TAX SYSTEMS

AlphaVAT

System Access and Customer Management Guide

Public

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1. Introduction

About this guide

This guide explains how to access the system and how to access/manage multiple customers, including:

- Access configuration types (single or multiple customers)
- Logging in for the first time
- Logging back into the system (for users with single and multiple customers)
- Logging out of the system
- How to reset your password
- How to manage multiple customers

Version control

This user guide was last updated as follows:

Date	Summary of changes
08/09/22	New master 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

Please note: *We recommend that you use the* ***E-mail Support*** *option from the* ***Help*** *menu if you need to share screenshots or other attachments directly with Support.*

2. Access configuration types

There are two configuration types for accessing the system, depending on whether the user needs to work on a single customer or with multiple customers.

Single customer access

The system allows user access to be configured to enable them to work on a single customer. This access is set up by their System Administrator. Should the user need to have access to more than one customer, their System Administrator can amend their access configuration to enable this.

Multiple customer access

The system allows user access to be configured to enable them to work on multiple customers. This will enable the user to select the customer they need to work on, after they have logged into the system and completed the 2-factor authentication.

This access is set up by their System Administrator. Should the user's role change, their access can be modified by their System Administrator to add or remove a customer from their access list.

The list of customer accounts will include any account that your email address is associated to.

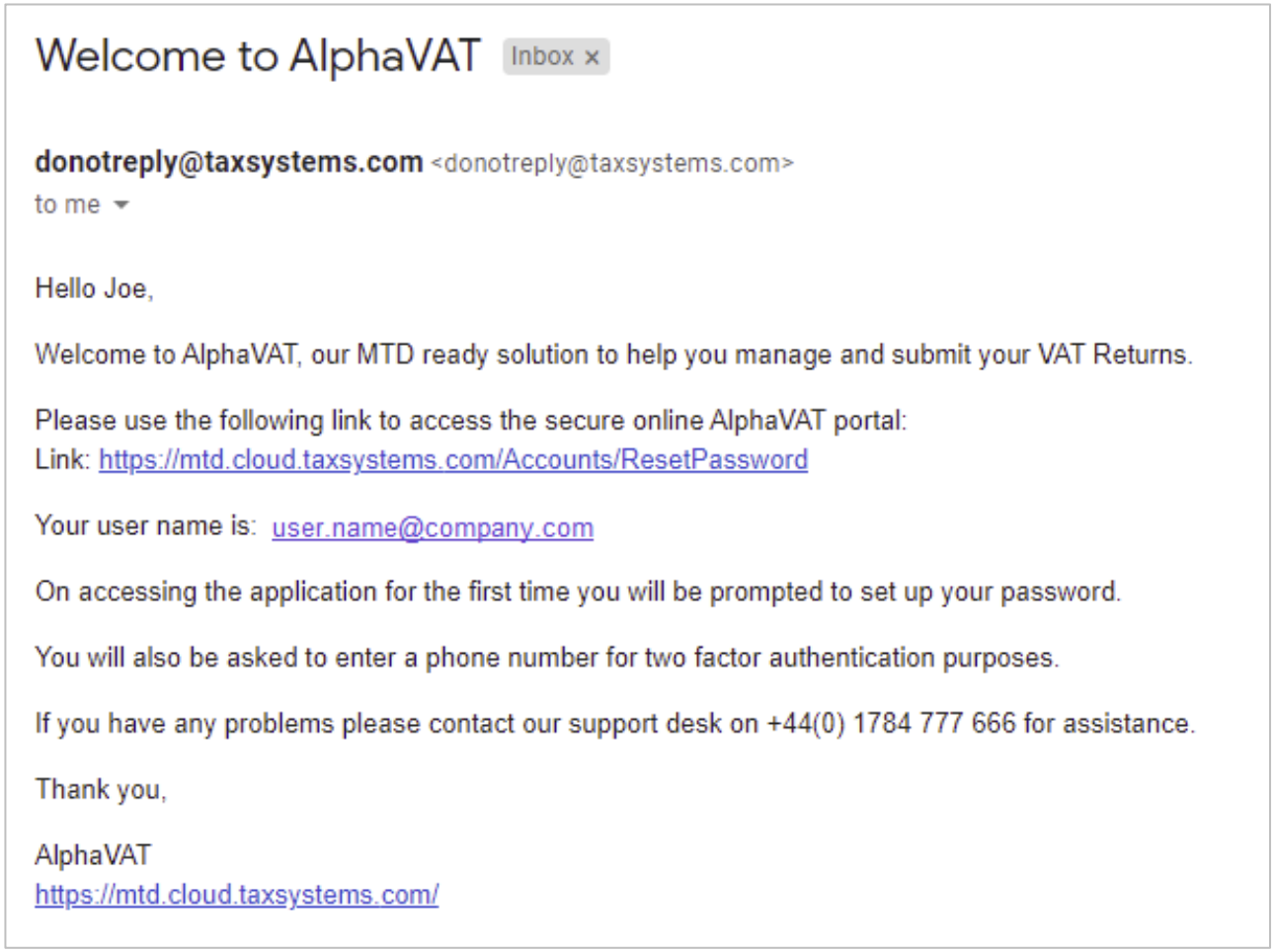
The list is ordered by the **most recently** accessed account first, followed by **alphabetical** ordering of customers.

