

# OPTO

# Creating An Account

Oregon Privilege Tax Online System

JUNE 2022

# Creating An Account – Important Information

**Do you already have an Account? Yes?**



Do not create a second account if you already have one for this company.

If you already have an account, you can skip the account setup and move to adding a new license. (Go to Creating a License document or video)



# Creating Your Account – Step by Step

**Only Continue with this step-by-step guide if you do not have an existing account!**

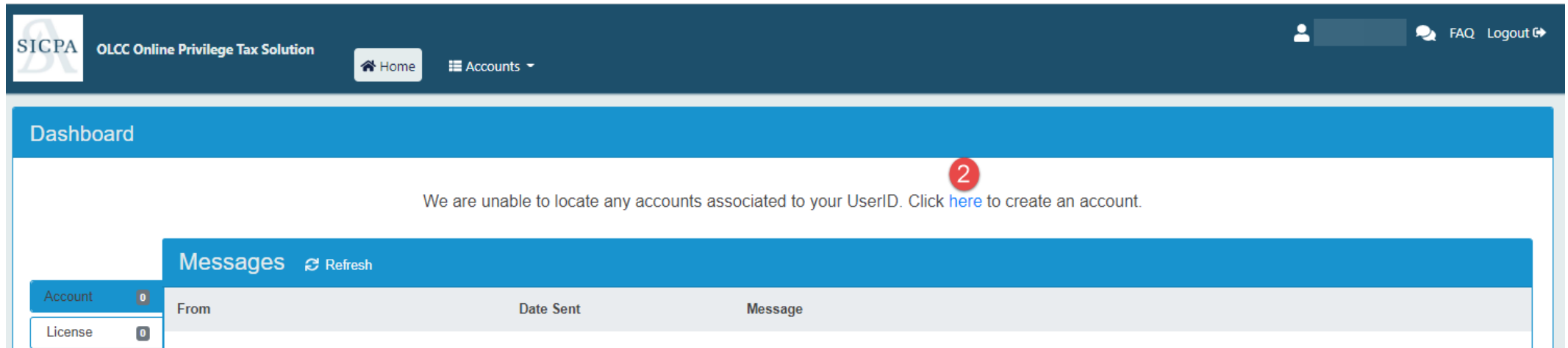
## STEP 1

**Login to Oregon Privilege Tax System** <https://or.setsonline.com>

If you are unsure or do not have a login, please refer to the Creating your userID document or video.

## STEP 2

**From Dashboard , Click on the word [here](#) to begin account creation**



The screenshot shows the OLCC Online Privilege Tax Solution dashboard. The top navigation bar includes the SICPA logo, the text "OLCC Online Privilege Tax Solution", and navigation links for "Home" and "Accounts". On the right side of the navigation bar, there is a user profile icon, a chat icon, and links for "FAQ" and "Logout". The main content area is titled "Dashboard" and contains a message: "We are unable to locate any accounts associated to your UserID. Click [here](#) to create an account." A red circle with the number "2" is placed over the word "here" in the message. Below the message is a "Messages" section with a "Refresh" button. On the left side of the dashboard, there are two summary cards: "Account" with a count of "0" and "License" with a count of "0".

# Creating Your Account – Step by Step

## STEP 3

### Enter the Company Information

Enter the Legal and Business Trade Names, the phone number at the account location, fax number (optional) and website (optional)

### Create Account

COMPANY INFORMATION

LEGAL BUSINESS NAME \* Required Fields are labeled with an asterisk

BUSINESS TRADE NAME \*

PHONE NUMBER \*      FAX NUMBER

WEBSITE

WEBSITE MUST BEGIN WITH HTTP:// OR HTTPS://

**IMPORTANT NOTE: Please do not set up more than one account unless you own or file tax returns for more than one company**

