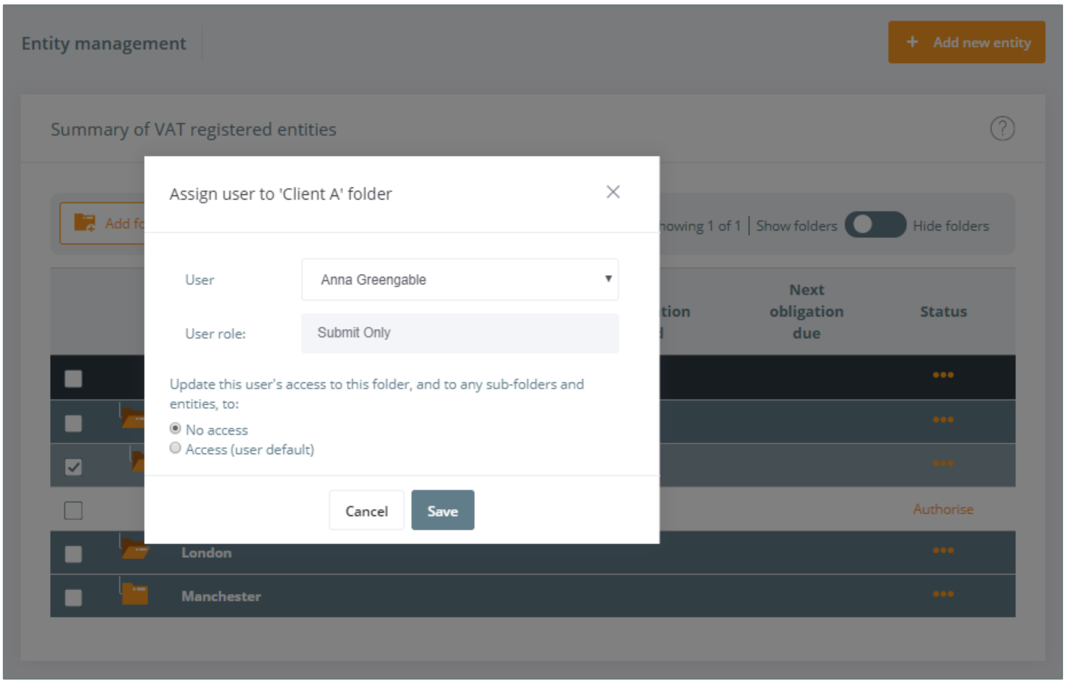
- Access
- No access



Access permissions are inherited from the higher level folders. Therefore once a user is assigned access to a folder, the user inherits that default permission on all subfolders and entities within those folders. However, it is possible to override the inherited permission at subfolder and entity level to restrict or permit user access.

The actions that a user can perform within a folder or entity, are determined by the user role that the user has been allocated.

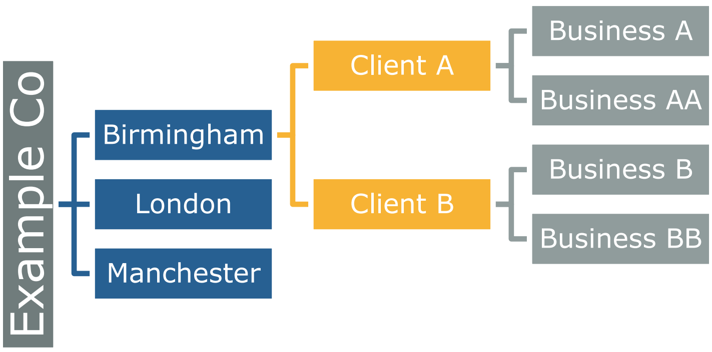
To assign a user to a folder or a specific VAT entity you need to select the folder or entity in the **Entity management** screen and then click on **Assign user**. You then need to select the user from the drop down list. This will display the user's default (inherited) permission, which you can override if required.



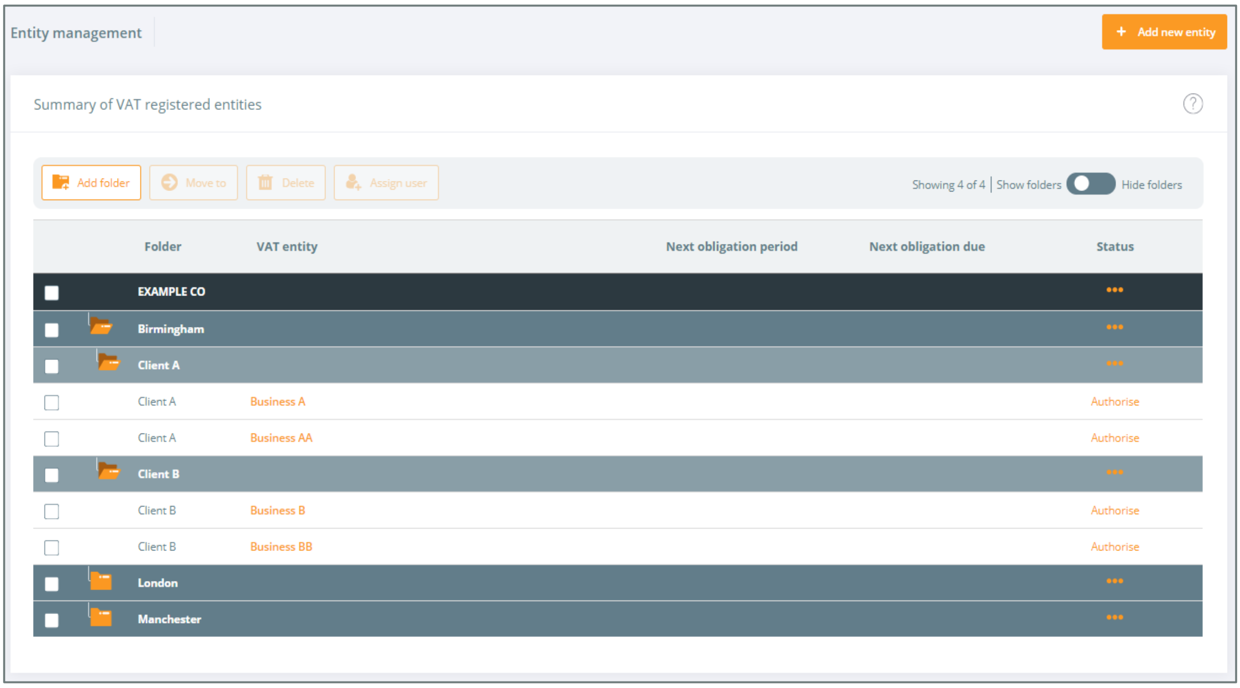
Example folder structure and user permissions

This customer has their root folder called **Example Co.** Below that are three folders that have been created for each of the customer's offices.

Within the Birminham office folder, are two client folders and each of these folders contains two business entities.



User #1 has been created and has been given the Superuser role, with permission to the root folder and inherited permission to all other subfolders and entities. This is what User #1 sees on the **Entity management** screen:



If User #1 was not allowed to see a specific folder, the **Assign user** feature can be used to restrict the folder permission to **No access** and override the inherited permission. To do this:

- Select the folder
- Click on **Assign user** button
- Select the user
- Set permission to **No access**

User #2 has been created and given the Edit & Submit role, but is only allowed access to a specific client in the Birmingham folder, called Business AA. This is what Anna sees on the **Entity management** screen: