TAX SYSTEMS

AlphaVAT

Entity Management Guide

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Contents

1. Introduction

About this guide

This document provides an overview of the Entity management features available, including:

- The Entity management screen
- User menu options
- How to view and manage notifications
- How to view and manage alerts

Version control

This user guide was last updated as follows:

Date	Summary of changes
08/09/22	New template applied.

Technical support

We provide a technical support help desk for users requiring assistance. The help desk can be contacted by telephone between the hours of 9.00 am and 5.30 pm, Monday to Friday excluding public holidays.

If you require help or further information, please contact the support team on:		
UK	Tel: +44 (0) 1784 777 666	Email: support@taxsystems.com
Ireland	Tel: +353 (0) 1661 9976	Email: support@taxsystems.ie

2. Entity management overview

AlphaVAT provides a range of features to help you create and manage your entities. The Entity management screen enables you to:

- Create your folder structure (if you have the appropriate user role assigned to you)
- Create and manage your entities
- View and manage your user notifications and alerts
- Access the user menu
- Use the status column options to authorise your entity and prepare, review, and submit your entity's VAT Return.

What is an entity?

An entity is a sole trader incorporated company or other organisations such as trusts, charities, and public bodies (for example, NHS trusts, government departments and local authorities).

What is the single entity feature?

The single entity feature allows you to create an individual entity that requires the preparation of one VAT Return per obligation. For more information, please refer to the **Single Entities Guide**.

What is the group entity feature?

The group entity feature allows you to establish a group, where there will be one representative member and a number of group members.

The group members will be able to prepare their individual VAT Returns. Once this has been done, the representative member will be able to consolidate the group VAT Returns and into a single VAT Return that can be submitted to HMRC on behalf of the group.

The group entity feature is only available to customers who have an AlphaVAT licence. For more information, please refer to the **Group Entities Guide**.

What is the demo entity feature?

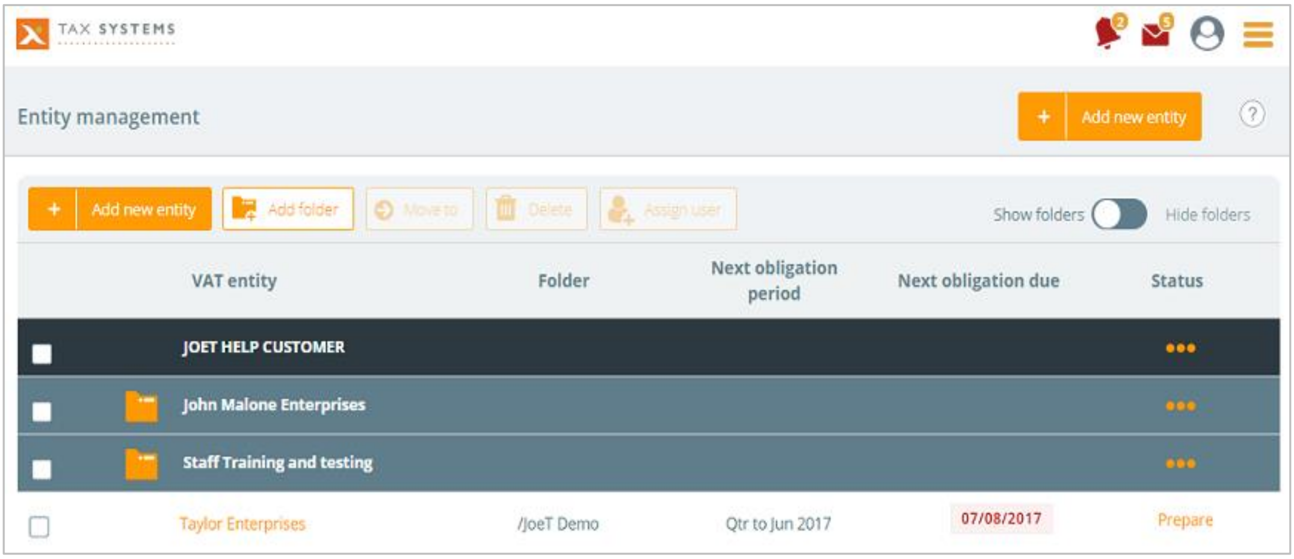
The demo entity feature allows you to experience the end to end process of digitally submitting a VAT Return for a **single entity** within a simulation environment, using data that we have provided. You can use this simulation to familiarise yourself with the system and try out functionality, without the need to actually submit a real VAT Return.