Accounts that you have been removed from accessing will no longer show in the customer list.

3. How to access the system

Before you can access the system, you will need to be set up as a new user by your System Administrator.

Once this is done, you will receive an email providing you with your username (this will be your email address) and a link to reset your password:



Welcome to AlphaVAT Inbox ×

donotreply@taxsystems.com <donotreply@taxsystems.com>
to me

Hello Joe,

Welcome to AlphaVAT, our MTD ready solution to help you manage and submit your VAT Returns.

Please use the following link to access the secure online AlphaVAT portal:
Link: https://mtd.cloud.taxsystems.com/Accounts/ResetPassword

Your user name is: user.name@company.com

On accessing the application for the first time you will be prompted to set up your password.

You will also be asked to enter a phone number for two factor authentication purposes.

If you have any problems please contact our support desk on +44(0) 1784 777 666 for assistance.

Thank you,

AlphaVAT
https://mtd.cloud.taxsystems.com/

AlphaVAT uses two-factor authentication when logging into the system. The first time that you log in, you will be required to create a new password and set up your user authentication.

Thereafter, you will need to use your **Email address** and chosen **Password** to log into the system and select your method of authentication.

4. How to log into the system for the first time

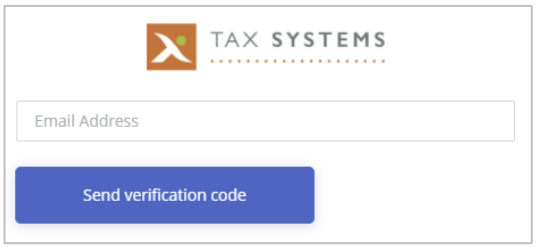
To access the system for the first time, you will need to locate the welcome email sent to you when you were set up on the system as a new user.

This email will include a link to access the system and reset your password, along with your username (which is your email address).

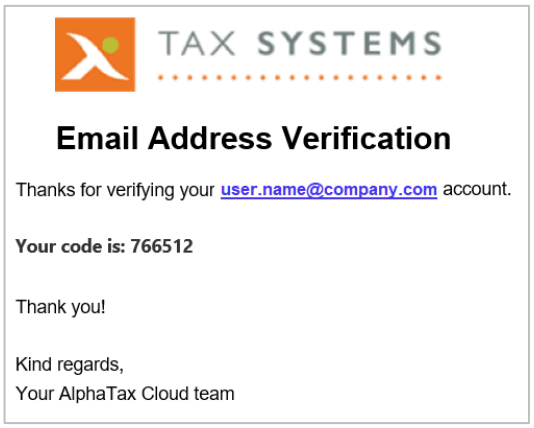
Access the system and verify your account

1. Click on the **AlphaVAT system link** within the email or type the URL into your web browser.

2. Type in your **Email address** and click on the **Send verification code** button.

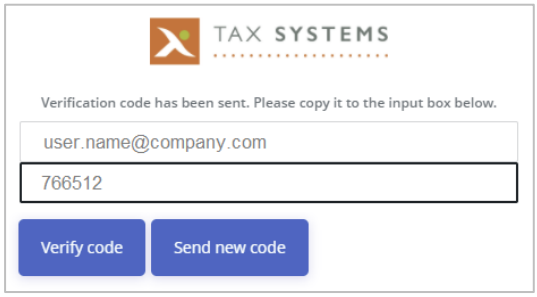


3. The system will send you an email containing your **verification code**.

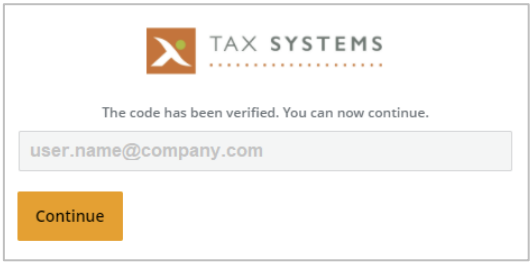


4. **Type in your verification** code or copy and paste it into the box. Click on the **verify code** button.

   You also have the option to **Send new code**, should you lose or delete the email by mistake.

