



TAX SYSTEMS



AlphaVAT

# Managing Single Entities Guide

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# 1. Introduction

## About this guide

This document guides you through how to create and manage single entities, including:

- Licence options
- Add, edit, and move entities
- Delete single or multiple entities

## Version control

This user guide was last updated as follows:

Date	Summary of changes
02/11/22	New template applied.

## Technical support

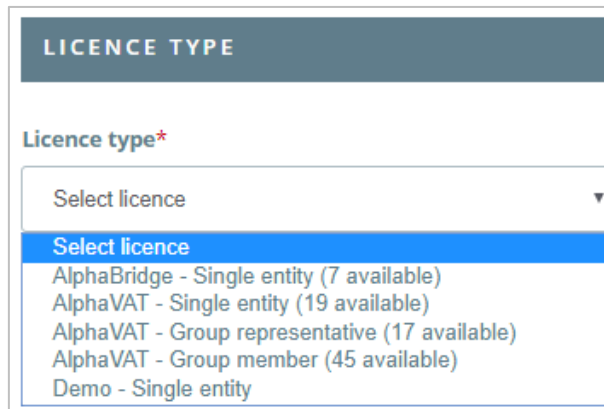
We provide a technical support help desk for users requiring assistance. The help desk can be contacted by telephone between the hours of 9.00 am and 5.30 pm, Monday to Friday excluding public holidays.

You can contact the support team on:		
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## 2. Single entity overview

The system provides a range of features to help you create and manage your entities. Single entities can be created from the Entity management screen and can be saved into specific folders. Once created, you can edit your entity's details and move the entity into a different folder.

When you create a new single entity, you will need to select the Licence type and this will determine the submission method that you can use to prepare your entity's VAT Return.



The screenshot shows a form titled "LICENCE TYPE". Below the title is a label "Licence type\*" followed by a dropdown menu. The dropdown menu is open, showing the following options:

- Select licence
- Select licence
- AlphaBridge - Single entity (7 available)
- AlphaVAT - Single entity (19 available)
- AlphaVAT - Group representative (17 available)
- AlphaVAT - Group member (45 available)
- Demo - Single entity

The Licences available to you, will depend on whether you are an AlphaBridge customer or an AlphaVAT customer.

### AlphaBridge customer licence options

If you are an AlphaBridge customer, you will be able to choose from the following Licence options:

- AlphaBridge – Single entity (XX available)
- Demo – Single entity

To learn more about how to create a Demo entity, see the **Demo Entity Guide**.

## AlphaVAT customer licence options

If you are an AlphaVAT customer, you will be able to choose from the following Licence options:

- AlphaBridge – Single entity (XX available)
- AlphaVAT – Single entity (XX available)
- Demo – Single entity

***Important:*** *If you create an entity and you select an AlphaVAT licence for it, you will not be able to change the licence type to AlphaBridge. However, if you create an entity and you select an AlphaBridge licence you can upgrade the entity to an AlphaVAT licence.*

AlphaVAT customers may also choose to purchase licences for the **Group entity feature** and this will provide them with two additional options in the licence type drop-down list:

- AlphaVAT – Group representative (XX available)
- AlphaVAT – Group member (XX available)

For more information on setting up a group entity, please refer to the **Group Entity Guide**. If you would like to create a Demo entity to learn more about the features available, see the **Demo Entity Guide**.

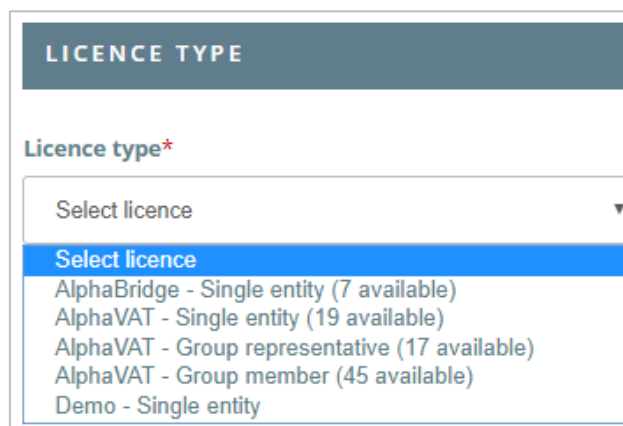
### 3. Add a new single entity

This feature allows you to add a new single entity. From the Entity management screen:

1. Select **Add new entity**.
2. Select the single entity **Licence type** that you want to create from the **drop-down list**:
  - **AlphaBridge - Single entity**: Creates a single entity that is assigned an AlphaBridge Licence. This will only allow you to prepare your VAT Returns using the AlphaBridge submission method.
  - **AlphaVAT - Single entity**: Creates a single entity that is assigned an AlphaVAT licence. This will allow you to prepare your entity's VAT Return for using either the AlphaVAT or AlphaBridge submission methods.

**Important:** Please ensure that you double check your licence selection before you finish creating the entity. If you are an AlphaVAT customer, entities that are assigned an AlphaBridge licence can be upgraded to an AlphaVAT licence at any point using the Edit Entity feature. But it is not possible to downgrade your licence option from AlphaVAT to AlphaBridge once your entity has been created.

You can also create a single demo entity that you can use for training/learning purposes. For more information, please refer to the **Demo Entity Guide**. For the creation of group entities, please refer to the **Group Entity Guide**.



The image shows a screenshot of a web interface for selecting a licence type. At the top, there is a dark grey header with the text "LICENCE TYPE" in white. Below this, the label "Licence type\*" is displayed in a bold, dark font. Underneath the label is a dropdown menu. The menu is currently open, showing a list of options. The first option is "Select licence" in a light grey font, which is the text currently displayed in the dropdown box. Below this, there are five more options, each with a small downward arrow on the right side: "AlphaBridge - Single entity (7 available)", "AlphaVAT - Single entity (19 available)", "AlphaVAT - Group representative (17 available)", "AlphaVAT - Group member (45 available)", and "Demo - Single entity". The "AlphaVAT - Single entity (19 available)" option is highlighted with a blue background.

3. In the **Entity details** section, fields marked with an asterisk (\*) are mandatory and must be completed.

ENTITY DETAILS

Items marked as \* are mandatory

**Entity name\***  
Company name

**Entity short name**  
Enter a shorter name or acronym for reference

**VAT registration number\***  
GB 9-digit number

**Principal place of business\***  
Enter primary address

**Add to parent folder\***  
Select folder

**VAT year start**  
Select month

Cancel Add entity Add and authorise entity

4. Fill in the **Entity name**, **VAT registration number** and the **Principal place of business** fields (mandatory). Care should be taken when typing in the VRN, since this cannot be changed once the entity has been created. If you make a mistake, you will need to delete the entity and create it again.
5. You can enter a **short name** or acronym for the entity (optional).
6. You can select the **month** that your VAT year starts from by clicking on the **drop-down list** (optional).
7. Select the **folder** that you want your entity to reside under from the **drop-down list** (mandatory).
8. Once you have filled in all the details required for the entity, you can select one of the following options:
  - **Add entity:** This allows you to create your new entity and will take you back to the Entity management screen.
  - **Add and authorise:** This allows you to create your new entity and will take you to the Authorisation wizard, where you can begin the authorisation process. For more information, please refer to the **Entity authorisation guide**.
  - **Cancel:** This will cancel the creation of the entity.

**Note:** If you have created a demo entity, this option will be greyed out and you will not be able to select it. This is due to the demo entity feature being designed as a simulation tool, that allows users to familiarise themselves with the system and its features. As such, it cannot interact directly with HMRC. For more information, please refer to the **Demo Entity Guide**.

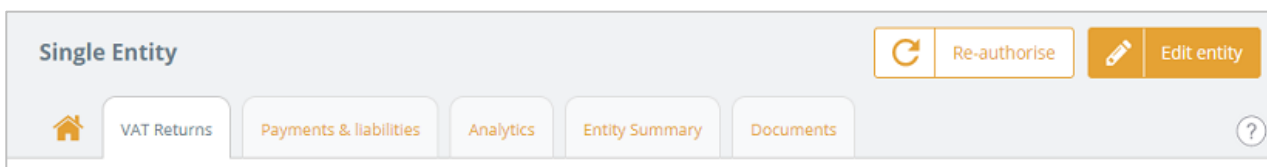
## 4. Edit a single entity

This allows you to edit the details of your entity. However, you are **not allowed** to change the VAT registration number that you have entered.

This is due to the authorisation process, which is required so that HMRC has a record stating that you are happy for the system to access the entity's Business Tax Account, in order to facilitate the digital submission of your VAT Returns for the entity.

**Important:** *If the VAT Registration number you have entered is incorrect, you will need to delete the entity and create it again.*

1. From the Entity management screen, click on the entity's **name**.
2. This will display the Entity summary screen. Click on the **Edit entity** button.



3. Your ability to amend the Licence type will depend on which licence you selected when you created the entity.

### **Entity created with an AlphaBridge – Single licence:**

- If you are an AlphaBridge customer, this option will be greyed out and cannot be changed. Should your business decide to move onto AlphaVAT, you will then be able to upgrade the entity from a single AlphaBridge licence to one of the AlphaVAT licences.
- If you are an AlphaVAT Customer, you will be able to upgrade your entity from a single AlphaBridge licence to a single AlphaVAT licence or to a Group Representative Licence if you have purchased these.

**Entity created with an AlphaVAT – Single Licence:** If you have created an AlphaVAT Single entity, you cannot change the licence type and so this box will be greyed out.

**Entity created as a Demo Single Entity:** If you have created a Demo entity, you cannot convert this into a “real” entity and so the licence type will be greyed out and cannot be changed.

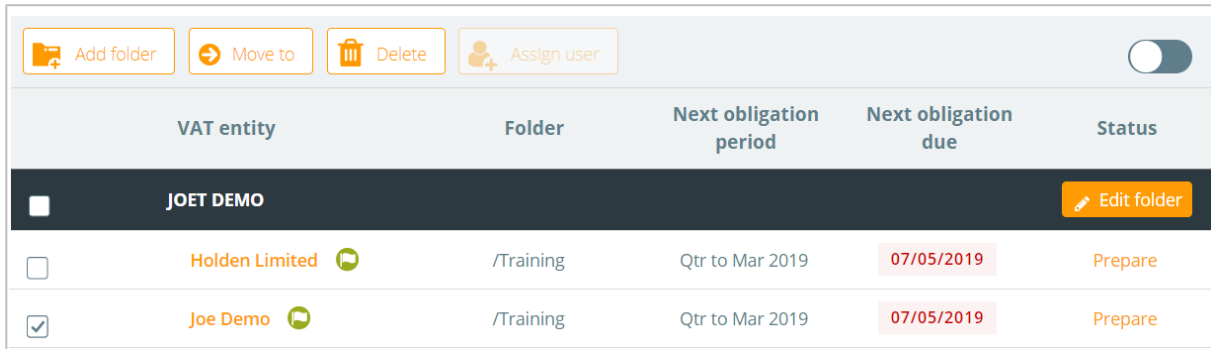


4. In the Entity details section, you can update the entity's **Name, Short name, Principal place of business** and select/change the **VAT year start** month.
5. You can select a different **folder** for the entity to reside under from the **drop-down list**. This will **move** the entity from its current location into the folder you have selected.
6. Once you have made your changes, click on the **Update entity** button. To discard your changes, select **Cancel**.

## 5. Delete a single entity

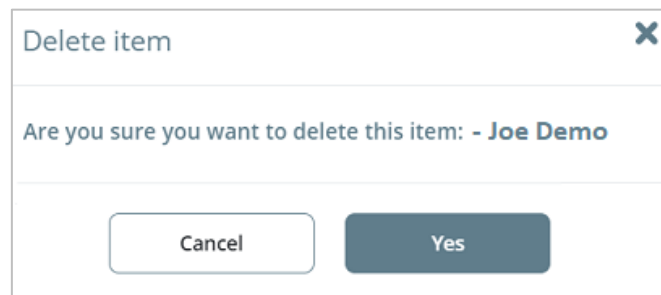
From the Entity management screen:

1. Select the entity you want to delete by checking the **tick box** next to it
2. Click on the **Delete** button.



VAT entity	Folder	Next obligation period	Next obligation due	Status
<input type="checkbox"/> <b>JOET DEMO</b>				<a href="#">Edit folder</a>
<input type="checkbox"/> Holden Limited	/Training	Qtr to Mar 2019	07/05/2019	Prepare
<input checked="" type="checkbox"/> Joe Demo	/Training	Qtr to Mar 2019	07/05/2019	Prepare

3. You will then be asked to confirm that you want to delete the entity by selecting **Yes**.
4. If you do not want to proceed press **Cancel**.