Using this feature will not generate an actual test submission to HMRC's APIs, since they have not provided a way to do this in their live environment. For more information, please refer to the **Demo Entities Guide**.

3. The Entity management screen

The **Entity management** screen displays the folders and entities that you have access to and allows you to perform the following tasks, depending on the **User Role** you have been assigned:

- View the user menu
- View your account details
- View/manage notifications
- View/manage alerts
- Add a new entity
- Add a new folder
- Edit folder details
- Move a folder or entity
- Delete a folder or entity
- Assign access to a user for a folder or entity
- Toggle the folders on or off
- View an entity's details
- Authorise an entity
- Prepare your entity's VAT Return
- Review and submit your entity's VAT Return



Entity information displayed

The Entity management screen displays the following information for each entity that you create:

- **VAT entity:** Displays the name of the entity.
- **Folder:** Displays the folder name that the entity resides in.
- **Next obligation period:** Displays the date range of the next obligation period for an entity.
- **Next obligation due:** Provides the date of when the next obligation is/was due.
- **Status:** Displays the next task that is due for the entity's obligation shown.

	VAT entity	Folder	Next obligation period	Next obligation due	Status
	JOET DEMO				Edit folder
	Taylor Enterprises	/JoeT Demo	Qtr to Jun 2017	07/08/2017	Prepare

You can sort your entities via each of these headings when you have switched the toggle to hide folders. Simply click on the **double arrow** to the left of each heading.

+ Add new entity | Add folder | Move to | Delete | Assign user | Show folders | Hide folders

	VAT entity	Folder	Next obligation period	Next obligation due	Status
	Joe Test 5	/Staff Training and development	Qtr to Jun 2017	07/08/2017	Prepare
	Joe test 2	/Malone Trading	Qtr to Feb 2018	07/04/2018	Prepare
	Joe Test 3	/Staff Training and development	Qtr to Feb 2018	07/04/2018	Prepare
	Joe Test 4	/Staff Training and development	Qtr to Mar 2018	07/05/2018	Prepare

The next obligation due column

This column will display the date of when the entity's next obligation is/was due:

- **No date displayed**: If there is no obligation date shown, this either indicates that your entity has not yet been authorised or that the next obligation is not yet available.
- **Date displayed**: Indicates that your next obligation is available and ready for you to action.
- **Date displayed in red**: Indicates that your obligation requires urgent action.

	VAT entity	Folder	Next obligation period	Next obligation due	Status
	JOET HELP CUSTOMER				•••
	Joe Test 4	/Staff Training and testing	Qtr to Mar 2018	07/05/2018	Prepare
	Joe Test 8	/Staff Training and testing	Qtr to Jul 2019	07/09/2019	Prepare
	Joe test	/Staff Training and testing			Prepare

The status column

The status column displays the next task that is due for the entity or its current obligation and will be one of the following, depending on the tasks you have already completed.

	VAT entity	Folder	Next obligation period	Next obligation due	Status
	JOET DEMO				•••
	Malone				Edit folder
	J.M. Enterprises	/Malone	Qtr to Jun 2017	07/08/2017	Review & submit
	Malone Motors	/Malone	Qtr to Jun 2017	07/08/2017	Prepare
	Malone Limited	/Malone			Authorise

- **Authorise:** Indicates that you need to authorise or re-authorise AlphaBridge/AlphaVAT to be able access the entity's Business Tax Account via HMRC. To proceed, click on the **Authorise** option in the status column and you will be taken to the Entity authorisation wizard (see the Entity Authorisation Guide for more information).

