# OPTO Creating Your Supplier List

Oregon Privilege Tax Online System
JANUARY 2024

## Supplier Lists – Helpful Tips

- You can only associate companies that have created their account and hold a DTR (Direct to Retailer) license in Oregon.
- You only need to add this list ONE TIME, <u>not every month</u> when you want to file your return!
- You can add or remove suppliers any time you need to.
- Keeping your supplier list up to date will make your monthly tax filing more efficient.

## Create Your Supplier List — Step by Step

You must have a UserID, Account and **ACTIVE** license in OPTO to use this step-by-step guide.

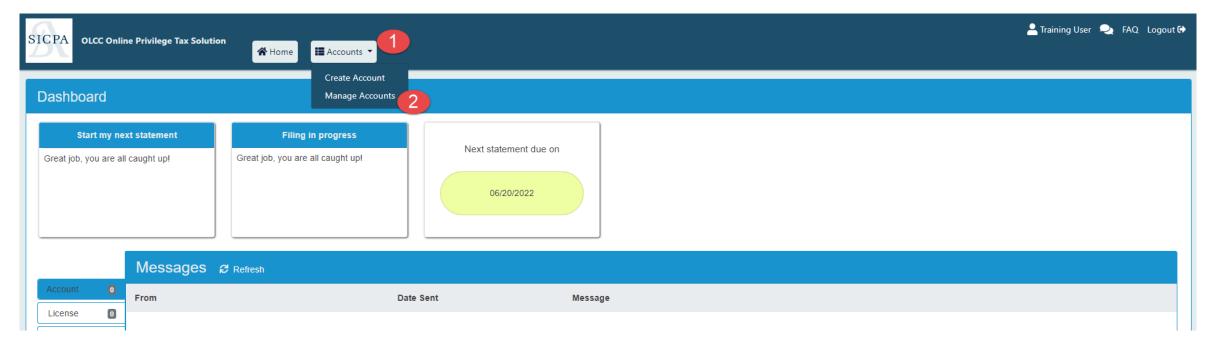
STEP 1

Login to Oregon Privilege Tax System <a href="https://or.setsonline.com">https://or.setsonline.com</a>

If you are unsure or do not have a login, please refer to the Creating your userID document.

STEP 2

From Dashboard, Click on Accounts and then Manage Accounts



# Create Your Supplier List — Step by Step

STEP 3

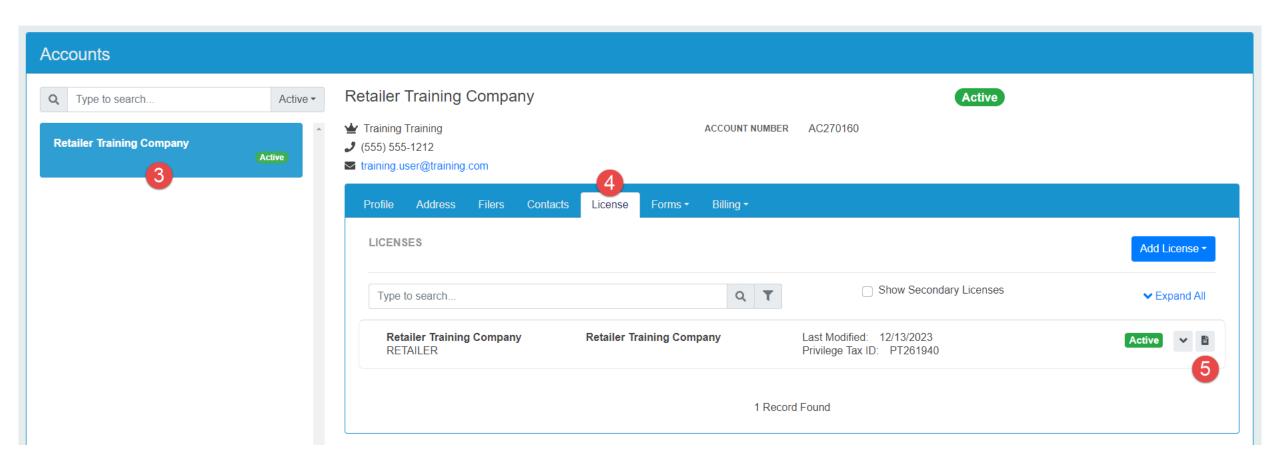
If you have more than one account Click on the correct account.

STEP 4

**Click on License Tab** 

STEP 5

On the Retailer license record, click on the View Details icon.



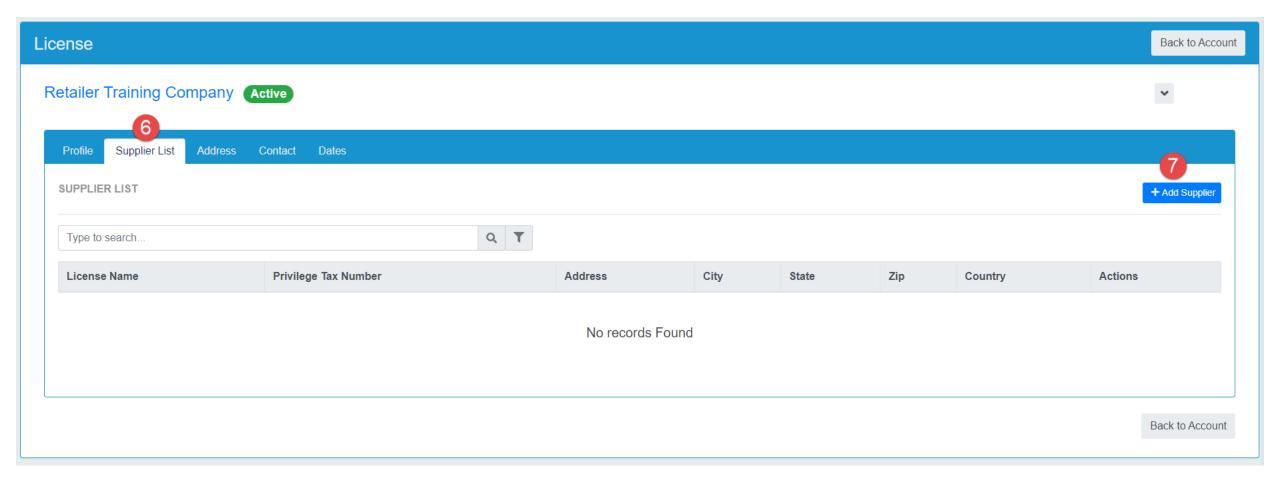
# Create Your Supplier List — Step by Step

