OPTO Associating a License

Oregon Privilege Tax Online System
JULY 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 <u>accounts</u> in OPTO if you have multiple licenses within a single company.
- <u>IMPORTANT NOTE</u>: To file an OWB return, you will use the OWB associated Number within the Winery License. Example: Winery License = PT999111 and OWB auto generated Number = OWB999111

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

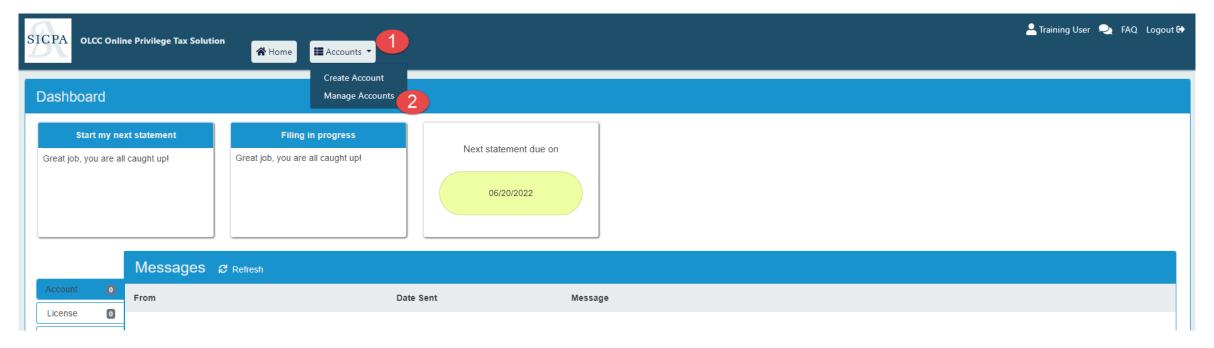
STEP 1

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

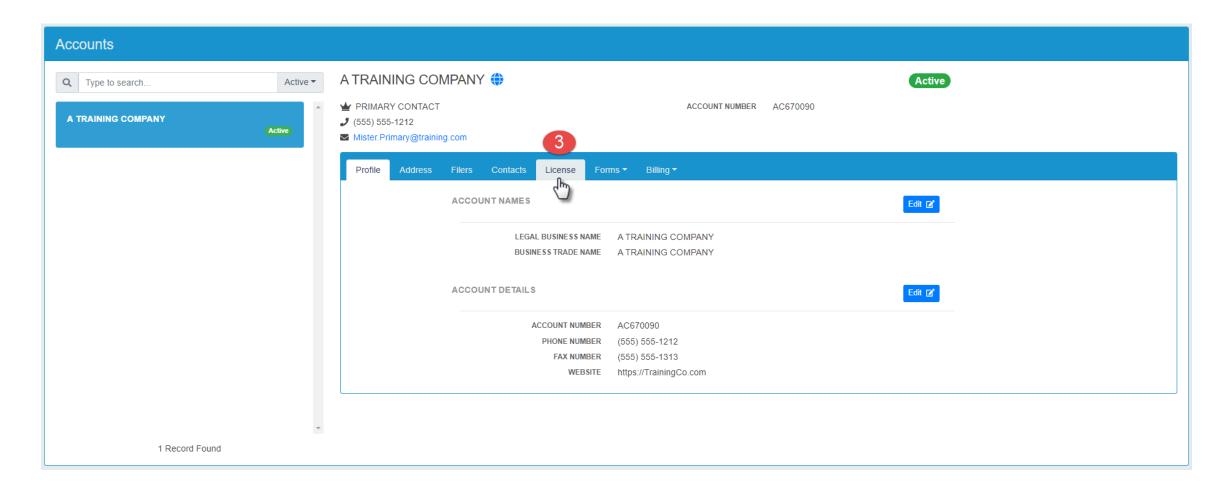
From Dashboard, Click on Accounts and then Manage Accounts



STEP 3

Navigate to the License Tab

Click on the tab labeled, 'License'.

