
VAT for Accountants User Guide

Filing VAT for clients from Tax Optimiser — creating client organisations, mapping their spreadsheets, connecting to HMRC with your agent account, sending returns and giving clients access.

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Filing VAT for clients: the accountant workflow

How filing VAT for clients works in Tax Optimiser - what you set up once for the firm and what you do for each client.

IN SHORT

- Tax Optimiser is MTD bridging software: clients keep their own spreadsheets
- You file VAT for every client from one firm login
- Your HMRC agent account connects once and covers all clients
- Per client: create org, map spreadsheet, connect, then upload and send
- You can give each client access to their own organisation

Tax Optimiser files VAT returns to HMRC under **Making Tax Digital** as bridging software: your client keeps their figures in their own spreadsheet, and you upload it and submit the nine VAT-return boxes digitally on their behalf. As an accountant you do this for every client from one firm login – this guide walks the whole journey, from creating a client organisation to sending its return and giving the client access.

Sign up as an accountant

If you haven't already, click **Sign up** in the top-right corner, choose **Accountant / Bookkeeper**, and register with your details. You land on your accountant dashboard; **Organisations** is your list of clients.

The screenshot displays the Tax Optimiser web application interface. The top navigation bar includes the 'taxoptimiser' logo and a user profile 'Erin Example'. The left sidebar contains a menu with items: Dashboard, Organisations (highlighted), Accounts and Corp Tax, VAT Returns, Individual Clients, Calculators, Reports, Firm Settings, Settings, and Logout. The main content area is titled 'Organisations' and features a 'Create' button in the top right. Below the title, there are three dropdown menus for 'Accountant' (Not Selected), 'Manager' (Not Selected), and 'Partner' (Not Selected), followed by an 'Organisation Search Type' dropdown (Please Select). A search filter is located below these menus with the placeholder text 'Type to filter...'. Under the filter, a table lists the organisations. The table has columns: Organisation, Reference, VAT Reg, Next Accounts Due, PSC Due, and Action. One organisation is listed: 'Example Workflow Ltd'. At the bottom of the table area, it indicates 'Showing 1 to 1 of 1 entries' and includes a pagination control showing the number '1'.

What you set up once for the firm

Connecting to HMRC for VAT uses your firm's **HMRC agent account** — connect it once and you can view and submit VAT for every client you act for. You can also add colleagues to the firm so they can work alongside you (covered in the last article).

What you do for each client

1. **Create the organisation** and record its VAT registration number.
2. **Map its VAT spreadsheet** in VAT Settings — once per client.
3. **Connect to HMRC** (practise in demo mode, then go live with your agent account) so the client's VAT periods flow in.
4. Each quarter, **upload, check and send** the return.
5. Optionally **give the client access** to their own organisation.

Create a client organisation and enable VAT

Add a client organisation from your Organisations list - only the VAT registration number is required.

IN SHORT

- Each client is an organisation; create one per client
- Add from Organisations, then Actions, Add New
- Only the VAT Registration No is required to get started
- A client has its own sub-menu; the accountant menu returns to your firm view
- The VAT number and scheme live on the client's Tax & VAT settings