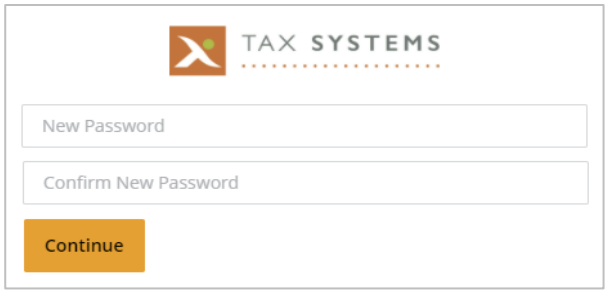


5. The system will confirm that your code has been verified. Click on **Continue**.



Create your password

6. You will now be asked to **enter and confirm** your new password.



A strong password is recommended. Strong passwords are made up of 8 to 16 characters and must combine uppercase and lowercase letters, numbers and symbols. They cannot contain your username.

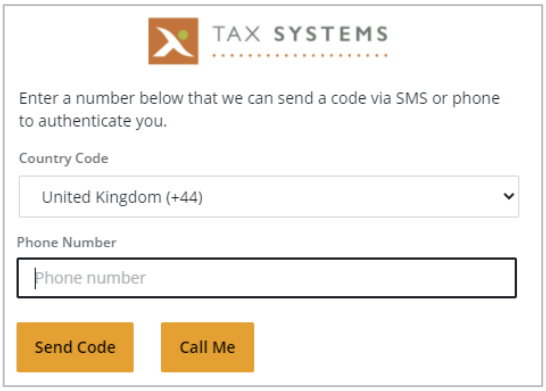
Once you have entered and confirmed your password, click on the **Confirm** button.

Set up your 2-factor authentication

7. You will need to set up your 2-factor authentication by providing a telephone number that the system can contact you on. We recommend entering a mobile number so that you can use the both options.

Please note: *If you enter a landline number you will not be able to use the Send code option to text a code to your phone.*

The system defaults to the United Kingdom Country Code. To change this click on the **drop-down list** and select the required **country code**.



Type in the **phone number** that you would like the system to contact you on.

You then need to select either **Send Code** or **Call me** to complete your set up and to test the authentication process.

- **Call Me:** You can choose to have the system call you on the number you have provided, by selecting the **Call Me** option. Answer the call and press the **# key**. Your authentication will be confirmed, and you can end the call.
- **Send code:** If you have entered a **mobile** phone number, you can also choose the **Send Code** option, which will send you a text message containing a one-time verification code. Enter the **code** on screen when prompted to, then click on the **Verify Code** button.

8. Once you have set up and tested your authentication, you will be taken back to the Welcome Screen. You will now need to log on again, in order to access the system.

For users accessing a single customer, go to **Section 4.**

For users that have access to more than one customer, go to **Section 5.**

5. Single customer: Logging into the system

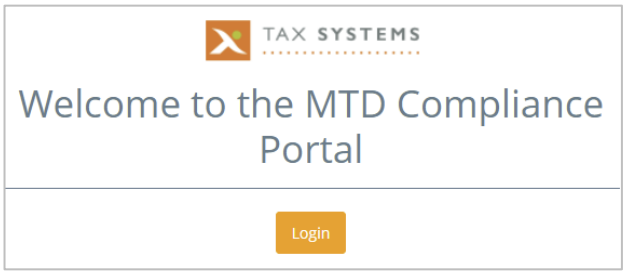
When you log into the system for the first time, you are required to update your password and set up your authentication. This is a **one-time action** and thereafter, you will be able to log in with your email address and password, and then complete the authentication to access the system.

1. If you have saved the AlphaVAT system link as a favourite, **select it** and you will be taken to the Welcome screen.

   Alternatively you can click on the **AlphaVAT system link** located at the bottom of your welcome email or type the URL into your web browser:

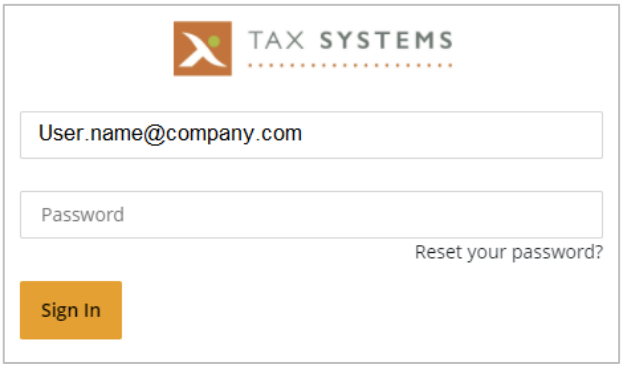
   https://mtd.cloud.taxsystems.com/

2. Click on the **Login** button.



3. Type in your **Email address** and click on **Next**.

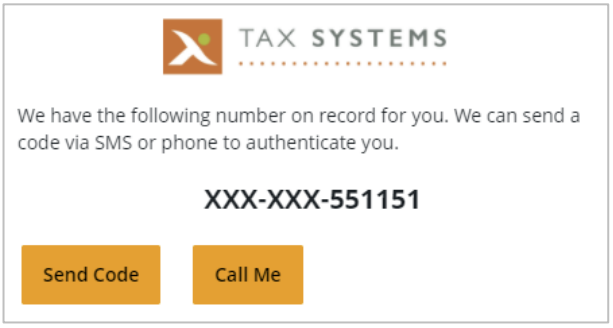
4. Type in your **password** and click on the **Sign in** button.



