

OPTO

Associating a License

Oregon Privilege Tax Online System

JUNE 2022

Associating a License – Helpful Tips

- You can associate one or more licenses to the same company.
- You do NOT need to create a single account per license.
- This is a license association of the license that you already hold. You are not receiving a new license, only associating your existing licenses in the OPTO system.
- When you submit your license, it will go to Pending Approval. At this status, you are done until OLCC approves the license.
- **REPEAT:** DO NOT create separate accounts in OPTO if you have/hold multiple licenses for a single company.

Associating a License – Step by Step

You must have a UserID and an account in OPTO to use this step-by-step guide.

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 Accounts and then Manage Accounts

The screenshot displays 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", "Accounts", "Create Account", and "Manage Accounts". The "Accounts" link is highlighted with a red circle containing the number "1". The "Manage Accounts" link in the dropdown menu is highlighted with a red circle containing the number "2". The dashboard content area shows three cards: "Start my next statement" with the message "Great job, you are all caught up!", "Filing in progress" with the message "Great job, you are all caught up!", and "Next statement due on" with a date of "06/20/2022". The bottom section shows a "Messages" table with columns for "Account", "From", "Date Sent", and "Message". The "Account" column has two entries: "Account" with a count of "0" and "License" with a count of "0".

Associating a License – Step by Step

STEP 3

Navigate to the License Tab

Click on the tab labeled, 'License'.

The screenshot displays a software 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 labeled "Active" is visible. A sidebar on the left lists "A TRAINING COMPANY" with an "Active" status indicator. The main content area shows the account details for "A TRAINING COMPANY" with a globe icon and a green "Active" badge. The account number is "AC670090". The primary contact information includes a phone number "(555) 555-1212" and an email address "Mister.Primary@training.com". A red circle with the number "3" highlights the "License" tab in the navigation menu. The "License" tab is currently selected, and the content area displays two sections: "ACCOUNT NAMES" and "ACCOUNT DETAILS". The "ACCOUNT NAMES" section shows "LEGAL BUSINESS NAME" and "BUSINESS TRADE NAME" both set to "A TRAINING COMPANY", with an "Edit" button. The "ACCOUNT DETAILS" section shows "ACCOUNT NUMBER" (AC670090), "PHONE NUMBER" ((555) 555-1212), "FAX NUMBER" ((555) 555-1313), and "WEBSITE" (https://TrainingCo.com), also with an "Edit" button. At the bottom left, it says "1 Record Found".

Accounts

Type to search... Active ▾

A TRAINING COMPANY Active

PRIMARY CONTACT ACCOUNT NUMBER AC670090

(555) 555-1212

Mister.Primary@training.com

3

Profile Address Filers Contacts License Forms ▾ Billing ▾

ACCOUNT NAMES Edit

LEGAL BUSINESS NAME A TRAINING COMPANY

BUSINESS TRADE NAME A TRAINING COMPANY

ACCOUNT DETAILS Edit

ACCOUNT NUMBER AC670090

PHONE NUMBER (555) 555-1212

FAX NUMBER (555) 555-1313

WEBSITE https://TrainingCo.com

1 Record Found

Associating a License – Step by Step

STEP 4

Click on Add License

STEP 5

Select the license type you hold (DS = Direct Shipper)

The screenshot shows the 'Accounts' management interface. At the top, there's a search bar and a dropdown menu set to 'Active'. Below this, a card for 'A TRAINING COMPANY' is visible, marked as 'Active'. The main content area shows the account details for 'A TRAINING COMPANY' with a globe icon and a green 'Active' status. The account number is AC670090. The primary contact is listed as (555) 555-1212 and Mister.Primary@training.com. A navigation bar includes tabs for Profile, Address, Filers, Contacts, License, Forms, and Billing. The 'License' tab is selected, showing a 'LICENSES' section with a search bar and a 'Show Secondary Licenses' checkbox. Below this, it states 'No Licenses Found'. On the right side, there is an 'Add License' button with a red circle '4' next to it. A dropdown menu is open, showing license types: BREWERY, BREWPUB, CERA, CERA Temp, DS (highlighted with a red circle '5'), WAREHOUSE, and WMBW.