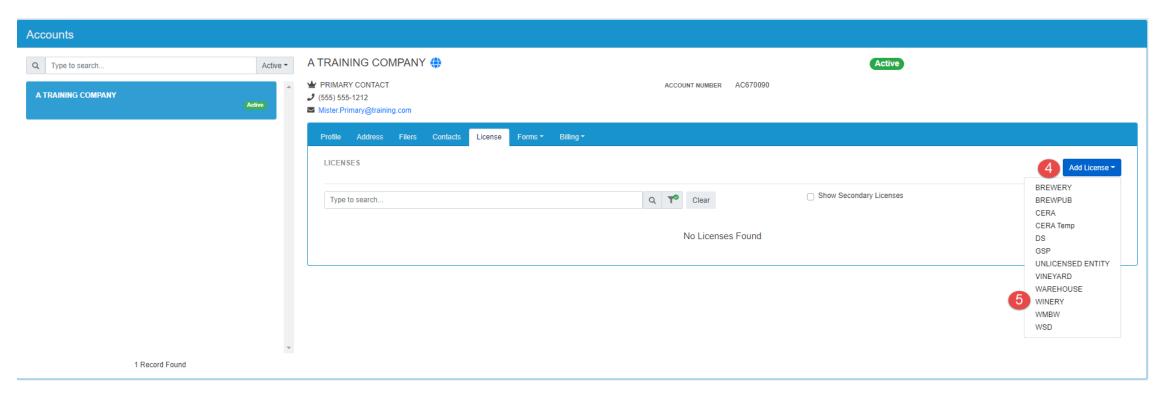


STFP 4

Click on Add License

STEP 5

Select the license type you hold

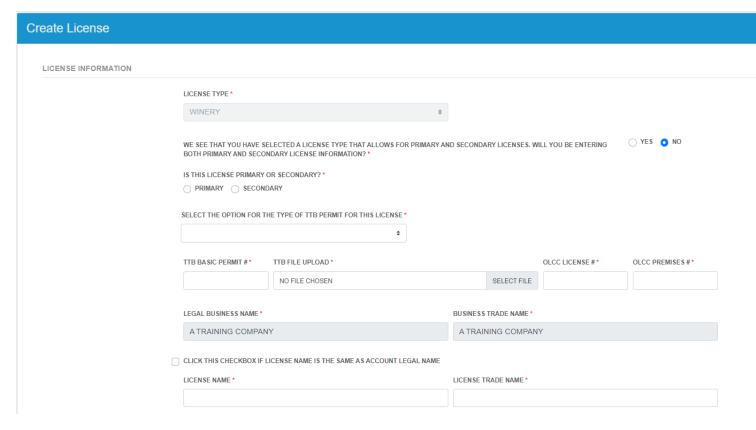


NOTE: If you already have an account with associated licenses, and the new license you are requesting is for the same company, you do not create a new account for this new license. Use your existing account!

STEP 6

Enter the License Information

Any fields that are marked with an asterisk are required.

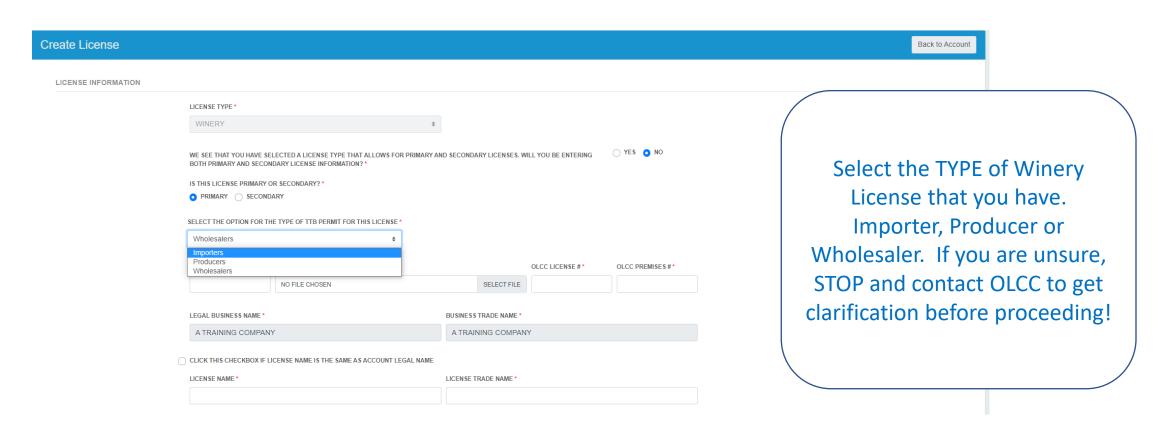


IF your winery has both primary and secondary locations, select "Yes" to the first question to add all locations at the same time. If you only have one location, select "No" and then select "Primary" to start the license association for your single location