5. You will now be asked to authenticate your login via your phone. Choose your method of authentication:

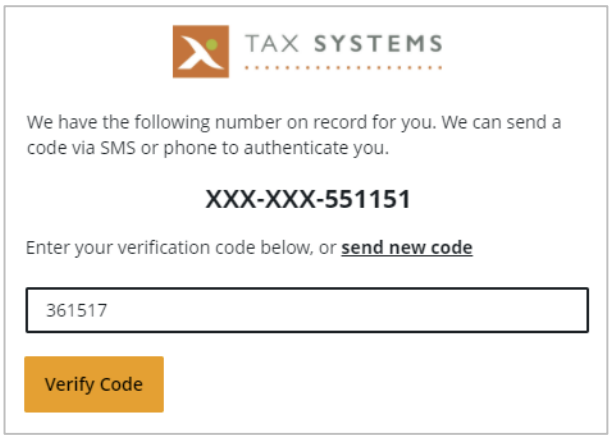
- **Call Me:** You can choose to have the system call you on the number you have provided, by selecting the **Call Me** option.

  Answer the call and press the **# key**. Your authentication will be confirmed, and you can end the call.



- **Send code:** If you have entered a **mobile** phone number, you can also choose the **Send Code** option, which will send you a text message containing a one-time verification code.

  Enter the **code** on screen when prompted to, then click on the **Verify Code** button.



6. Once you have authenticated, you will be taken into the system.

6. Multiple customers: Logging into the system

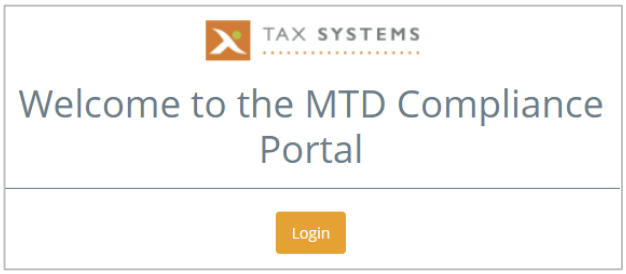
When you log into the AlphaVAT system for the first time, you are required to update your password and set up your authentication. This is a **one-time action** and thereafter, you will be able to log in with your email address and password, and then complete the authentication to access the system and choose which customer you wish to work on.

1. If you have saved the AlphaVAT system link as a favourite, **select it** and you will be taken to the Welcome screen.

   Alternatively you can click on the **AlphaVAT system link** located at the bottom of your welcome email or type the URL into your web browser:

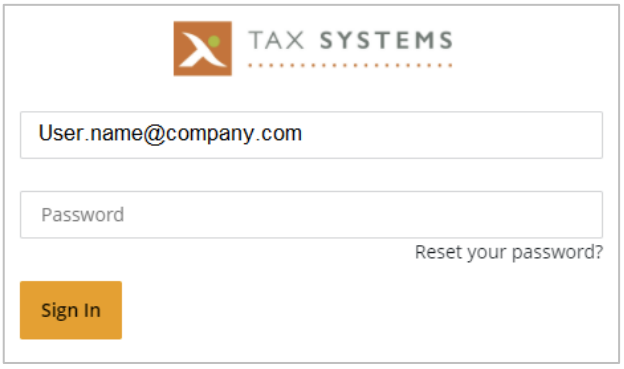
   https://mtd.cloud.taxsystems.com/

2. Click on the **Login** button.



3. Type in your **Email address** and click on **Next**.

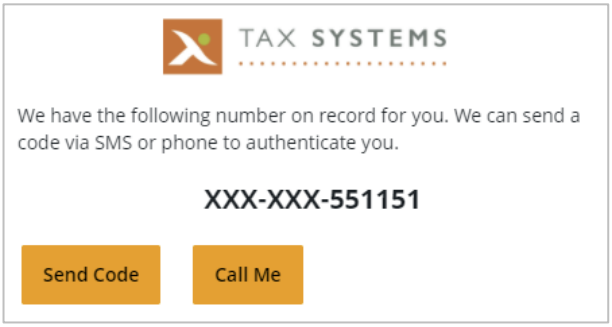
4. Type in your **password** and click on the **Sign in** button.