REPEAT: If you already hold an account with associated licenses, and the Direct Shipper is for the same company, you can add additional licenses and should not create a new account for this new license.

Associating a License – Step by Step

STEP 6

Enter the License Information

Any fields that are marked with an asterisk are required. Enter the values for at least each required field. IF you have a TTB Basic Permit #, enter the number and then attach a PDF copy of the TTB Basic Permit #.

Create License Back to Account

LICENSE INFORMATION

LEGAL BUSINESS NAME *	BUSINESS TRADE NAME *	
<input type="text" value="A TRAINING COMPANY"/>	<input type="text" value="A TRAINING COMPANY"/>	
LICENSE TYPE *	OLCC LICENSE # *	OLCC PREMISES # *
<input type="text" value="DS"/>	<input type="text"/>	<input type="text"/>
TTB BASIC PERMIT #	TTB FILE UPLOAD	
<input type="text"/>	<input type="text" value="NO FILE CHOSEN"/> <input type="button" value="SELECT FILE"/>	
<input type="checkbox"/> CLICK THIS CHECKBOX IF LICENSE NAME IS THE SAME AS ACCOUNT LEGAL NAME		
LICENSE NAME *	LICENSE TRADE NAME *	
<input type="text"/>	<input type="text"/>	

HELPFUL TIPS

Fields with an asterisk are required.

When entering OLCC License # and/or OLCC Premises #, this is a six digit field. If you number is only 5 digits add a zero at the front.
EXAMPLE: Premises # 22445 should be entered as 022445

6

Associating a License – Step by Step

STEP 7 & 8

Physical and Mailing Address Information

For the license location, enter the information for the physical and mailing address. If the address is the same as the account, you can use the checkboxes to copy in the data to the form.

Create License [Back to Account](#)

PREMISES ADDRESS INFORMATION

CLICK THIS CHECKBOX IF THE LICENSE PREMISES ADDRESS IS THE SAME AS ACCOUNT'S PHYSICAL ADDRESS

ADDRESS 1 * ADDRESS 2

CITY * STATE * ZIP CODE *

COUNTRY *

MAILING ADDRESS INFORMATION

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

ADDRESS 1 * ADDRESS 2

CITY * STATE * ZIP CODE *

COUNTRY *

Associating a License – Step by Step

STEP 9, 10 and 11

Contact Information and Certification

For the Contact Information this should be someone that is located at the license address. Once data is all entered, click the Checkbox to confirm and then press Submit.

Create License [Back to Account](#)

CONTACT INFORMATION

9

FIRST NAME *

LAST NAME *

EMAIL *

PHONE NUMBER *

FAX NUMBER

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

10 **11**

Associating a License – COMPLETE

STEPS COMPLETE

Your license association is complete when it shows Pending Review status. **Congratulations!** You have completed the setup processes and are ready to file your returns when your license is approved. Please check out the DS Tax Return Creation documentation or video located on the [OLCC Resource Page](#).

The screenshot displays the 'Accounts' section of a software interface. At the top, a blue header bar contains the word 'Accounts'. Below this, a search bar with the placeholder 'Type to search...' and a filter dropdown set to 'Active' is visible. The main content area is for 'A TRAINING COMPANY', which is marked as 'Active' in a green pill. Contact information includes 'PRIMARY CONTACT', phone '(555) 555-1212', and email 'Mister.Primary@training.com'. The 'ACCOUNT NUMBER' is 'AC670090'. A navigation bar below the contact info includes tabs for 'Profile', 'Address', 'Filers', 'Contacts', 'License', 'Forms', and 'Billing'. The 'License' tab is selected, showing a 'LICENSES' section with an 'Add License' button. A search bar and a 'Show Secondary Licenses' checkbox are also present. A table lists one license: 'A TRAINING COMPANY DS' with a status of 'Pending Review' and a 'Last Modified' date of '06/14/2022'. A 'Privilege Tax ID' of 'PT1010440' is also shown. A red callout bubble points to the 'Pending Review' status with the text: 'ALL DONE! License will be reviewed by OLCC and someone will contact you when you are ready to file your returns!'. The text '1 Record Found' appears at the bottom of the license list and in the bottom left corner of the page.

Associating a License – 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](#).

Associating a License – 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](#).