

Creating Assistants

In Online Services, anyone can create an assistant account and control their level of access.

Once you activate your online VAT account, the system recognises you as the **main user** and you are then able to set up assistants who can help in various roles within the VAT services, messaging, filing returns and making payments.

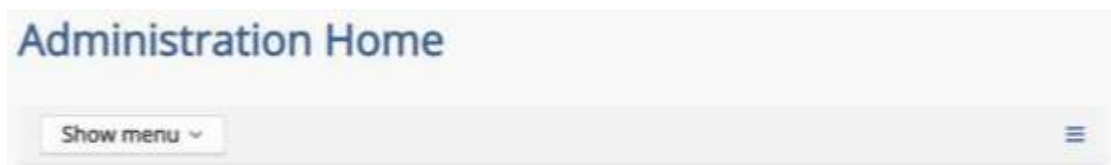
To register someone as an assistant you need to log onto online services first, then click on the menu option beside your name on the top toolbar.



Click on **Account** from the list of options.



Click on **Show Menu**.



Click on **Assistants**.



Click **Show Menu**



Enabled **Disabled**

To disable an assistant, select the assistant by clicking on their username and then choosing the "Disable Assistant" link. This user will then no longer be able to access Online Services.

Login ID	User Name	Access Level	Locked	Inactive
CharlieL	Charlie Loach	Standard		
PLoach	Picoin Loach	Administrator		

You can also view any assistants you've already registered on this screen.

Click on **Create Assistants**

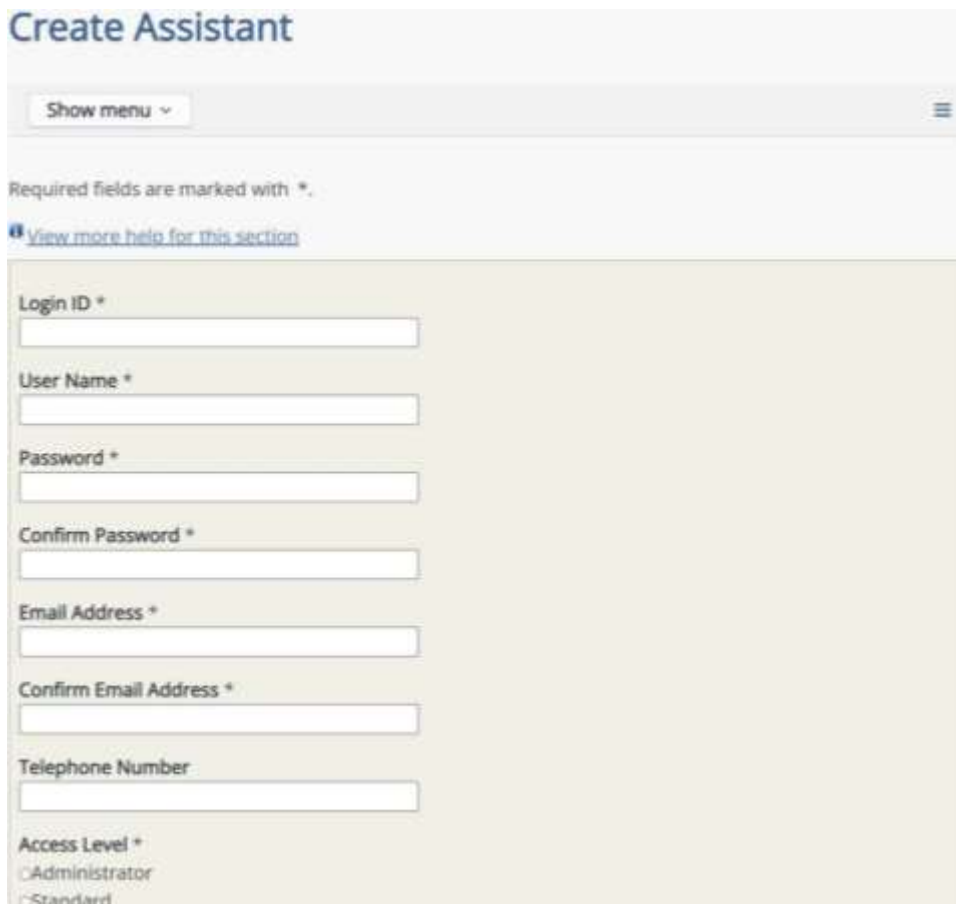


Assistants

Hide menu ~

[Create Assistant](#) [View Assistants](#)

Complete all the details on the **Create Assistant** screen



Create Assistant

Show menu ~

Required fields are marked with *.