# Creating Your Account – Step by Step

STEP 4

Enter the physical address information

STEP 5

Enter the mailing address information

## Create Account

### PHYSICAL ADDRESS INFORMATION

Required Fields are labeled with an asterisk

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ADDRESS 1 \*

ADDRESS 2

CITY \*

STATE \*

ZIP CODE \*

COUNTRY \*

### MAILING ADDRESS INFORMATION

HELPFUL HINT: Use the checkbox if your mailing is the same as your physical

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CLICK THIS CHECKBOX IF THE MAILING ADDRESS IS THE SAME AS THE PHYSICAL ADDRESS

ADDRESS 1 \*

ADDRESS 2

CITY \*

STATE \*

ZIP CODE \*

COUNTRY \*

# Creating Your Account – Step by Step

## STEP 6

### Enter the Primary Contact for the Account

This should be the person responsible for the account. This person would be the recipient of most communications and/or notifications regarding the account.

Create Account

PRIMARY CONTACT INFORMATION

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FIRST NAME *	LAST NAME *	
<input type="text"/>	<input type="text"/>	
PHONE NUMBER *	FAX	TITLE
<input type="text"/>	<input type="text"/>	<input type="text"/>
EMAIL *	<input type="text"/>	

This should be the main person that will receive communications regarding activity for this account.

**IMPORTANT NOTE: Please do not set up more than one account unless you own or file tax returns for more than one company**

# Creating Your Account – Step by Step

STEP 7/8

## Certification

The gray boxes will contain your information and cannot be modified. Click the “Yes” checkbox and then Press the Submit button to create your account.

### CERTIFICATION

PLEASE COMPLETE THE INFORMATION BELOW.

REQUESTOR FULL NAME

LEGAL BUSINESS NAME

I certify and affirm that all information presented in this form is true and correct, that any documents I have presented to OLCC are genuine and that the information included in all supporting documentation is true and accurate. I make this certification and affirmation under penalty of perjury and I understand that knowingly making a false statement or representation on this form is a criminal violation.

BY CLICKING "YES" I AGREE WITH THE ABOVE STATEMENT \*  YES

**7**

**8**

**IMPORTANT NOTE: Please do not set up more than one account unless you own or file tax returns for more than one company**

# Creating Your Account – COMPLETE

STEP 9

## Account Information

This is account section. In MOST cases, you will only need to set up an account one time. A single account may hold multiple licenses. To learn how to associate licenses, please check out the License Association documentation or video located on the [OLCC Resource Page](#).

The screenshot displays a web application interface for managing accounts. At the top, a blue header bar contains the word "Accounts". Below this, a search bar with the placeholder "Type to search..." and a dropdown menu set to "Active" is visible. A list on the left shows "A TRAINING COMPANY" with an "Active" status indicator. The main content area shows the details for "A TRAINING COMPANY", including a crown icon for "PRIMARY CONTACT", the phone number "(555) 555-1212", and the email "Mister.Primary@training.com". The "ACCOUNT NUMBER" is "AC670090". A navigation bar below the contact info includes tabs for "Profile", "Address", "Files", "Contacts", "License", "Forms", and "Billing". The "Profile" tab is active, showing two sections: "ACCOUNT NAMES" and "ACCOUNT DETAILS". Each section has an "Edit" button with a pencil icon. The "ACCOUNT NAMES" section lists "LEGAL BUSINESS NAME" and "BUSINESS TRADE NAME", both set to "A TRAINING COMPANY". The "ACCOUNT DETAILS" section lists "ACCOUNT NUMBER" (AC670090), "PHONE NUMBER" ((555) 555-1212), "FAX NUMBER" ((555) 555-1313), and "WEBSITE" (https://TrainingCo.com). At the bottom left, it says "1 Record Found".

ACCOUNT NAMES	
LEGAL BUSINESS NAME	A TRAINING COMPANY
BUSINESS TRADE NAME	A TRAINING COMPANY

ACCOUNT DETAILS	
ACCOUNT NUMBER	AC670090
PHONE NUMBER	(555) 555-1212
FAX NUMBER	(555) 555-1313
WEBSITE	https://TrainingCo.com