

# OPTO

# Associating a License

Oregon Privilege Tax Online System

NOVEMBER 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 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.
- **IMPORTANT NOTE:** To file an OWB return, you will use the OWB associated Number within the GSP License. Example: GSP License = PT999111 and OWB auto generated Number = OWB999111

# 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 main sections: "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". At the bottom, there is a "Messages" section with a "Refresh" button and a table with columns for "Account", "License", "From", "Date Sent", and "Message". The "Account" and "License" filters show 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 shows a list of accounts, with "A TRAINING COMPANY" selected and marked as "Active". The main content area shows the details for "A TRAINING COMPANY", including a "PRIMARY CONTACT" with phone number "(555) 555-1212" and email "Mister.Primary@training.com", and an "ACCOUNT NUMBER" of "AC670090". 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 "ACCOUNT NAMES" and "ACCOUNT DETAILS" sections, each with an "Edit" button. The "ACCOUNT NAMES" section shows "LEGAL BUSINESS NAME" and "BUSINESS TRADE NAME" both as "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". 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

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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 (GSP = Grower Sales Privilege)

The screenshot displays the 'Accounts' section of the OPTO system. The account 'A TRAINING COMPANY' is selected, showing its details and a list of licenses. The 'License' tab is active, and the 'Add License' button is highlighted with a red circle and the number 4. A dropdown menu is open, showing various license types, with 'GSP' highlighted by a red circle and the number 5. The dropdown menu includes the following options: BREWERY, BREWPUB, CERA, CERA Temp, DS, GSP, UNLICENSED ENTITY, VINEYARD, WAREHOUSE, WINERY, WMBW, and WSD. The account details include 'PRIMARY CONTACT' information and 'ACCOUNT NUMBER AC670090'. The 'LICESSES' section shows a search bar and a 'Show Secondary Licenses' checkbox. The text 'No Licenses Found' is displayed below the search bar. The bottom of the page indicates '1 Record Found'.

**IMPORTANT!! If you already have an account in OPTO with associated licenses, and the GSP license is for the same company, you can add this additional license 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.

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="GSP"/>   | <input type="text"/>                            | <input type="text"/> |
| <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

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# Associating a License – Step by Step

STEP 7 & 8

## Premises and Mailing Address Information

For the license location, enter the information for the premises 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](#)

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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.

The screenshot displays a software interface for account management. At the top, a blue header reads 'Accounts'. Below it, a search bar contains 'Type to search...' and an 'Active' filter. The main content area shows details for 'A TRAINING COMPANY' with a green 'Active' status. Contact information includes a primary contact, phone number (555) 555-1212, and email Mister.Primary@training.com. The account number is AC670090. A navigation bar includes tabs for Profile, Address, Filers, Contacts, License, Forms, and Billing. The 'License' tab is active, showing a table of licenses. The table has one entry: 'A TRAINING COMPANY GSP' with a status of 'Pending Review'. A callout bubble points to this status with the text: 'When you see Pending Review status, you are all done with license association!'. The interface also includes an 'Add License' button, a search bar for licenses, and a 'Show Secondary Licenses' checkbox.

| LICENSES               |                    | Add License  |                |
|------------------------|--------------------|--|----------------|
| Type to search...      |                    | Show Secondary Licenses                                  |                |
| A TRAINING COMPANY GSP | A TRAINING COMPANY | Last Modified: 11/19/2022<br>Privilege Tax ID: PT1051090 | Pending Review |

1 Record Found

# Associating a License – Final Thoughts

- Please check out the FAQ's for your license type available here : [OLCC Resource Page](#).
- Need Help? If you are not sure of the process, data required or how to answer the licensing questions ,

**STOP! DO NOT SUBMIT YOUR LICENSE ASSOCIATION**

Email your question to the privilege tax team at:

[OLCC.HelpDeskPrivilegeTax@oregon.gov](mailto:OLCC.HelpDeskPrivilegeTax@oregon.gov)