STEP 6 (continued)

Enter the License Information

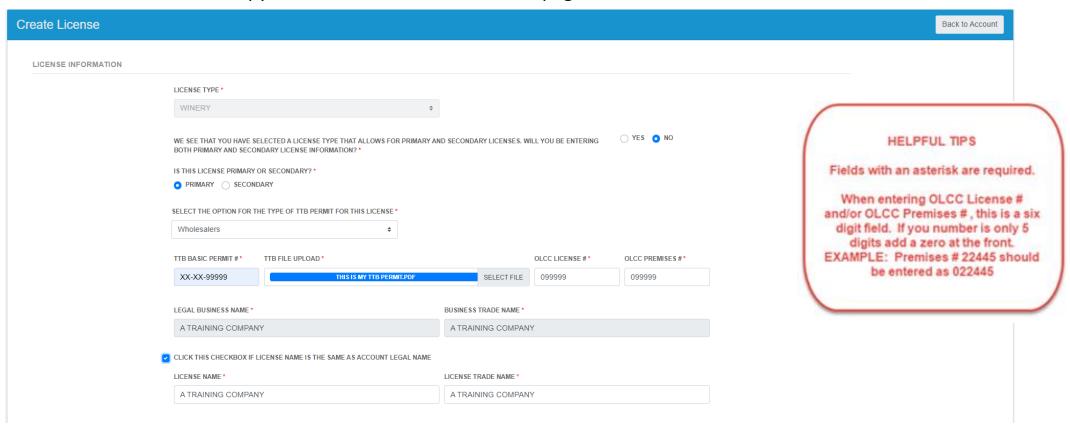
Any fields that are marked with an asterisk are required. Select the TYPE of Winery License that you hold.



STEP 6 (continued)

Enter the License Information

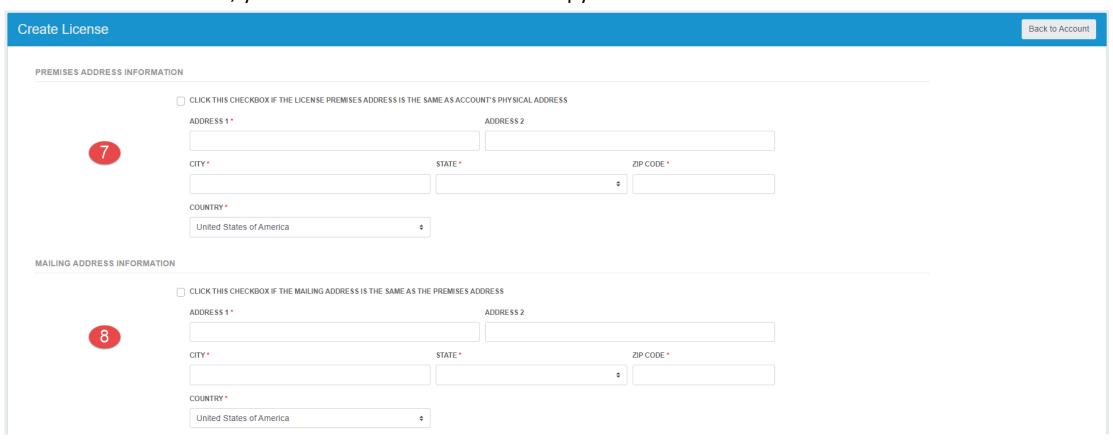
Enter the TTB Information for the license you are associating. Attach the PDF of your TTB Basic permit. Then enter your OLCC License # and Premises Number. If your license and license trade name are the same as your account name, you can use the checkbox to copy that information to the license page.