5. You will now be asked to authenticate your login via your phone. Choose your method of authentication:

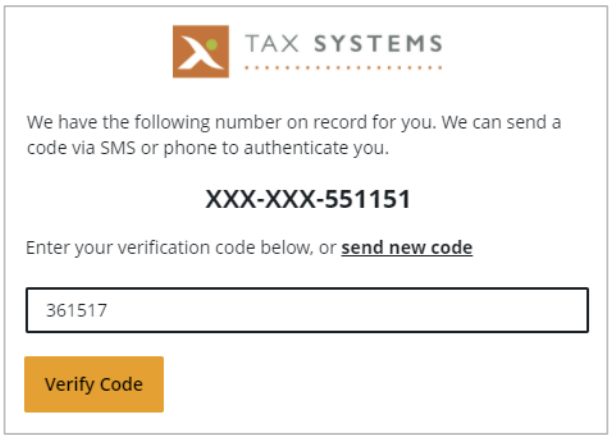
- **Call Me:** You can choose to have the system call you on the number you have provided, by selecting the **Call Me** option.

  Answer the call and press the **# key**. Your authentication will be confirmed, and you can end the call.



- **Send code:** If you have entered a **mobile** phone number, you can also choose the **Send Code** option, which will send you a text message containing a one-time verification code.

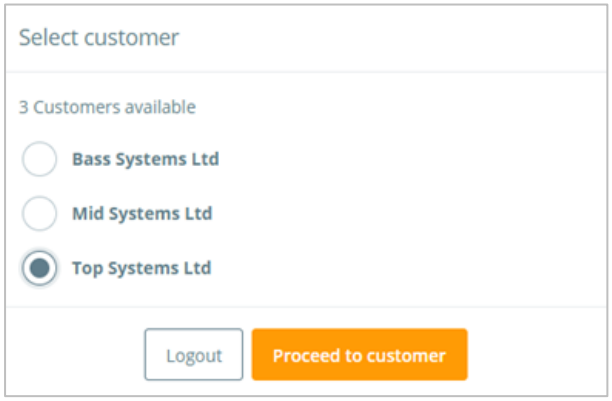
  Enter the **code** on screen when prompted to, then click on the **Verify Code** button.



6. If you have access to multiple customers, you will now see the Select customer dialog.

   Choose the customer you wish to work on, by clicking the **Selection button** next to their name.

7. Once you have chosen your customer, click on the **Proceed to customer** button.



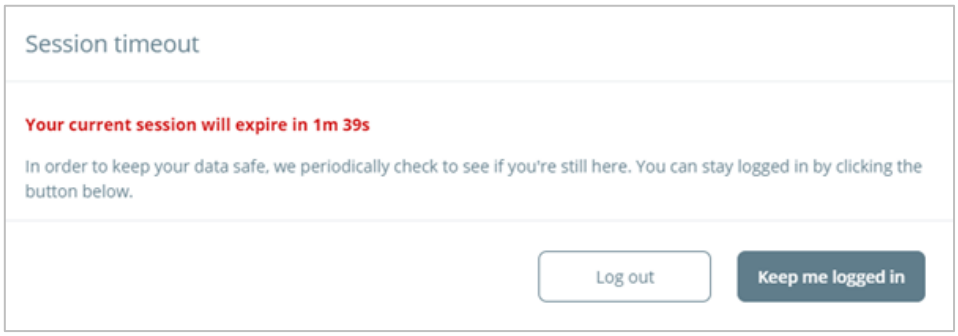
8. You will be taken into the system, where you can work on tasks for your chosen customer.

7. Session timeouts and prompts

When users log-in and authenticate with the portal, a behind the scenes token is issued and the session is established. Active sessions will not expire and so users do not need to re-authenticate during this active period.

Sessions can only expire when users are inactive, when they close the browser or tab, or when their authentication token expires for other reasons such as when their password has been reset or their user permissions have been changed. Note that remaining on the same page without refreshing is classed as inactivity.

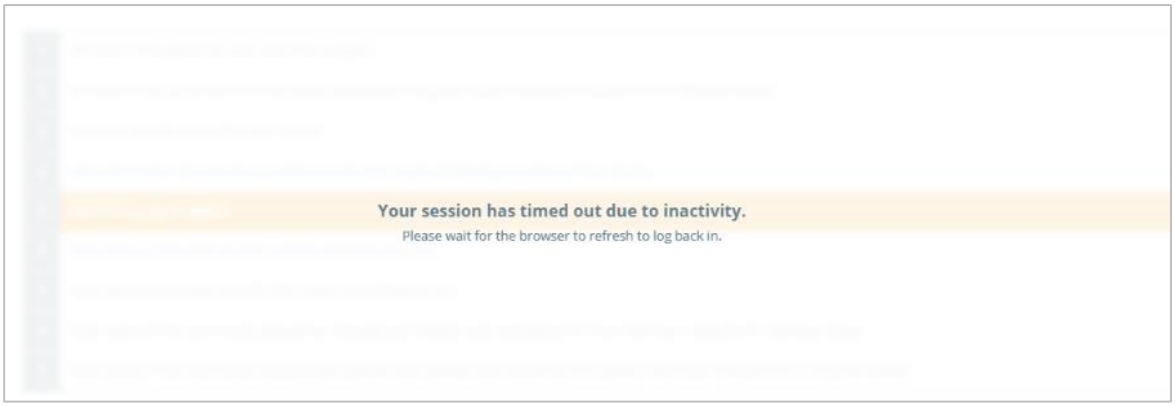
When a page is loaded, a ten-minute timer commences. Note that this timer is reset by either page navigation or a refresh. After this ten-minute timer ends, the portal notifies the user that the session is due to expire:



This prompt is displayed when the session has two minutes remaining before it will timeout due to inactivity. The user can select either **Log out** or **Keep me logged in**.

After this two-minute timer ends, and the session expires, the portal will timeout and the user will be returned to the landing page.

If the session times out when the browser tab does not have focus (e.g., is minimised or is not an active tab/window), upon focus being restored, a short delay may occur before the browser refreshes to reflect the timeout.



In the scenario whereby users have multiple portal tabs, the other tabs will not refresh due to the timeout unless they are visited before logging back into the portal.

8. How to log out of the system

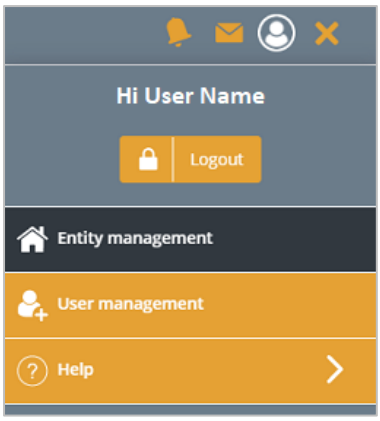
The **User menu** icon is located in the top right-hand corner of the screen.

Selecting this reveals a dialog box that allows you to switch between Entity management and User management (depending on your permissions), view the Help resources and log out of the system.

1. When you are ready to log out of the system, click on the **User menu** icon.

2. Click on the **Logout** button.

3. You will now be taken back to the **Welcome screen**.

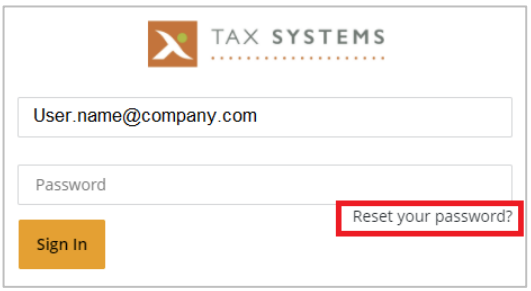


9. How to reset your password

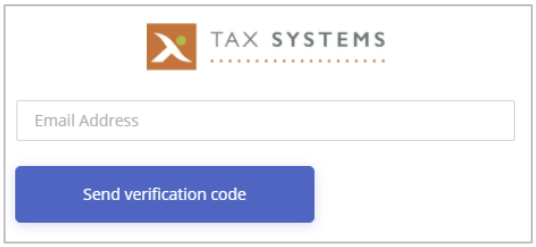
To begin, you will need to **launch your browser**, go to your **AlphaVAT system link,** and click on the **Login** button. Then follow the instructions below:

1. Enter your **Email address** and click on **Next**.

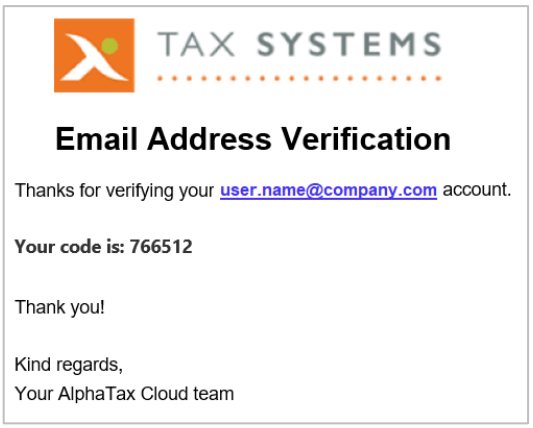
2. Click on the **Reset your password?** link.