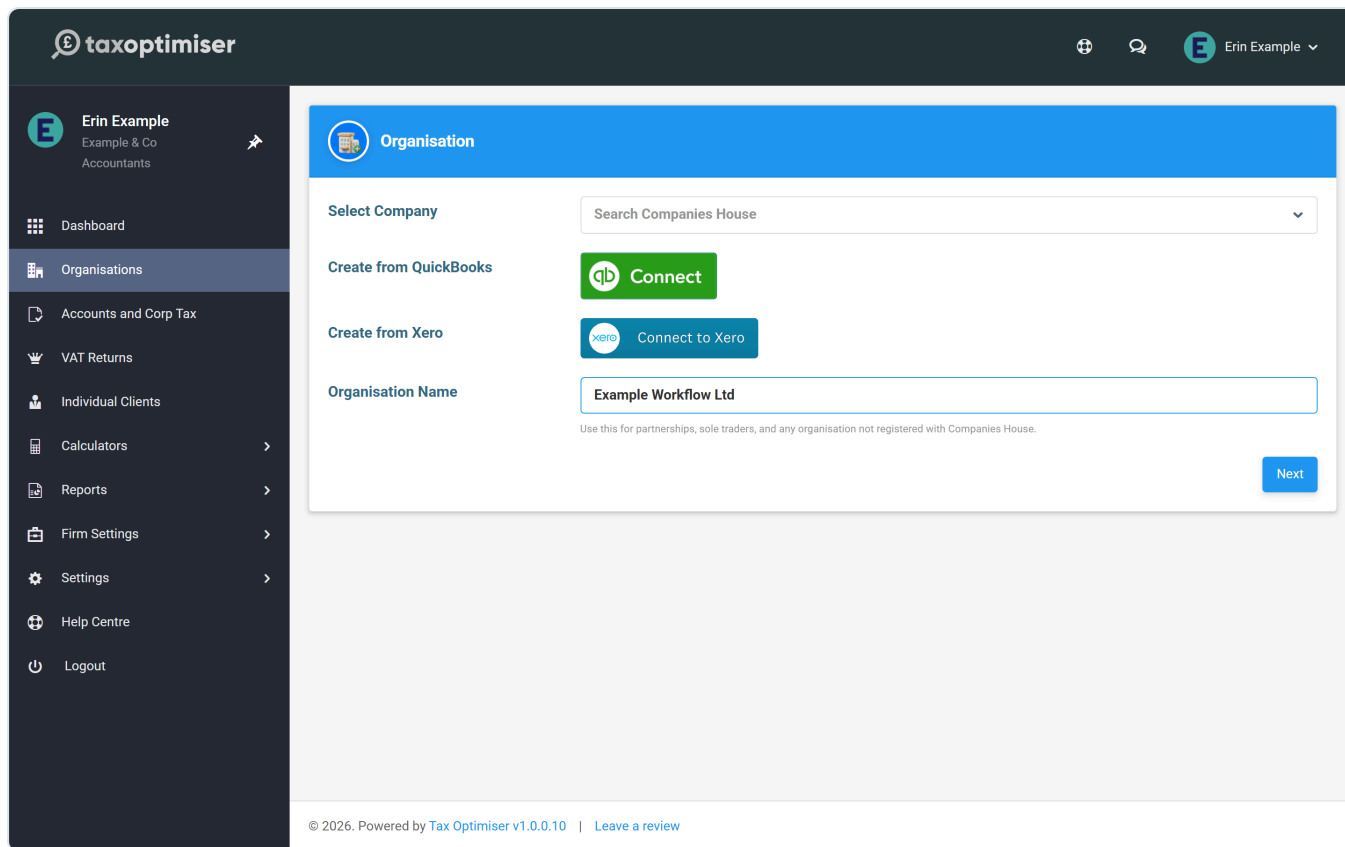
Every client you act for is an **organisation** in Tax Optimiser. You create one per client, and for VAT the only field you must complete is the client's VAT registration number — everything else can follow later.

Add the organisation

From your dashboard click **Organisations** to see your client list, then **Actions** → **Add New**.

The screenshot displays the 'Add New Organisation' form in the Tax Optimiser application. The sidebar on the left contains the following navigation items: Dashboard, Organisations (selected), Accounts and Corp Tax, VAT Returns, Individual Clients, Calculators, Reports, Firm Settings, Settings, Help Centre, and Logout. The main content area has a blue header 'Organisation'. Below this, there is a 'Select Company' dropdown menu with the placeholder text 'Search Companies House'. Underneath, there are two buttons: 'Create from QuickBooks' (green) and 'Create from Xero' (blue). Below these is an 'Organisation Name' text input field. A small note below the input field states: 'Use this for partnerships, sole traders, and any organisation not registered with Companies House.' At the bottom right of the form is a blue 'Next' button. The footer of the page shows the copyright notice: '© 2026. Powered by Tax Optimiser v1.0.0.10 | Leave a review'.

Enter the client's details. For VAT, only the **VAT Registration No** is required — it's the client's 9-digit number from their VAT registration certificate. Press **Save** at the bottom.



Find your way around a client

Once saved you're inside the client's organisation, with its own sub-menu for VAT and everything else. To get back to your firm's view — the client list, firm settings — use the accountant menu. To add another client, return to the Organisations list and click **Add New** again.

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Organisations > Example Workflow Ltd > Details

+

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E Erin Example ▾

E

Example Workflow Ltd

Overview

Details

Individuals

HMRC VAT

Notes

Back to Organisations

Logout

Example Workflow Ltd

Company DetailsTax & VATInternal ManagementCompanies House

System & Defaults

Companies House No

99999999

Companies House Presenter Id

Companies House Presenter Password

👁

Companies House Authentication Code

ABC123

Has Detailed Income Page

☐

Default Stat Account Type

Micro-entity (FRS 105) ▾

Registered Address

Registered Company Name

Registered Address 1

Where the VAT number lives later

If you need to check or change a client's VAT registration number afterwards, it's on the client's **Tax & VAT** settings, alongside the **VAT Scheme** (most businesses are on *Standard*).

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Switch Organisations

A Alex Example ▾

A Alex Example

Example Trading Ltd

WORKSPACE

Dashboard

Organisation

TAX SERVICES

Accounts and Corp Tax

MTD ITSA

VAT

SYSTEM

Settings

Logout

Example Trading Ltd

Company DetailsTax & VATCompanies HouseSystem & Defaults

VAT Registration No

111111162

VAT Scheme

Standard ▾

VAT Entity

Single Organisation ▾

Corporation Tax UTR

1111111111

Corporation Tax Sender Id

Government Gateway Id

Corporation Tax Password

Government Gateway Password

Tax Office

Save

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Tax Optimiser — VAT for Accountants User Guide

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Map the client's VAT spreadsheet

Tell Tax Optimiser which sheet and cells of the client's spreadsheet hold the nine VAT-return boxes.

