OPTO
Associating a License

Oregon Privilege Tax Online System

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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

Associating a License – Step by Step

Navigate to the License Tab
Click on the tab labeled, 'License'.

Associating a License – Step by Step

Click on Add License

Select the license type you hold (Retailer)

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

Associating a License – Step by Step

Enter the License Information
Any fields that are marked with an asterisk are required. Enter the values for at least each required field. Use the checkbox if the information for the license is the same as the name of your Account (company).

Associating a License – Step by Step

Premises 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.

Associating a License – Step by Step

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.

Associating a License – 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 Retailer Tax Return Creation documentation located on the OLCC Resource Page.