3. Re-enter your **email address** and click on the **Send verification code** button.

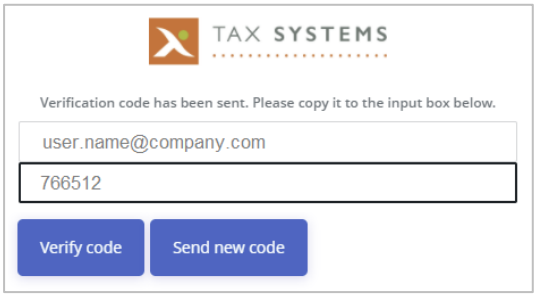


4. The system will send you an email containing your **verification code**.

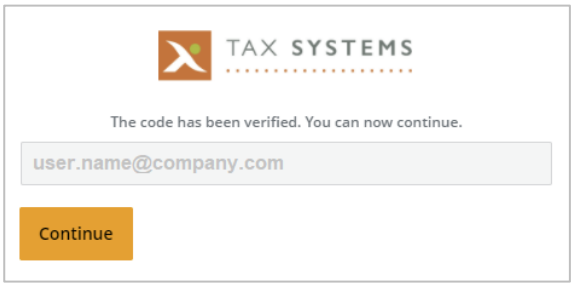


5. Type in your **verification code** or copy and paste it into the box. Click on the **verify code** button.

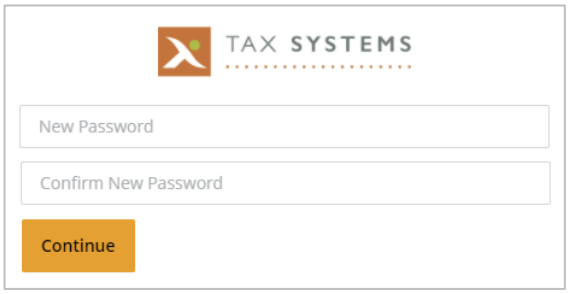
   You also have the option to **Send new code**, should you lose or delete the email by mistake.



6. The system will confirm that your code has been verified. Click on **Continue**.

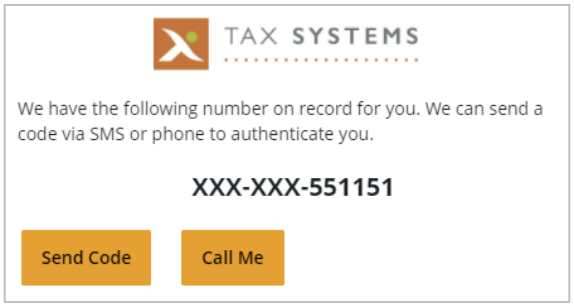


7. You will now be asked to **enter and confirm** your new password. Then click on the **Confirm** button.



8. You will need to complete the authentication process by selecting either **Send Code** or **Call Me**.

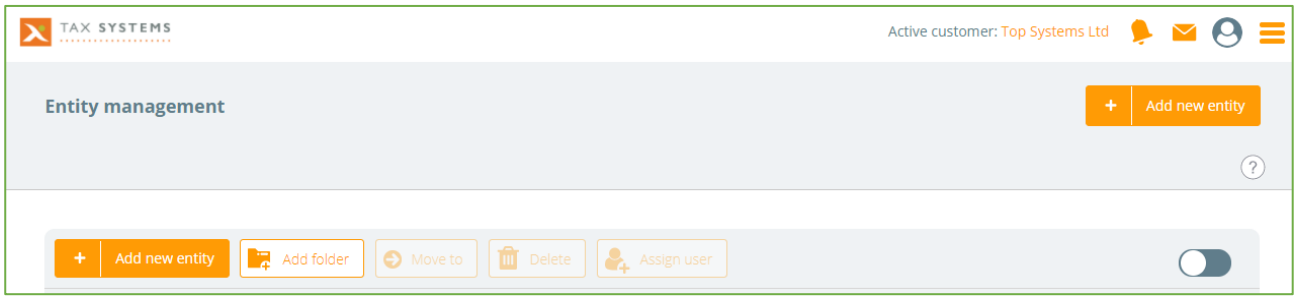
   Once you have successfully authenticated, you will be taken into the system.



10. Managing multiple customers

Entity management screen

When you log into the system you will be asked to choose the customer you wish to work on. You will see the customer's name displayed in the top right-hand corner of the Entity management screen, indicating that they are the Active customer.



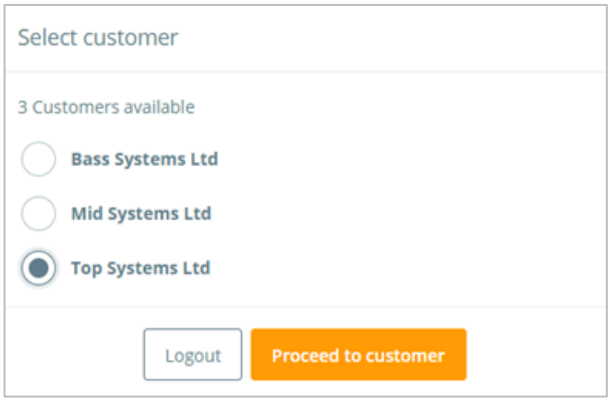
Switching to a different customer

To switch to a different customer that you have access to:

1. Hover over the name of your current active customer. This will display the option to Switch customer. Click on the **Switch customer** button.