IN SHORT

- VAT Settings are per client - map each client's spreadsheet once
- Software templates pre-fill the mapping for common systems
- AI can find the cells for you, but the spreadsheet is sent to a third-party AI provider
- Check the figures AI found before saving; nothing is saved until you press Save
- Sheet name = the Excel tab name, matched exactly
- Each of the nine cell references points at one box's final figure

Each client's VAT figures stay in their own spreadsheet, and you upload it each quarter so Tax Optimiser can read the nine HMRC boxes straight out of it. **VAT Settings** is where you tell it which sheet and cells to read. VAT settings are stored *per organisation*, so you set this up once for each client; after that the quarterly routine is just upload, check, send.

Open VAT Settings

Inside the client, open **HMRC VAT** → **VAT Settings** from the sidebar. You can also open the same settings without leaving the client's returns: choose **Actions** → **VAT Settings** on the **VAT Returns** list or on a return. The **VAT Submission Software** name at the top is what appears on HMRC submissions as the originating software — leave it as Tax Optimiser unless told otherwise.

The screenshot shows the 'VAT Return Settings' page in the Tax Optimiser application. The interface includes a sidebar with navigation options like 'Dashboard', 'Organisation', 'VAT', and 'Settings'. The main content area is titled 'VAT Return Settings' and contains the following sections:

- VAT Submission Software:** A dropdown menu currently set to 'Tax Optimiser'.
- Software Template (optional):** A dropdown menu with 'Select Template'.
- Find cells with AI:** A button labeled 'Find the cells with AI' with a magnifying glass icon.
- VAT Return Cell Mapping:** A section titled 'Which cells in your spreadsheet hold each of the nine HMRC VAT-return boxes.' containing a table of mappings.

Excel Sheet Name	1 VAT due on sales	2 VAT due on EC acquisitions	3 Total VAT due
VAT	B4	B5	B6
	4 VAT reclaimed	5 Net VAT due	6 Total sales ex VAT
	B7	B8	B9
	7 Total purchases ex VAT	8 EC goods supplied ex VAT	9 EC acquisitions ex VAT
	B10	B11	B12

A 'Save' button is located at the bottom right of the mapping section.

Start from a software template...

If the client exports their figures from a known system, pick it from **Software Template** – Sage 50, Sage 200, Access Dimensions, QuickBooks desktop, Dynamics NAV, MYOB, Manager.io and others are listed. Choosing one pre-fills the sheet name and all nine cell references; you can still adjust any of them. Press **Save**.

The screenshot shows the 'VAT Return Settings' page in the Tax Optimiser application. The sidebar on the left includes a user profile for 'Alex Example' and navigation links for 'Dashboard', 'Organisation', 'VAT', and 'Settings'. The main content area is titled 'VAT Return Settings' and contains the following fields and sections:

- VAT Submission Software:** A text field containing 'Tax Optimiser'.
- Software Template (optional):** A dropdown menu with a search bar and a list of templates: 'Access Dimensions', 'Account Master', 'Dynamics NAV 2013', 'Manager.io', 'MYOB Excel Summary', 'Ocean Dynamics Navision', and 'Propman'.
- Excel Sheet Name:** A text field containing 'VAT'.
- VAT Return Cell Mapping:** A section with nine numbered boxes for mapping spreadsheet cells to VAT return items:
 - 1 VAT due on sales: B4
 - 2 VAT due on purchases: B5
 - 3 VAT due on imports: B6
 - 4 VAT reclaimed: B7
 - 5 Net VAT due: B8
 - 6 Total sales ex VAT: B9
 - 7 Total purchases ex VAT: B10
 - 8 EC goods supplied ex VAT: B11
 - 9 EC acquisitions ex VAT: B12
- Save:** A blue button at the bottom right.

...let AI find the cells...

If the client has their own layout, Tax Optimiser can work out the mapping for you. Click **Find the cells with AI**, choose the client's spreadsheet (Excel .xlsx, .xls, .xlsm or .csv), tick the box to confirm you understand, then click **Find cells with AI**.

Before you use it, note that **the spreadsheet is sent to a third-party AI provider** so it can read the layout. Don't use this option if that isn't acceptable for the client's data.

AI fills in the sheet name and the nine cell references, and shows the figure it found under each cell reference. Each figure is read from the file the same way a normal upload reads it. If a cell holds text instead of a number, it is shown in red. If Box 3 doesn't equal Box 1 + Box 2, or Box 5 doesn't equal Box 3 – Box 4, you will see a warning.

Check every figure against the client's spreadsheet and correct any cell before you press **Save**. Nothing is saved until you do. AI can make mistakes, and you remain responsible for the return you send to HMRC.

...or map the cells yourself

For a client's own spreadsheet, fill the mapping in directly:

1. **Excel Sheet Name** – the name of the worksheet *tab* along the bottom of Excel (for example **VAT**). It must match exactly, including spaces – it is not the filename.

2. **The nine cell references** — one per HMRC box, such as **B4**. Each must point at the cell holding that box's final figure.

Press **Save**. If the client would rather adopt a ready-made layout, the upload screen offers a **Download Example Front Sheet Excel File** that matches the default mapping out of the box.