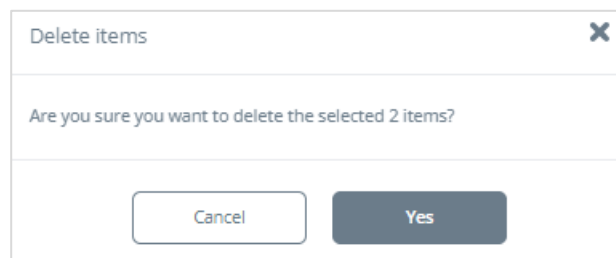
Delete item ✕

Are you sure you want to delete this item: - Joe Demo

## 6. Delete multiple entities

From the Entity management screen:

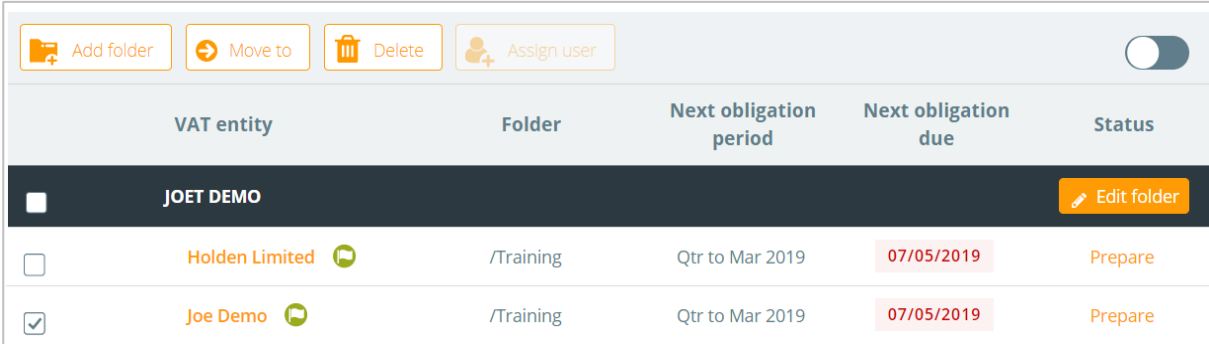
1. Select the entities you want to delete by checking the **tick boxes** next to them.
2. Click on the **Delete** button.
3. You will then be asked to confirm that you want to delete these entities by selecting **Yes**.
4. If you do not want to proceed press **Cancel**.



## 7. Move a single entity

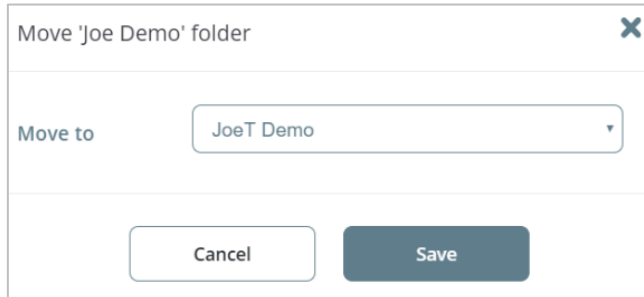
There are two ways to move an entity. You can move an entity by editing the entity, selecting a different folder for the entity to reside in and saving your changes (refer to [Edit a single entity](#)). You can also use the move feature as outlined below.

1. From the Entity management screen, select the entity you want to move by checking the **tick box** next to it and click on the **Move to** button.



Add folder Move to Delete Assign user					
VAT entity	Folder	Next obligation period	Next obligation due	Status	
<input type="checkbox"/> JOET DEMO					Edit folder
<input type="checkbox"/> Holden Limited	/Training	Qtr to Mar 2019	07/05/2019	Prepare	
<input checked="" type="checkbox"/> Joe Demo	/Training	Qtr to Mar 2019	07/05/2019	Prepare	

2. The Move folder dialog box will appear. Select the **folder** you want to move your entity into from the **drop-down list** and click on **Save**.
3. If you do not want to proceed press **Cancel**.



Move 'Joe Demo' folder

Move to: JoeT Demo

Cancel Save



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