2. You will now see the Select customer dialog, listing the customers that you have access to.

   Select the **customer** you wish to work on and click the **Proceed to customer** button.



3. You will now be taken back into the system and the Entity Management screen will now display your selected customer as the **Active customer**.

Using multiple browser tabs

AlphaVAT only allows a single active session per web browser.

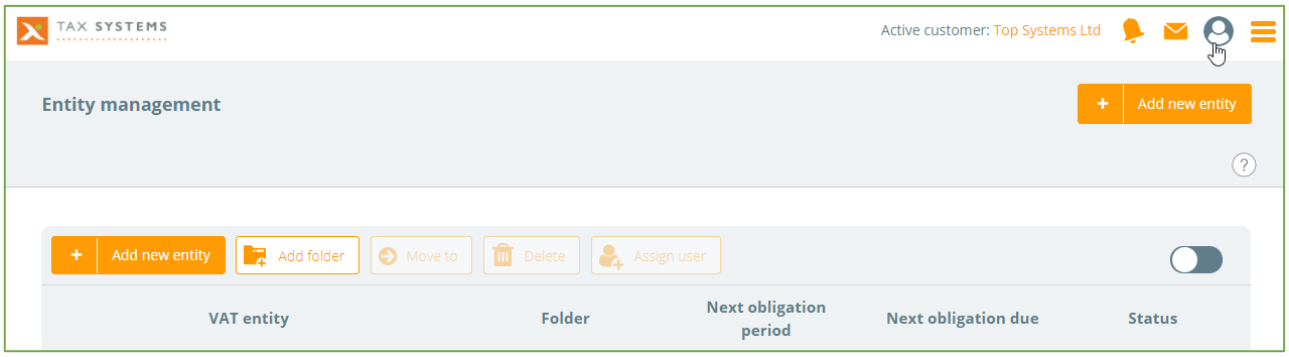
If you have multiple browser tabs open, switching the active customer account in one browser tab will also switch your session in all other browser tabs for the same web browser.

There may be a delay seen in other browser tabs, however no information can be saved into a customer account if this is not the active customer account.

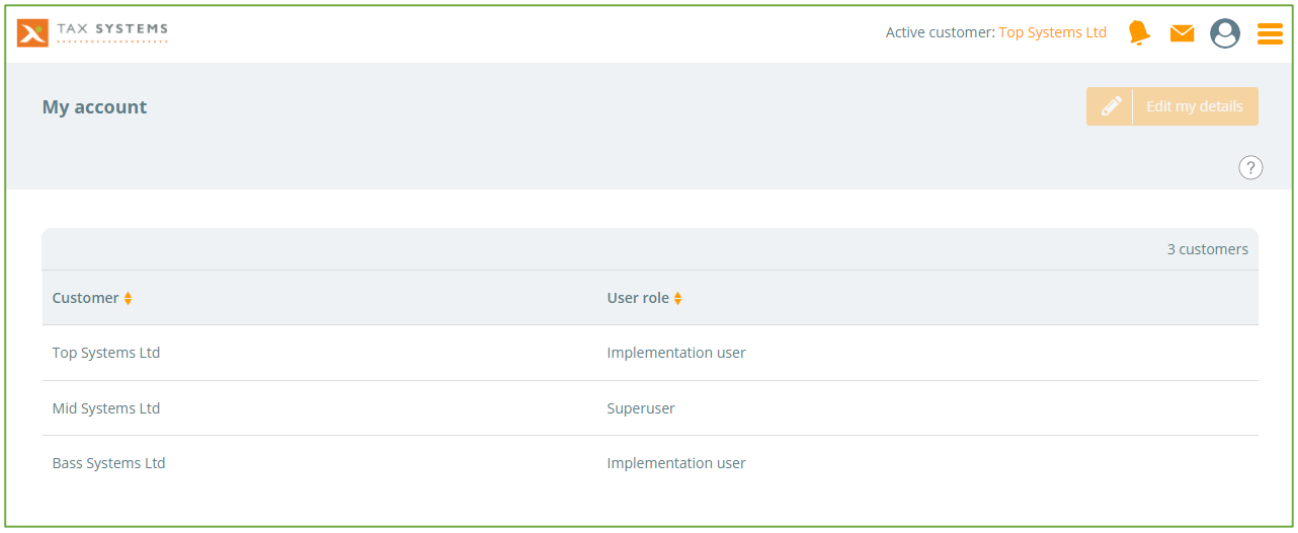
Accessing your "My Account" page

The **My account** page shows you information about the customer accounts your email address currently has access to.

To access the page, select the **user icon** in the top right hand corner of the system menu.



Selecting this will take you to the following page:



You can also see the **user role** that your account has across all customer accounts. Your user role will determine the permissions you have within each customer account. User roles are specific to the customer account they are associated to.

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W: www.taxsystems.com

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