 **VAT Return Settings**

VAT Submission Software 

Software Template (optional) 

Tax Optimiser

Select Template 

Not sure which cells to use?

 Find the cells with AI

VAT Return Cell Mapping
Which cells in your spreadsheet hold each of the nine HMRC VAT-return boxes.

Excel Sheet Name 

VAT

1 VAT due on sales 	2 VAT due on EC acquisitions 	3 Total VAT due 
B4	B5	B6
4 VAT reclaimed 	5 Net VAT due 	6 Total sales ex VAT 
B7	B8	B9
7 Total purchases ex VAT 	8 EC goods supplied ex VAT 	9 EC acquisitions ex VAT 
B10	B11	B12

Save

The nine boxes at a glance

- **Box 1** — VAT due on sales and other outputs.
- **Box 2** — VAT due on acquisitions of goods from EU member states (Northern Ireland traders only; 0 for most businesses).

- **Box 3** — total VAT due: Box 1 + Box 2.
- **Box 4** — VAT reclaimed on purchases and other inputs.
- **Box 5** — net VAT due to (or reclaimable from) HMRC: Box 3 – Box 4.
- **Box 6** — total value of sales excluding VAT, in whole pounds.
- **Box 7** — total value of purchases excluding VAT, in whole pounds.
- **Box 8** — total value of goods supplied to EU member states (NI traders only).
- **Box 9** — total value of goods acquired from EU member states (NI traders only).

Connect to HMRC: demo mode, then live with your agent account

Practise the HMRC connection in demo mode, then go live with your firm's agent account and let the client's periods flow in.

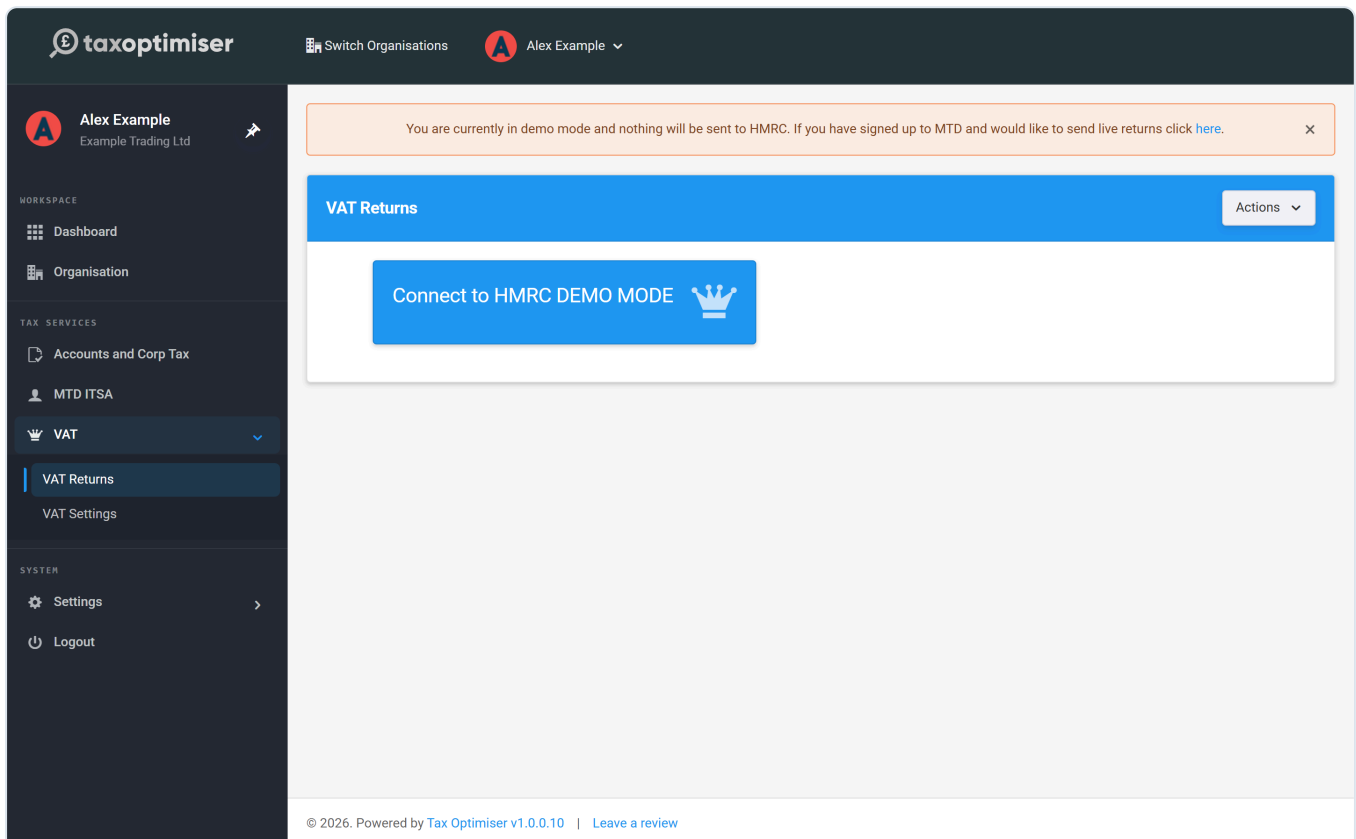
IN SHORT

- Periods (obligations) are pulled from HMRC, never typed in
- Demo mode is a safe rehearsal: nothing is sent to HMRC
- Connect using the agent account to cover all your clients at once
- The client must be signed up to MTD for VAT before you go live
- Authority lasts 18 months; Refresh from HMRC re-pulls periods