- **Prepare:** Indicates that your next step is to prepare your VAT Return via AlphaBridge or AlphaVAT. To proceed, click on the **Prepare** option in the status column and you will be taken to the Entity details – VAT Return tab where you can choose your preparation method (see the AlphaBridge and AlphaVAT Guides for more information).

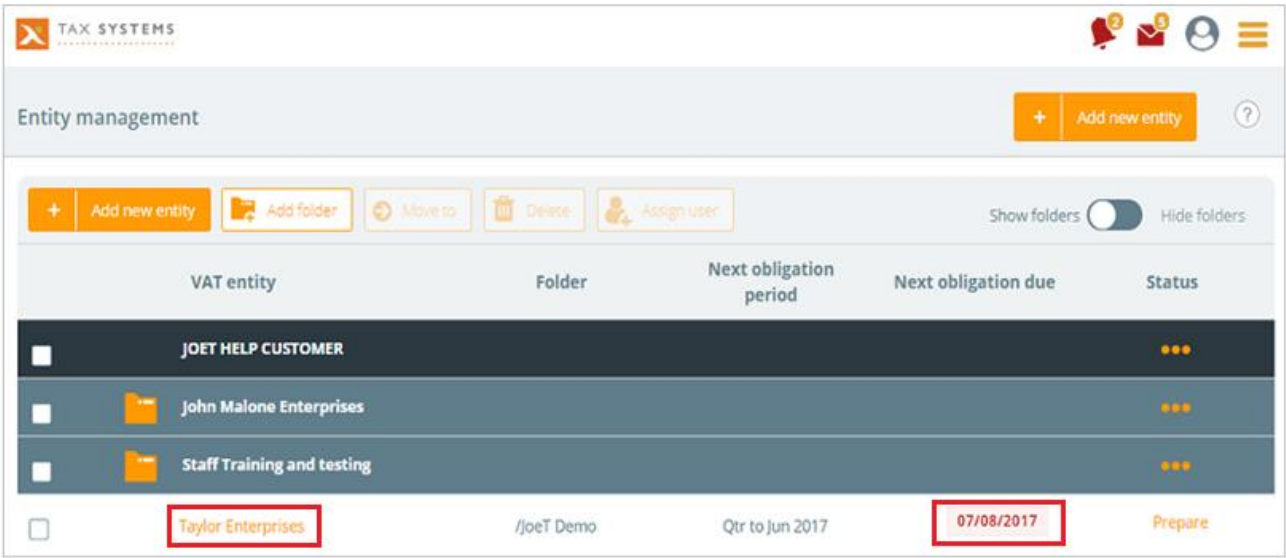
- **Review & Submit:** Indicates that your VAT Return has been prepared and is ready for review so that it can be submitted. To proceed, click on the **Review & submit** option in the status column and you will be taken to the VAT Return summary (see the VAT Return Submission Guide for more information).

Note: *If you have the Group feature, there will be additional status options that are specific to managing group entities. See the* ***Group Entities Guide****.*

View an entity's details

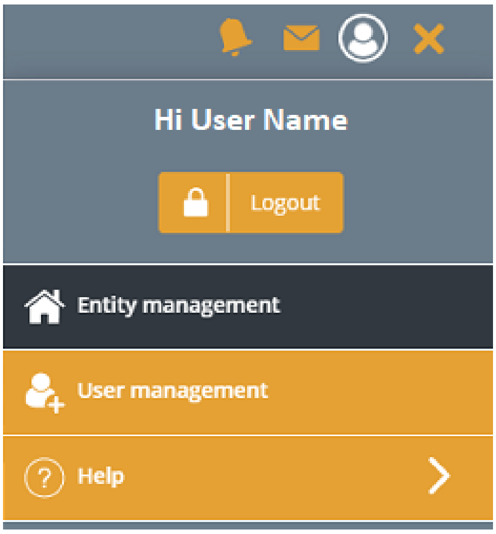
You can view an entity's details by clicking on one of the following:

- VAT entity name
- Next obligation due date



4. The user menu

You can access this menu by clicking on the **User menu** icon displayed in the top right-hand corner of the screen. This will display the following menu options, depending on your permissions:

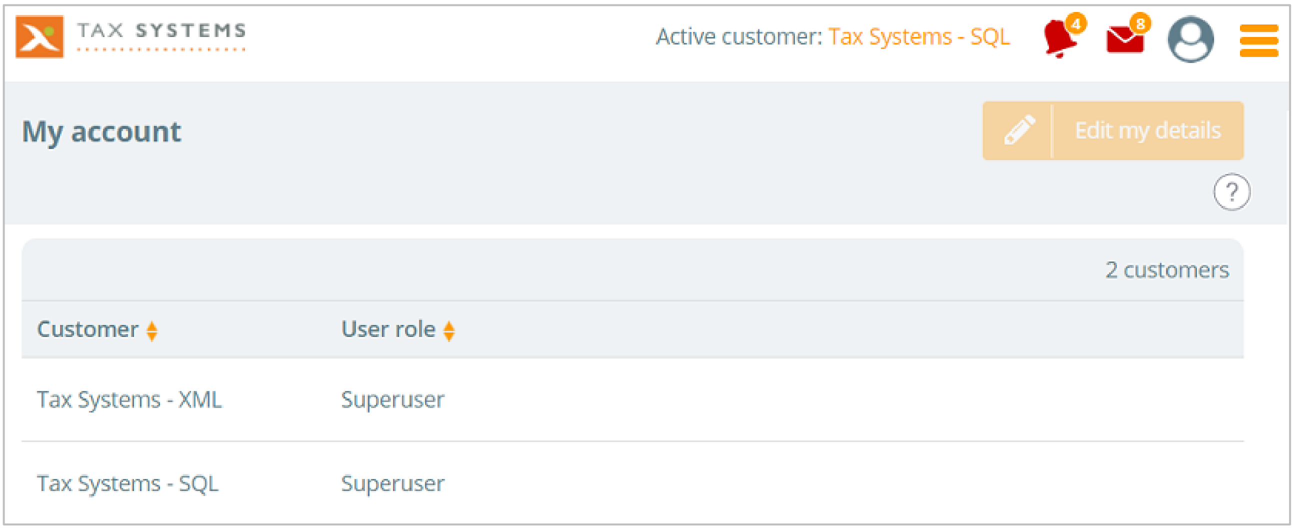


- **Entity management:** will take you the Entity management screen.
- **User management:** You will only see this option if you have the appropriate permissions assigned to your user role.
- **Help:** Will launch the help menu options.

You can also log out of the system by selecting the logout button.

5. User account details

You can access this information by clicking on the User icon displayed in the top right-hand corner of the screen. This will display details of the customer account(s) that you have access to.



If you have more than one customer account, you can switch between your customers by clicking on the customer name that is displayed in orange next to the **Active customer** heading.

For more information on how to manage multiple customers, please see the **System Access and Multiple Customer Management Guide**.