STEP 7 & 8

Physical and Mailing Address Information

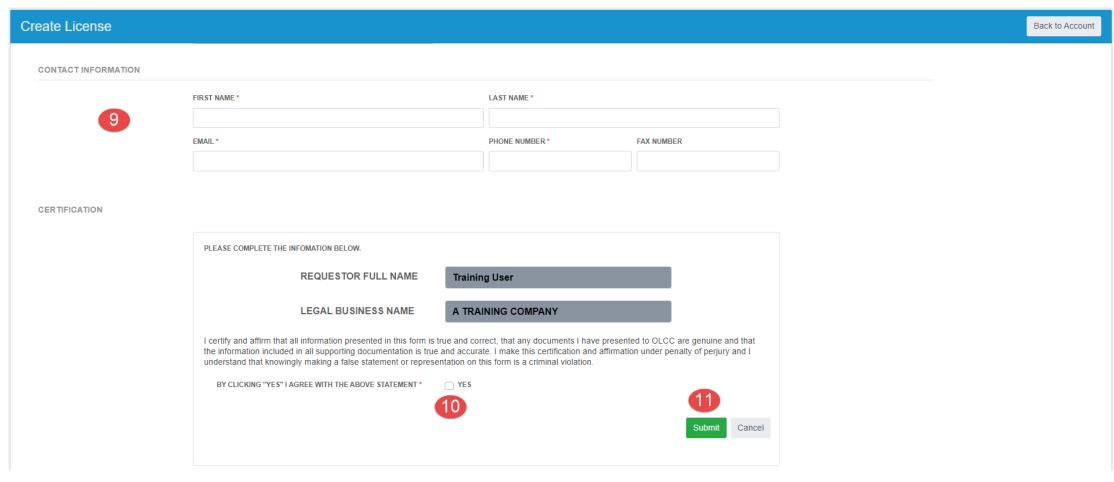
For the license location, enter the information for the physical and mailing address. If the address is the same as the account, you can use the checkboxes to copy in the data to the form.



STEP 9, 10 and 11

Contact Information and Certification

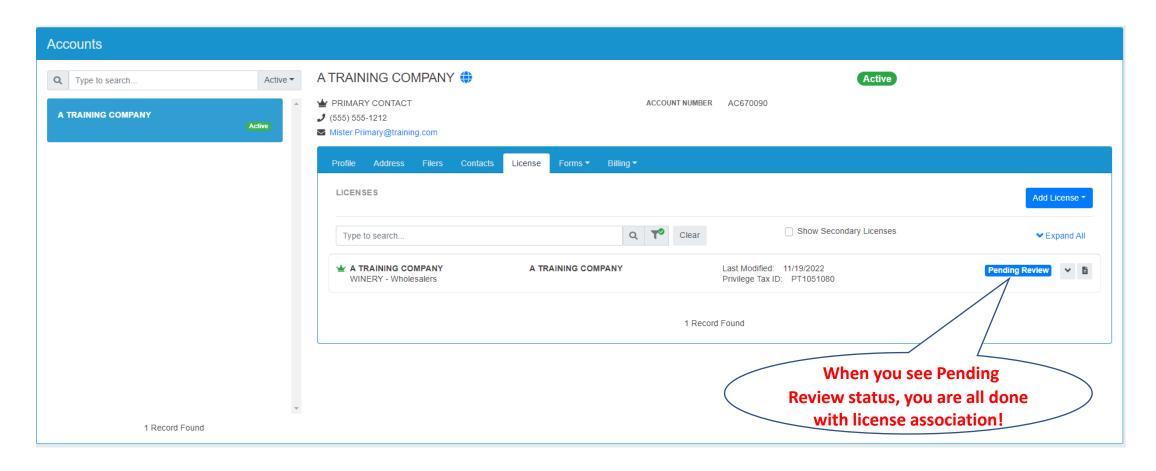
For the Contact Information this should be someone that is located at the license address. Once data is all entered, click the Checkbox to confirm and then press Submit.



Associating a License – COMPLETE

STEPS COMPLETE

Your license association request is complete when it shows Pending Review status. **Congratulations!** You have completed the setup process and are ready to file your returns once your license is approved.



Associating a License – Final Thoughts

- Please check out the FAQ's for your license type available here: <u>OLCC Resource Page</u>.
- 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