Under Making Tax Digital a client's VAT periods come *from* HMRC: once connected, Tax Optimiser pulls down their open and completed periods (HMRC calls them obligations) and you submit against them — you never type period dates in yourself. Every new client starts in **demo mode**, a safe sandbox where you can practise the whole journey without anything being sent to HMRC.

Practise in demo mode

Inside the client, open **HMRC VAT** → **VAT Returns**. A banner reminds you that nothing will be sent to HMRC. Click **Connect to HMRC DEMO MODE**.



You'll step through a simulation of HMRC's real connection flow, so there are no surprises when you do it for real: press **Continue**, then **Sign in** on the dummy login (no credentials needed in demo mode), and finally **Grant authority**.

Dummy Gateway

Test site

THIS IS A DUMMY VERSION OF THE HMRC PLATFORM

FOR SIMULATING TESTING WITH Tax Optimiser

Because this is a dummy site nothing will be sent to the HMRC site. **Tax Optimiser** needs permission to interact with HMRC on your behalf. To grant this authority, you'll need to:

1. Sign in to your Government Gateway account.
2. Grant authority to interact with HMRC on your behalf.

This authority will last for 18 months. You can [remove this authority](#) at any time.

► Details

Continue

[Cookies](#) [Privacy policy](#) [Terms and conditions](#) [Help using GOV.UK](#)

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Dummy Gateway

Authority to interact with HMRC on your behalf

The **Tax Optimiser** software application is requesting to do the following:

- View your VAT information
- Change your VAT information

It will be able to do the above for 18 months from when you grant authority. Just press Grant Authority

Grant authority [Do not grant authority](#)

Back on **VAT Returns** you'll see demo periods – one already *Fulfilled* (a completed return can't be submitted against) and one *Open* awaiting data. In demo mode you can reset this sample data at any time with **Actions** → **Reset Test Data**.



Switch Organisations

Alex Example

Alex Example

Example Trading Ltd

WORKSPACE

Dashboard

Organisation

TAX SERVICES

Accounts and Corp Tax

MTD ITSA

VAT

VAT Returns

VAT Settings

SYSTEM

Settings

Logout

You are currently in demo mode and nothing will be sent to HMRC. If you have signed up to MTD and would like to send live returns click [here](#).