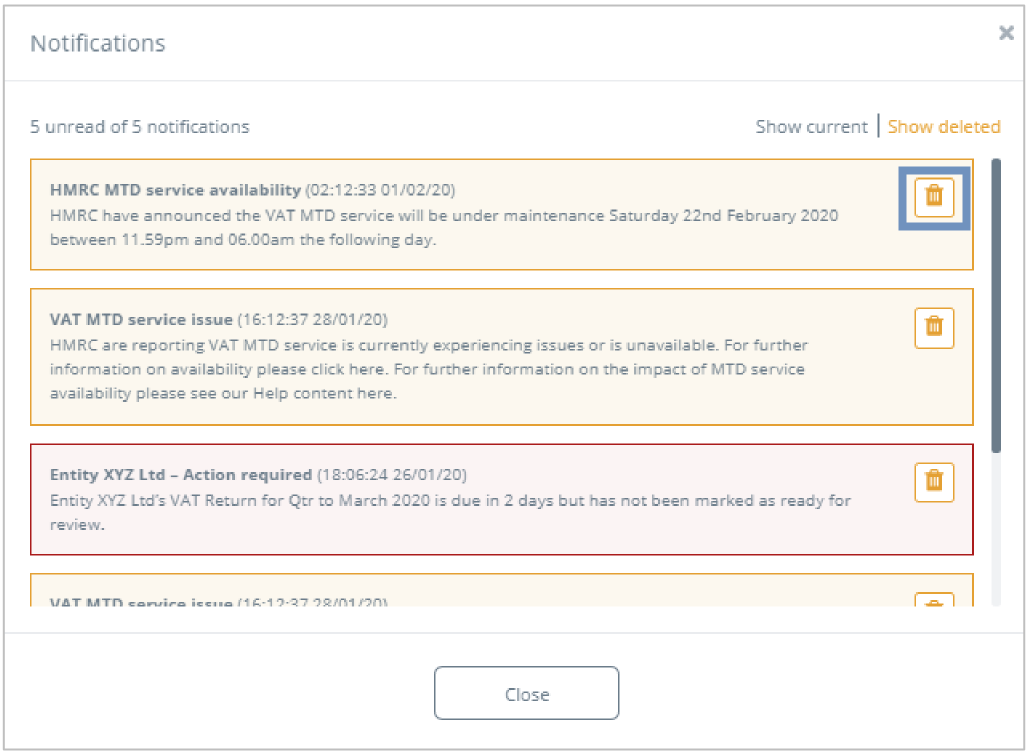
6. View and manage Notifications

The Notifications feature provides reminders of when urgent action needs to be taken in regard to your entity VAT Returns.

It will also provide information regarding HMRC's MTD Service availability, maintenance announcements of when the service will not be accessible and times when the service may be experiencing technical issues.

1. To access your notifications, click on the **Notifications** icon in the top right-hand corner of the Entity management screen.

2. A pop-up box will appear displaying the current list of notifications.



3. Once you have read a notification, you can remove it from the list by clicking on the **Delete** icon.

   You can also toggle between showing current alert notifications and showing past alert notifications that you have deleted, by clicking on the relevant option (**Show current** or **Show deleted**).

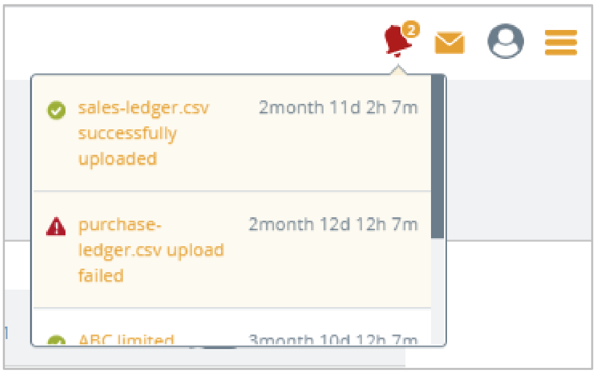
4. To exit from the notification panel, click on the **Close** button.

7. View and manage Alerts

The Alerts feature shows the actions you have performed and whether they have been successful or not.

1. To access your Alerts, click on the **Alerts** icon in the top right-hand corner of the Entity management screen.

2. A drop-down panel will appear showing you the latest actions you have completed.



3. An icon will be displayed for each action listed, to indicate whether they have been successful or not.

	Successful actions are indicated with a tick icon.
	Unsuccessful actions are indicated with the exclamation icon.

In the example above, you can see that the File upload action has failed. By clicking on the alert item, you would be taken to point at which the action failed.

In this example the user would be taken to the File Upload screen for the Entity obligation that was being work on. From there they will be able to determine what the issue might be and how to fix it.

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