STEP 6

Click on tab called "Supplier List"

STEP 7

Click "+ Add Supplier" button to add one of the companies you receive product from (aka supplier)



## Create Your Supplier List—Step by Step

STEP 8

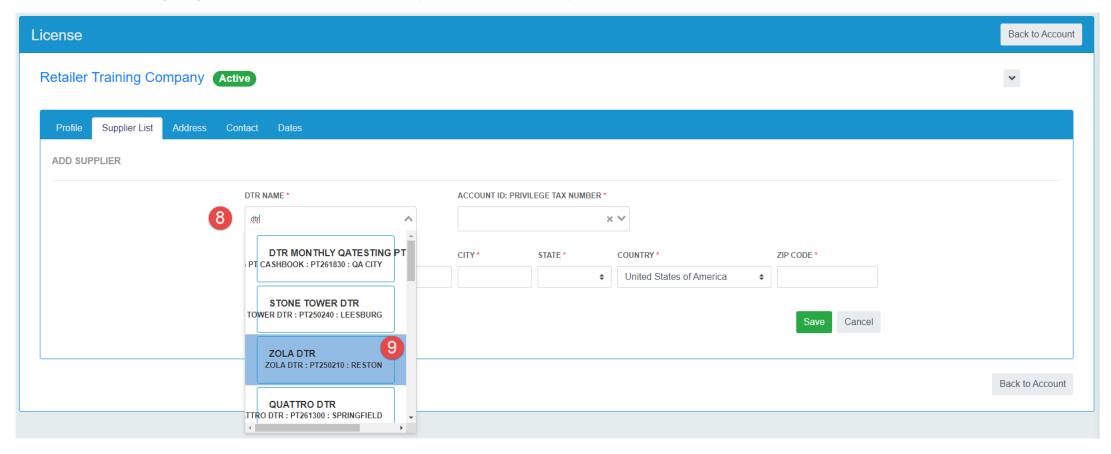
#### **Enter the name of DTR**

Start typing the name of the company that you receive product from. This company must be a licensed DTR (Direct to Retailer)

STEP 9

### Select the company by clicking on it

Click on the name of the DTR that is your supplier.

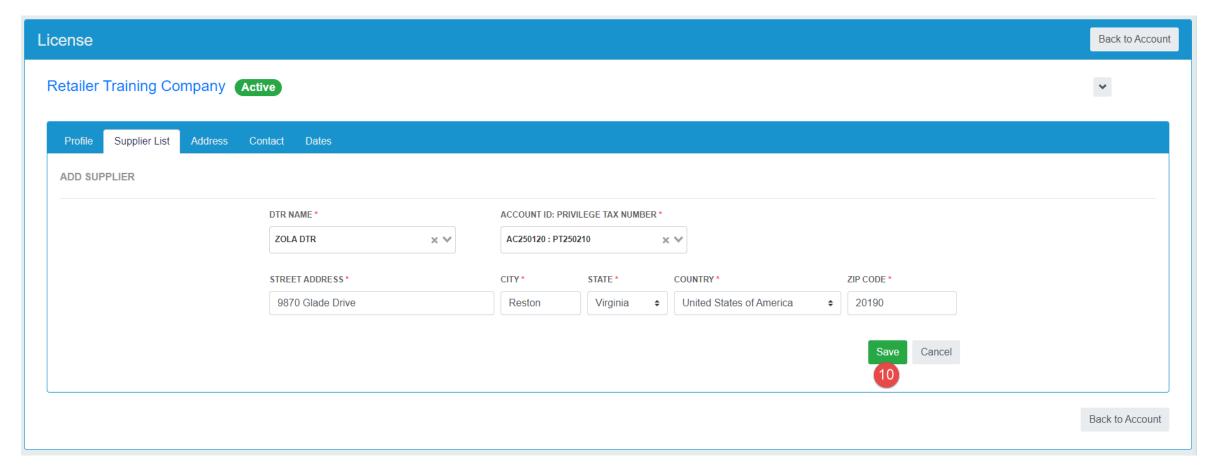


## Create Your Supplier List – Step by Step

STEP 10

## Verify and then Save

Once you click on the company name for the DTR that is your supplier, the address information will be populated automatically for you. Before clicking Save, verify that the address is correct. If it is not, then go back to the "Name" field and re-type the company name and find the correct Direct to Retail company.



## Create Your Supplier List – Complete!

STEPS COMPLETE!

## **Verify List – Ready to Start your Return!**

Continue to "+ Add Supplier" steps 7 thru 10 until all of your suppliers appear in the list. Verify the information and if the list is correct then you are ready to start your tax return!