VAT Returns

Actions

VAT Returns

Liabilities

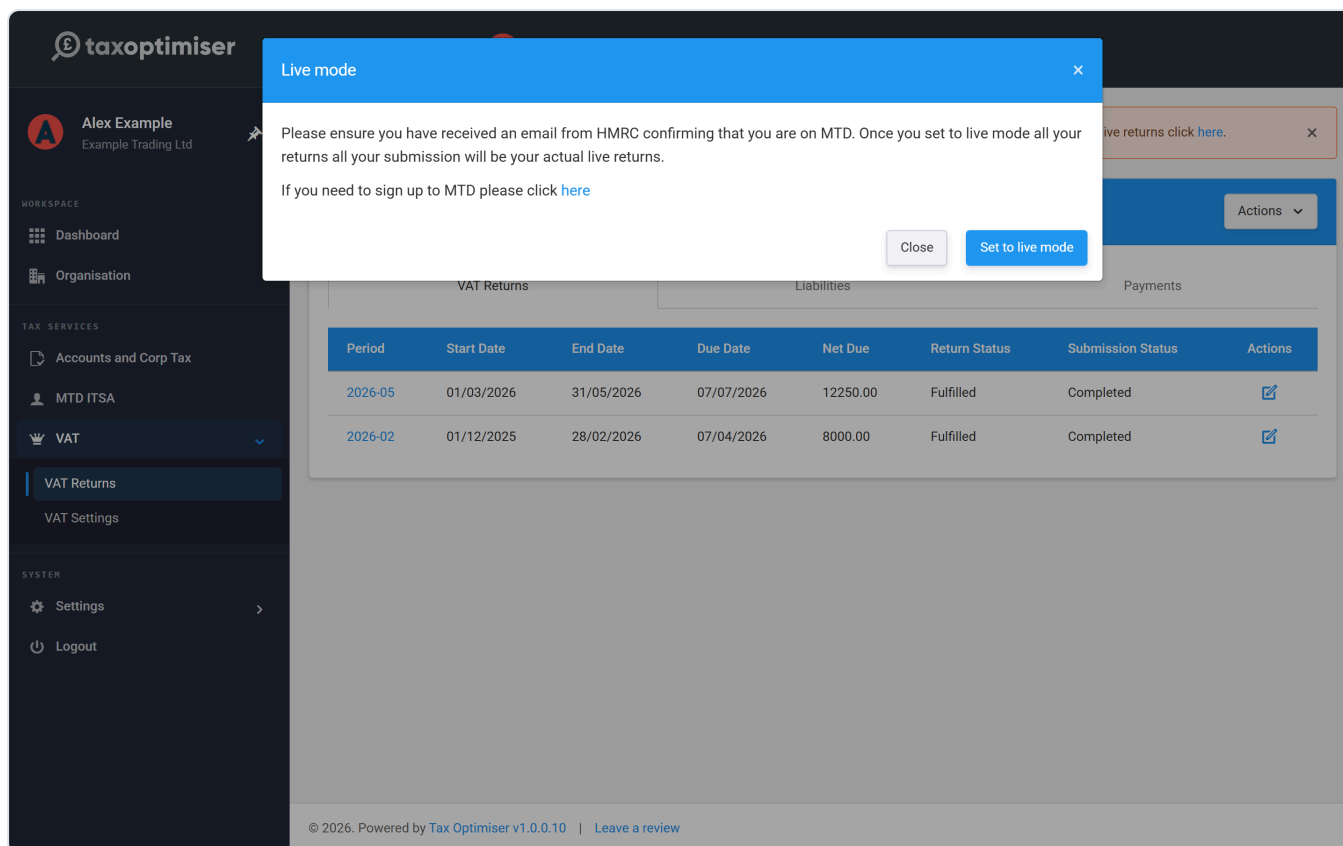
Payments

Period	Start Date	End Date	Due Date	Net Due	Return Status	Submission Status	Actions
2026-05	01/03/2026	31/05/2026	07/07/2026	12250.00	Open	Confirmation of data required	Edit
2026-02	01/12/2025	28/02/2026	07/04/2026	8000.00	Fulfilled	Completed	Edit

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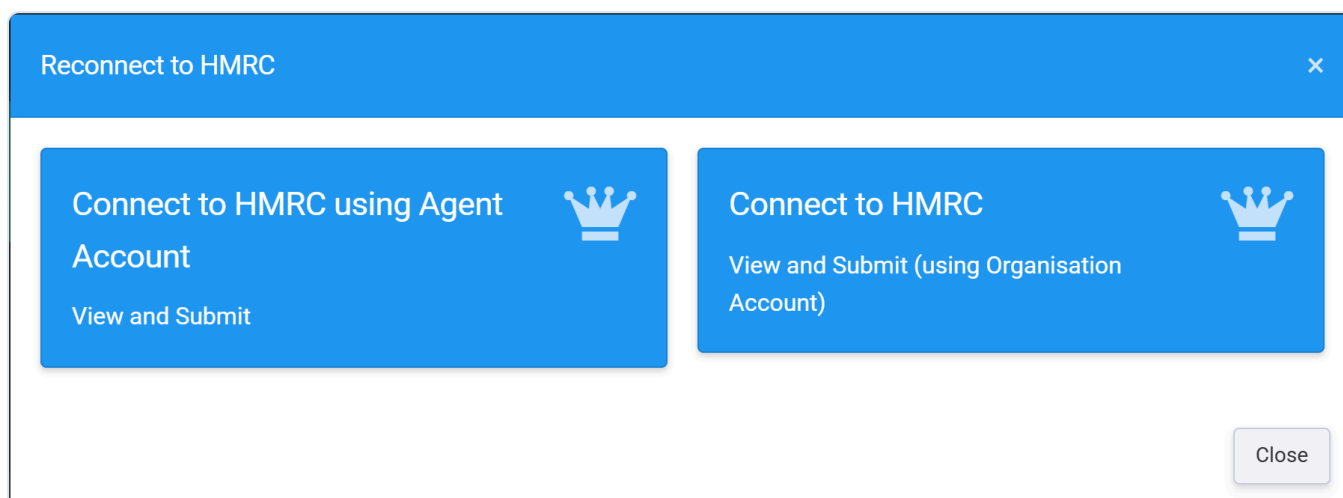
Switch to live mode

You do not need to sign the client up to **Making Tax Digital for VAT** before you file for real: HMRC signs up VAT-registered businesses automatically unless they are exempt, so there is no sign-up step and no confirmation email to wait for. When you're ready, click the link in the demo banner and confirm **Set to live mode**.



Connect with your agent account

You then choose how to connect. The same choice is available any time from **Actions** → **Reconnect to HMRC**. As an accountant, pick **Connect to HMRC using Agent Account** – this uses your firm’s HMRC agent services account, so the one authority lets you view and submit VAT for this and every other client you act for. (The other option, **Connect to HMRC (using Organisation Account)**, is for a business connecting its own Government Gateway login instead.)



You’re taken to HMRC’s gateway: press **Continue**, sign in with your **agent** Government Gateway credentials (HMRC may ask you to complete two-factor authentication), and finally **Grant authority** – this lets Tax Optimiser retrieve periods and submit returns on your behalf. The authority lasts 18 months; when it expires, reconnect from **Actions** → **Reconnect to HMRC**.