[View more help for this section](#)

Login ID *

User Name *

Password *

Confirm Password *

Email Address *

Confirm Email Address *

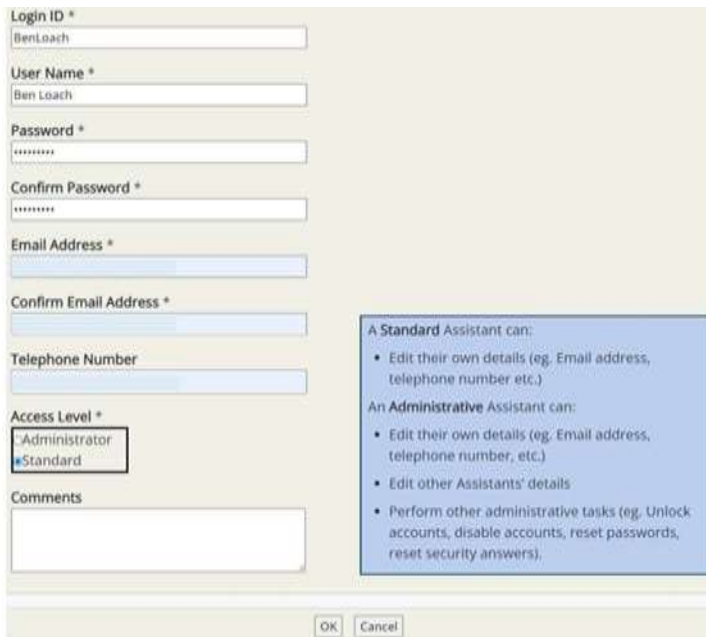
Telephone Number

Access Level *
 Administrator
 Standard

Choose the **access level** you want them to have selecting either **Administrator** or **Standard**.


Hint: Anyone you add here will be prompted to change their password when they log onto Online Services for the first time using the details you input on this screen, but you must first take a note of the password you create here so that they can use it to log on for the first time !

For example



The screenshot shows a form for creating an assistant. The fields are: Login ID * (BenLoach), User Name * (Ben Loach), Password * (masked with dots), Confirm Password * (masked with dots), Email Address * (empty), Confirm Email Address * (empty), Telephone Number (empty), Access Level * (Administrator and Standard, with Standard selected), and Comments (empty). A blue callout box on the right lists permissions: A Standard Assistant can: Edit their own details (eg. Email address, telephone number etc.); An Administrative Assistant can: Edit their own details (eg. Email address, telephone number, etc.), Edit other Assistants' details, and Perform other administrative tasks (eg. Unlock accounts, disable accounts, reset passwords, reset security answers). At the bottom are OK and Cancel buttons.

Scroll down and click **OK**.



A close-up of the OK and Cancel buttons from the form.

You'll then see this onscreen message.



The screenshot shows a success message titled 'Create Assistant'. The message says: 'Assistant has been created'. Below this, it states: 'The security answer has been set to a sequence of the letter "Y". Please ensure this is passed on to your Assistant as they will need this when logging in for the first time'. It also notes: 'They will remain 'inactive' until they have logged in for the first time and accepted the terms and conditions.' There is an OK button at the bottom.

Make a note of the highlighted letter on the screen – your employee needs this letter when they log onto the Online Services for the first time using the login ID and password that you created, then click **OK**.

You'll then see confirmation of the assistant you have just created.

Ben Loach inactive

Assistant Details

Login ID:	BenLoach
Email Address:	
Phone Number:	
Access Level:	Standard
Comments:	

[Edit Details](#)

- [Reset Password](#)
- [Reset Security Answer](#)
- [Disable Assistant](#)

Permissions

Add new permission

Customs & Excise (VAT)	None	Add
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Change their permissions for Customs & Excise (VAT) to **Enquiry Only** by clicking the dropdown arrow and then click the **Add** button.

You'll then see confirmation of the new permission for Customs & Excise (VAT).

Information

'Enquiry' access has been granted for this user to 'Customs & Excise (VAT)'. If they are currently logged into the system, they will need to log off and then on again for this to take effect.

Ben Loach inactive

Assistant Details

Login ID:	Gingerbread111
Email Address:	
Phone Number:	
Access Level:	Administrator
Comments:	

[Edit Details](#)

Permissions

Existing Permissions	Access Level	
Customs & Excise (VAT)	Data Entry	Change

Your employee now needs to log onto Online Services to activate their account.