

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 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 Winery License. Example: Winery 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, and a dropdown menu. A red circle with the number "1" highlights the "Accounts" link. The dropdown menu is open, showing "Create Account" and "Manage Accounts", with a red circle and the number "2" highlighting "Manage Accounts". The dashboard content area features three cards: "Start my next statement" with the message "Great job, you are all caught up!", "Filing in progress" with the same message, and "Next statement due on" with a date of "06/20/2022" in a yellow rounded rectangle. At the bottom, there is a "Messages" section with a "Refresh" button and a table with columns for "From", "Date Sent", and "Message". On the left side, there are two notification boxes: "Account" with a count of "0" and "License" with 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 set to "Active" is visible. A sidebar on the left lists "A TRAINING COMPANY" with an "Active" status indicator. The main content area shows the account details for "A TRAINING COMPANY" with a globe icon and an "Active" status badge. The account number is AC670090. The primary contact information includes a phone number (555) 555-1212 and an email address Mister.Primary@training.com. 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 two sections: "ACCOUNT NAMES" and "ACCOUNT DETAILS". Each section has an "Edit" button with a pencil icon. The "ACCOUNT NAMES" section shows the legal business name and business trade name as "A TRAINING COMPANY". The "ACCOUNT DETAILS" section shows the account number, phone number, fax number, and website.

Accounts

Type to search... Active ▾

A TRAINING COMPANY **Active**

ACCOUNT NUMBER AC670090

PRIMARY CONTACT

(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

The screenshot shows a software interface for managing accounts. The main header is 'Accounts'. Below it, there is a search bar and a dropdown menu set to 'Active'. The main content area displays 'A TRAINING COMPANY' with a globe icon and an 'Active' status. Below this, there are contact details: 'PRIMARY CONTACT', '(555) 555-1212', and 'Mister.Primary@training.com'. The 'ACCOUNT NUMBER' is 'AC670090'. A navigation bar includes 'Profile', 'Address', 'Filers', 'Contacts', 'License', 'Forms', and 'Billing'. The 'License' tab is selected, showing a 'LICENSES' section with a search bar and a 'Show Secondary Licenses' checkbox. The search results show '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, GSP, UNLICENSED ENTITY, VINEYARD, WAREHOUSE, WINERY, WMBW, and WSD. A red circle with the number '5' highlights the 'WINERY' option.

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!

Associating a License – Step by Step

STEP 6

Enter the License Information

Any fields that are marked with an asterisk are required.

Create License

LICENSE INFORMATION

LICENSE TYPE *
WINERY

WE SEE THAT YOU HAVE SELECTED A LICENSE TYPE THAT ALLOWS FOR PRIMARY AND SECONDARY LICENSES. WILL YOU BE ENTERING BOTH PRIMARY AND SECONDARY LICENSE INFORMATION? * YES NO

IS THIS LICENSE PRIMARY OR SECONDARY? *
 PRIMARY SECONDARY

SELECT THE OPTION FOR THE TYPE OF TTB PERMIT FOR THIS LICENSE *
[Dropdown]

TTB BASIC PERMIT # * TTB FILE UPLOAD * OLCC LICENSE # * OLCC PREMISES # *

[Text] NO FILE CHOSEN SELECT FILE [Text] [Text]

LEGAL BUSINESS NAME * BUSINESS TRADE NAME *

A TRAINING COMPANY A TRAINING COMPANY

CLICK THIS CHECKBOX IF LICENSE NAME IS THE SAME AS ACCOUNT LEGAL NAME

LICENSE NAME * LICENSE TRADE NAME *

[Text] [Text]

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

Associating a License – Step by Step

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.

Create License Back to Account

LICENSE INFORMATION

LICENSE TYPE *
WINERY

WE SEE THAT YOU HAVE SELECTED A LICENSE TYPE THAT ALLOWS FOR PRIMARY AND SECONDARY LICENSES. WILL YOU BE ENTERING BOTH PRIMARY AND SECONDARY LICENSE INFORMATION? * YES NO

IS THIS LICENSE PRIMARY OR SECONDARY? *
 PRIMARY SECONDARY

SELECT THE OPTION FOR THE TYPE OF TTB PERMIT FOR THIS LICENSE *
Wholesalers
Importers
Producers
Wholesalers

OLCC LICENSE # * OLCC PREMISES # *
NO FILE CHOSEN SELECT FILE

LEGAL BUSINESS NAME * BUSINESS TRADE NAME *
A TRAINING COMPANY A TRAINING COMPANY

CLICK THIS CHECKBOX IF LICENSE NAME IS THE SAME AS ACCOUNT LEGAL NAME

LICENSE NAME * LICENSE TRADE NAME *

Select the TYPE of Winery License that you have. Importer, Producer or Wholesaler. If you are unsure, STOP and contact OLCC to get clarification before proceeding!

Associating a License – Step by Step

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.

Create License Back to Account

LICENSE INFORMATION

LICENSE TYPE *
WINERY

WE SEE THAT YOU HAVE SELECTED A LICENSE TYPE THAT ALLOWS FOR PRIMARY AND SECONDARY LICENSES. WILL YOU BE ENTERING BOTH PRIMARY AND SECONDARY LICENSE INFORMATION? * YES NO

IS THIS LICENSE PRIMARY OR SECONDARY? *
 PRIMARY SECONDARY

SELECT THE OPTION FOR THE TYPE OF TTB PERMIT FOR THIS LICENSE *
Wholesalers

TTB BASIC PERMIT # * TTB FILE UPLOAD * OLCC LICENSE # * OLCC PREMISES # *

XX-XX-99999 THIS IS MY TTB PERMIT.PDF SELECT FILE 099999 099999

LEGAL BUSINESS NAME * BUSINESS TRADE NAME *
A TRAINING COMPANY A TRAINING COMPANY

CLICK THIS CHECKBOX IF LICENSE NAME IS THE SAME AS ACCOUNT LEGAL NAME

LICENSE NAME * LICENSE TRADE NAME *
A TRAINING COMPANY A TRAINING COMPANY

HELPFUL TIPS

Fields with an asterisk are required.

When entering OLCC License # and/or OLCC Premises #, this is a six digit field. If your 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

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

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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.

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

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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.

The screenshot displays a software interface for managing accounts. The main header is 'Accounts'. On the left, there is a search bar and a list of accounts, with 'A TRAINING COMPANY' selected and marked as 'Active'. The main content area shows the profile for 'A TRAINING COMPANY' with contact information and account number AC670090. The 'License' tab is active, showing a table of licenses. One license is listed with the status '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!'.

Accounts

Search: 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

LICENSES Add License

Type to search... Show Secondary Licenses Expand All

A TRAINING COMPANY WINERY - Wholesalers	A TRAINING COMPANY	Last Modified: 11/19/2022 Privilege Tax ID: PT1051080	Pending Review
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1 Record Found

1 Record Found

When you see Pending Review status, you are all done with license association!

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