Your client's VAT periods arrive

HMRC returns the client's real VAT periods to the returns table. To work a period, click its link and follow the next article. We refresh periods intermittently, but if one you're expecting hasn't appeared — or you've just fixed an error — click **Refresh from HMRC** to re-pull everything.

Upload, check and send a client's VAT return

Upload the client's spreadsheet, check the nine boxes, accept the declaration and keep HMRC's receipt.

IN SHORT

- The uploaded file is the source of truth; boxes are read-only
- Fix figures in the spreadsheet and re-upload, not in the app
- Nil returns: reset values to zero, then submit as normal
- The receipt (form bundle number etc.) is the client's proof of filing
- Errors: fix and retry; reconnect if your authority has expired

Each quarter you upload the client's spreadsheet to their open period, Tax Optimiser fills the nine boxes from the cells you mapped, you check them, and you send. The boxes are read-only – the uploaded file is always the source of truth, which is exactly what Making Tax Digital's digital-links rules want.

Open the return and upload the file

On **VAT Returns**, click the period link of the *Open* return. You'll see the return's dates and status, the nine boxes at zero, and an **Upload File** panel. Drag the client's file onto the upload area, or click it to browse – Excel files (.xlsx, .xls, .xlsm) and .csv are accepted. Processing takes a few seconds and the page updates itself; the file stays on the return so you can **Download** it later or **Delete** it and upload a corrected version.

If the upload fails because the sheet or a cell in VAT Settings doesn't match the client's file, the error message offers **Review settings with AI**. It reads the file you just uploaded and suggests the sheet and cells, showing the figure it found in each one. As in VAT Settings, the file is sent to a third-party AI provider and you confirm that first. Check the figures, then press **Save and re-process file**. The new settings are saved and the same file is read again, without uploading it a second time.

Switch Organisations

Alex Example

Alex Example
Example Trading Ltd

WORKSPACE

Dashboard

Organisation

TAX SERVICES

Accounts and Corp Tax

MTD ITSA

VAT

VAT Returns
VAT Settings

SYSTEM

Settings

Logout

You are currently in demo mode and nothing will be sent to HMRC. If you have signed up to MTD and would like to send live returns click [Here](#).

VAT Return

Details
Audit Log

Start Date

01/03/2026

End Date

31/05/2026

Due Date

07/07/2026

HMRC Status

Open

Submission Status

Confirmation of data required

Values

1. VAT due on sales

0.00

2. VAT due in the period on acquisitions of goods made in Northern Ireland from EU Member States

0.00

3. Total VAT due

0.00

Upload File

Drop file to upload
or CLICK

Download Example Front Sheet Excel File

Download Example Excel File with Transaction

To change the what sheet and cells to extract the data from, please change the settings [here](#)

Check the nine boxes

The boxes now show what was read from the spreadsheet – check them against the client’s records before sending. In our example the quarter’s standard-rated sales were £85,400, so Box 1 shows £17,080.00 of output VAT, Box 4 reclaims £4,830.00 of input VAT, and Box 5 lands on £17,080 – £4,830 = **£12,250.00** net VAT due. If a box is wrong, fix the cell in the spreadsheet and upload again – don’t re-point the mapping unless the layout itself changed. For a **nil return**, use **Actions** → **Reset all values to zero** rather than uploading a file of zeros – you still have to submit it.

Switch Organisations

Alex Example

Alex Example
Example Trading Ltd

WORKSPACE

Dashboard
Organisation

TAX SERVICES

Accounts and Corp Tax
MTD ITSA
VAT

VAT Returns
VAT Settings

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Settings
Logout

You are currently in demo mode and nothing will be sent to HMRC. If you have signed up to MTD and would like to send live returns click [Here](#).

VAT Return

Details

Audit Log

Start Date

01/03/2026

End Date

31/05/2026

Due Date

07/07/2026

HMRC Status

Open

Submission Status

Confirmation of data required

Values

1. VAT due on sales

17080.00

2. VAT due in the period on acquisitions of goods made in Northern Ireland from EU Member States

0.00

3. Total VAT due

17080.00

Upload File

Drop file to upload or CLICK

Download Example Front Sheet Excel File
Download Example Excel File with Transaction

To change the what sheet and cells to extract the data from, please change the settings [here](#)

Uploaded File

1106260728demo-vat-return.xlsx

Send and keep the receipt

Click **Send VAT Return**. The declaration is the legal confirmation HMRC requires that the figures are true and complete – only accept it once you’ve checked the boxes. You can add an internal note (it stays in Tax Optimiser). Click **Accept**.

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Alex Example

Example Trading Ltd

Workspace

Dashboard

Organisation

Tax Services

Accounts and Corp Tax

MTD ITSA

VAT

VAT Returns

VAT Settings

System

Settings

Logout

Declaration

When you submit this VAT information you are making a legal declaration that the information is true and complete. A false declaration can result in prosecution.

