

# OPTO

# Associating a License

Oregon Privilege Tax Online System

JANUARY 2024

# 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 an 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 multiple licenses within 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.**

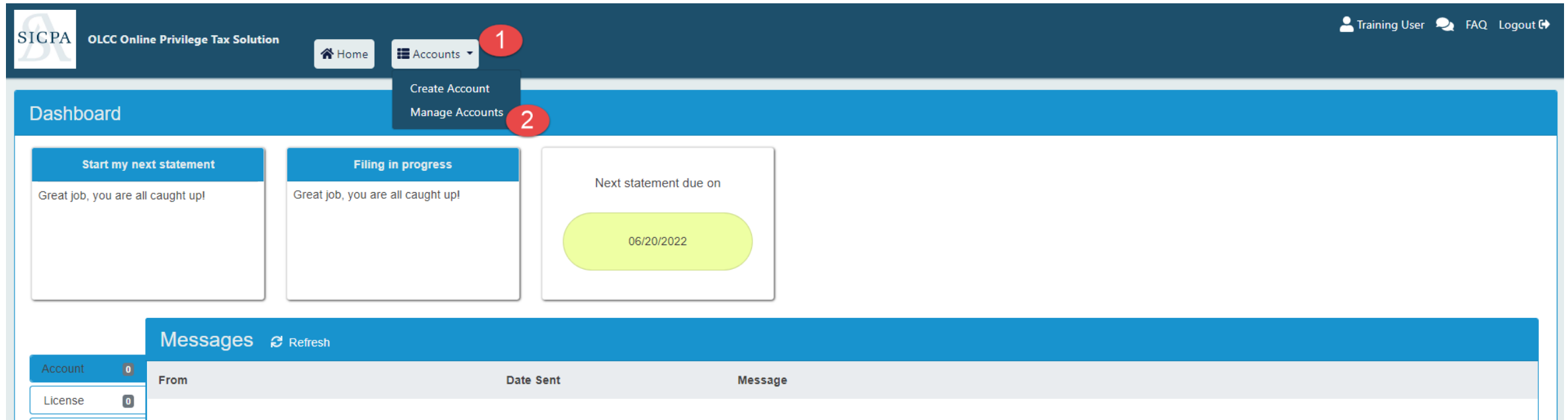
## STEP 1

**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**



SICPA OLCC Online Privilege Tax Solution

Home Accounts **1**

Create Account  
Manage Accounts **2**

Dashboard

**Start my next statement**  
Great job, you are all caught up!

**Filing in progress**  
Great job, you are all caught up!

Next statement due on  
06/20/2022

Messages Refresh

From	Date Sent	Message
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Account 0  
License 0

# Associating a License – Step by Step

## STEP 3

### Navigate to the License Tab

Click on the tab labeled, 'License'.

The screenshot shows a web application interface for managing accounts. On the left, a sidebar lists 'A TRAINING COMPANY' with an 'Active' status. The main content area is titled 'Accounts' and displays details for 'A TRAINING COMPANY'. A red circle with the number '3' highlights the 'License' tab in the navigation bar. The 'License' tab is currently selected, and a hand cursor is pointing at it. Below the navigation bar, the 'ACCOUNT NAMES' section shows 'LEGAL BUSINESS NAME' and 'BUSINESS TRADE NAME' both set to 'A TRAINING COMPANY'. The 'ACCOUNT DETAILS' section shows 'ACCOUNT NUMBER' as 'AC670090', 'PHONE NUMBER' as '(555) 555-1212', 'FAX NUMBER' as '(555) 555-1313', and 'WEBSITE' as 'https://TrainingCo.com'. The status 'Active' is shown in a green pill. At the bottom left, it says '1 Record Found'.

Accounts

Type to search... Active

A TRAINING COMPANY Active

A TRAINING COMPANY

PRIMARY CONTACT (555) 555-1212 Mister.Primary@training.com

ACCOUNT NUMBER AC670090

Active

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 (DTR = Direct to Retailer)**

Accounts

Type to search...

Active

A TRAINING COMPANY

Active

A TRAINING COMPANY

PRIMARY CONTACT

(555) 555-1212

Mister.Primary@training.com

ACCOUNT NUMBER

AC670090

Active

ProfileAddressFiltersContactsLicenseFormsBilling

LICENSES

Type to search...

SearchFilter

☐ Show Secondary Licenses

4

Add License

BREWERY

BREW PUB

CERA

CERA Temp

DS

DTR

5

GSP

RETAILER

UNLICENSED ENTITY

VINEYARD

WAREHOUSE

WINERY

WMBW

1 Record Found

**REPEAT: If you already hold an account with associated licenses, and the Direct to Retailer license 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 #.

#### LICENSE INFORMATION

LEGAL BUSINESS NAME *		BUSINESS TRADE NAME *	
<input type="text" value="This is My Training Company"/>		<input type="text" value="This is My Training Company"/>	
LICENSE TYPE *	OLCC LICENSE # *	OLCC PREMISES # *	
<div>6</div> <input type="text" value="DTR"/>	<input type="text"/>	<input type="text"/>	
TTB BASIC PERMIT # *	TTB FILE UPLOAD *		
<input type="text"/>	<div><div>NO FILE CHOSEN</div><div>SELECT FILE</div></div>		
<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

# 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

7

☐ 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 \*

United States of America

MAILING ADDRESS INFORMATION

8

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

ADDRESS 1 \*

ADDRESS 2

CITY \*

STATE \*

ZIP CODE \*

COUNTRY \*

United States of America

# 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

Training User

LEGAL BUSINESS NAME

A TRAINING COMPANY

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

Submit

Cancel



# 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 DTR Tax Return Creation documentation or video located on the [OLCC Resource Page](#).

The screenshot displays the 'This is My Training Company' web application interface. At the top, there is a search bar and a status indicator 'Active'. The main header shows the company name 'This is My Training Company' with a globe icon and the account number 'AC160140'. Below the header, there are tabs for 'Profile', 'Address', 'Filers', 'Contacts', 'License', 'Forms', and 'Billing'. The 'License' tab is selected, showing a list of licenses. A single license is listed with the status 'Pending Review'. A red callout bubble points to the 'Pending Review' status, indicating that the license is ready for review.

**Active**

**This is My Training Company** **Active**

**ACCOUNT NUMBER** AC160140

**LICENSES** **Add License**

Type to search... **Clear** ☐ Show Secondary Licenses **Expand All**

<b>This is My Training Company</b> DTR	<b>This is My Training Company</b>	Last Modified: 12/07/2023 Privilege Tax ID: PT261750	<b>Pending Review</b>
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1 Record Found

**ALL DONE!** License will be reviewed by OLCC and someone will contact you when you are ready to file your returns!