

# 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

Account	From	Date Sent	Message
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 displays a software interface for managing accounts. At the top, a blue header bar contains the word "Accounts". Below this, a search bar with a magnifying glass icon and the text "Type to search..." is visible, along with a dropdown menu labeled "Active".

The main content area is divided into two sections. On the left, a blue sidebar lists "Retailer Training Company" with a green "Active" status indicator. On the right, the account details for "Retailer Training Company" are shown, including a green "Active" status indicator, a crown icon, the name "Training Training", the phone number "(555) 555-1212", the email address "training.user@training.com", and the account number "AC270160".

Below the account details, a horizontal navigation bar contains several tabs: "Profile", "Address", "Filers", "Contacts", "License", "Forms", and "Billing". The "License" tab is currently selected and highlighted in white, with a red circle containing the number "3" above it. To the right of the tabs is a blue button labeled "Add License".

Underneath the navigation bar, the "LICENSES" section is displayed. It features a search bar with the text "Type to search...", a magnifying glass icon, and a funnel icon. To the right of the search bar is a checkbox labeled "Show Secondary Licenses". Below the search bar, the text "No Licenses Found" is centered.

# Associating a License – Step by Step

STEP 4

Click on Add License

STEP 5

Select the license type you hold (Retailer)

The screenshot displays the 'Accounts' interface for 'Retailer Training Company'. The account is active, with account number AC270160. The 'License' tab is selected in the navigation bar. Below the navigation bar, there is a search bar and a 'Show Secondary Licenses' checkbox. The main area shows 'No Licenses Found'. A red circle with the number 4 highlights the 'Add License' button. A dropdown menu is open, showing a list of license types: BREWERY, BREWPUB, CERA, CERA Temp, DS, DTR, GSP, RETAILER (highlighted with a red circle and the number 5), UNLICENSED ENTITY, VINEYARD, WAREHOUSE, WINERY, and WMBW. The left sidebar shows 'Retailer Training Company' as the selected account. The bottom left corner indicates '1 Record Found'.

**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 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. Use the checkbox if the information for the license is the same as the name of your Account (company).

Create License Back to Account

LICENSE INFORMATION

LEGAL BUSINESS NAME *	BUSINESS TRADE NAME *	
<input type="text" value="Retailer Training Company"/>	<input type="text" value="Retailer Training Company"/>	
LICENSE TYPE *	OLCC LICENSE # *	OLCC PREMISES # *
<input type="text" value="RETAILER"/>	<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 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

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**PREMISES ADDRESS INFORMATION**

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

**7**

ADDRESS 1 \* ADDRESS 2

CITY \* STATE \* ZIP CODE \*

COUNTRY \*

United States of America

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**MAILING ADDRESS INFORMATION**

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

**8**

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

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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.

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

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

The screenshot displays the 'Accounts' page for 'Retailer Training Company'. The account is marked as 'Active'. The 'License' tab is selected, showing a table with one license record. The record is for 'Retailer Training Company RETAILER' and is in 'Pending Review' status. 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!'.

Accounts

Search: Type to search... Active

Retailer Training Company Active

Training Training ACCOUNT NUMBER AC270160  
(555) 555-1212  
training.user@training.com

Profile Address Filers Contacts License Forms Billing

LICENSES Add License

Type to search... Show Secondary Licenses Expand All

Retailer Training Company RETAILER	Retailer Training Company	Last Modified: 12/13/2023 Privilege Tax ID: PT261940	Pending Review
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1 Record Found

1 Record Found

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