1. VAT due on sales

17080.00

2. VAT due in the period on acquisitions of goods made in Northern Ireland from EU Member States

0.00

3. Total VAT due

17080.00

4. VAT reclaimed in the period on purchases and other inputs (including acquisitions in Northern Ireland from EU member states)

4830.00

5. Net VAT Due to be paid to customs or reclaimed by you

12250.00

6. Total value of sales and all other outputs ex VAT

85400

7. Total value of purchases and all other inputs excluding any VAT

31200

8. Total value of dispatches of goods and related costs (excluding VAT) from Northern Ireland to EU Member States

0

9. Total value of acquisitions of goods and related costs (excluding VAT) made in Northern Ireland from EU Member States

0

8demo-vat-return.xlsx

Download

Delete

↑

The return is submitted to HMRC using the authority you granted, and the **Submission Status** moves to *Submission Accepted* — the screen updates itself. On acceptance the **HMRC Confirmation Receipt** fills in: the **Processing Date**, the **Payment Indicator**, the **Form Bundle Number** and, where money is due, a **Charge Ref Number**. These are generated by HMRC and are your client's proof the return was filed; **Generate Receipt** turns them into a PDF you can keep or send on. In demo mode the cycle completes instantly and nothing leaves Tax Optimiser.

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VAT Returns

VAT Settings

System

Settings

Logout

VAT Return

Actions

Details

Audit Log

Start Date

01/03/2026

End Date

31/05/2026

Due Date

07/07/2026

HMRC Status

Fulfilled

Submission Status

Completed

Values

1. VAT due on sales

17080.00

2. VAT due in the period on acquisitions of goods made in Northern Ireland from EU Member States

0.00

3. Total VAT due

17080.00

Uploaded File

1106260728demo-vat-return.xlsx

Download

Delete

HMRC Confirmation Receipt

HMRC Processing Date

11/06/2026

Payment Indicator

BANK

Form Bundle Number

256660290587

Charge Reference Number

aCxFaNx0FZsCvyWF

Generate Receipt

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HMRC Confirmation Receipt

**HMRC
Processing
Date**



11/06/2026

**Paymen
t
Indicato
r**

BANK

**Form
Bundle
Number**

256660290587

**Charge
Ref
Number**

aCxFaNx0FZsCvyWF

Generate Receipt



If you have made a mistake,  don't worry. Unfortunately HMRC don't allow changes through software, but you can correct the error on your next return or report it to HMRC, depending on its size. Our guide [Amending a VAT return after it has been sent](#) explains how.

The full rules are in section 4 of [HMRC's guidance on correcting VAT errors](#). You can also call the HMRC VAT Helpline on 0300 200 3700.

If something goes wrong

A rejected return shows the HMRC error and the status changes to *Submission Error* — fix the cause and send again with **Retry sending VAT return**. If the error doesn't make sense, contact support@taxoptimiser.co.uk. Two cases worth knowing: if your **authority has expired** the error links you

straight to the reconnect flow; and an **“already submitted”** warning means HMRC has the return on file already (filed here or elsewhere) — check the period in HMRC and confirm it filed.

Give clients access to their organisation

Give a client a login to their own organisation - they only ever see the organisations they belong to.

IN SHORT

- Give clients a login from the organisation's Individuals tab
- Only first name, last name and email are needed
- Choose Send Credentials and they get a link to set a password
- Clients only see organisations they belong to
- The other details are for later (e.g. Self Assessment)

You can give a client a login to their own organisation — handy when they upload their own VAT spreadsheet or just want to see their returns. They'll only ever see the organisations they belong to, never your other clients.

Add an individual

Inside the client organisation, click **Individuals**, then **Add New**. You only have to enter the **first name**, **last name** and **email address**, and choose **Send Credentials**. The person then receives an email with a link to set their own password.

Client

First Name

Last Name

Email

Send Credentials



Phone Number

**National Insurance
Number**

Personal UTR

Address Line 1

Address Line 2

Address Line 3

Address Town

Address Postcode

The rest can wait

The other details on the individual's record are used later for things like Self Assessment — you don't need them just to give VAT access, so leave them for now and come back when needed.

Add additional accountants to your firm

Add colleagues to your firm so they can act for your clients with their own login.

IN SHORT

- Add colleagues from Firm Settings, Accountants, Add New
- Only first name, last name and email are needed
- Optionally mark them as an admin or journal approver
- They get an email invite with a link to set their password
- Firm users can then work across all your clients

If colleagues work on VAT alongside you, add them to the firm so they can act for your clients with their own login.

Add a firm user

Go to **Firm Settings** → **Accountants**, then **Add New**. You only need the **first name**, **last name** and **email address**; you can optionally tick **Is an admin** or **Can approve journals** to set their permissions. Press **Save** and they'll receive an email with a link to create a password, after which they can sign in and work across your firm's clients.

Accountant

First Name	
Last Name	
Email	
Can approve journals	☐
Is an admin	☐
Has restricted organisations	☐
CRM Id	

This is used when integrating with another practice management system

Save

Set their permissions

A few optional tick-boxes control what a new colleague can do: **Is an admin** gives them full access to firm settings, including adding further users; **Can approve journals** lets them sign off journals where your firm uses approvals; and **Has restricted organisations** limits them to specific clients rather than the whole firm. Leave them all unticked for a standard user who simply files for clients.