Managing Assistants

If you have assistant accounts set up for administering your client's VAT returns, you can see them in online services. Select Accounts from the online services menu.

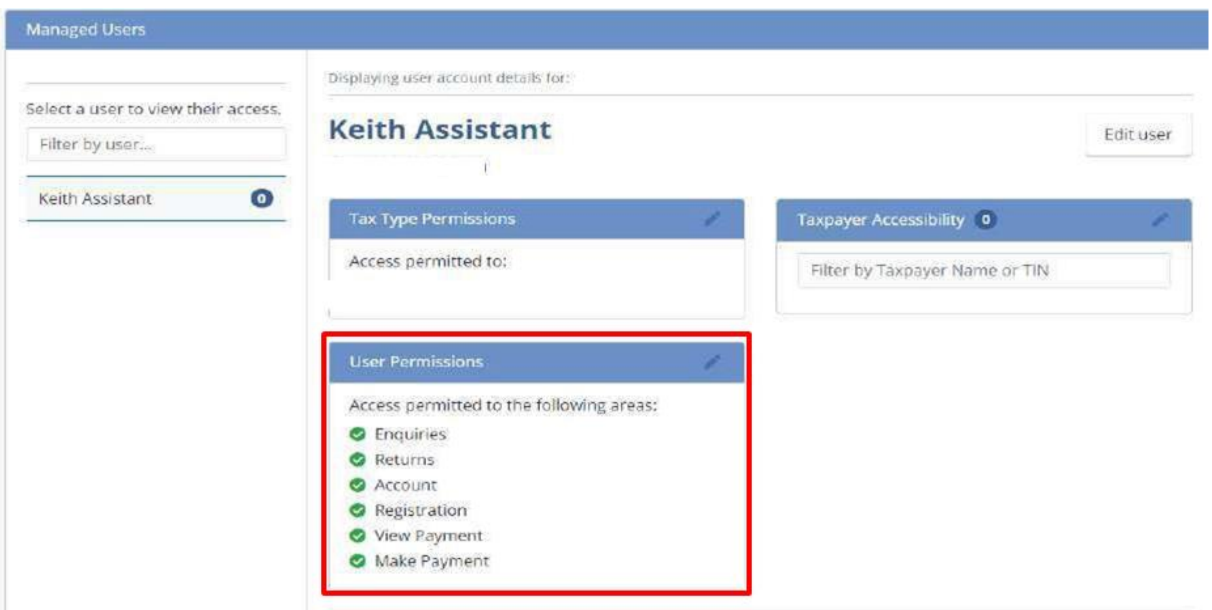
This will show you the list of currently active assistant accounts on this account. You can add or disable assistants through this menu.

Managing assistant's permission levels

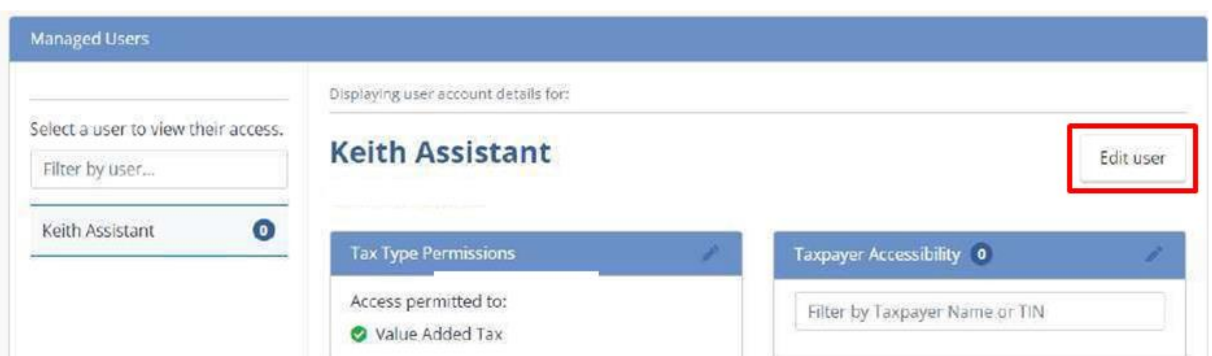
Once the assistant has completed the initial login, the main agent should now have the ability to manage their assistant's permission. To do this you must logged on in the Customs and Excise Online Portal.

From the menu under the main agent account name, select Manage User Access.

Here you can see all your assistants and their current permission levels.

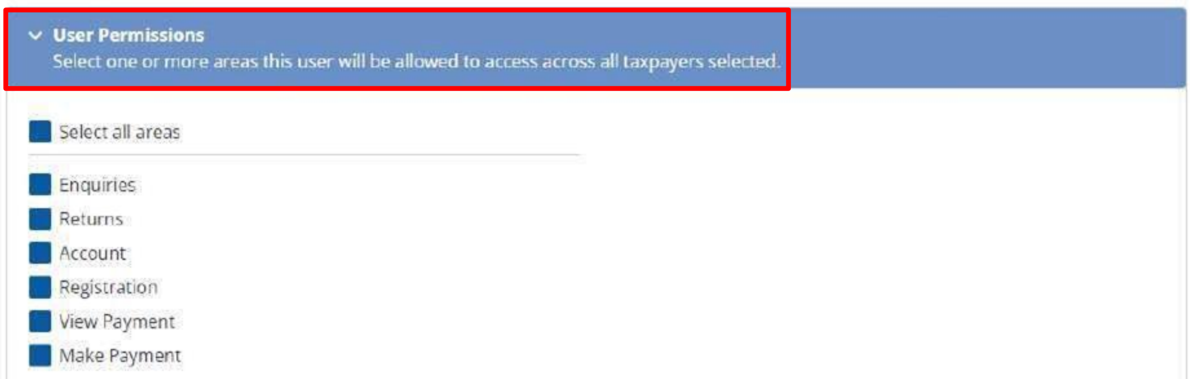


To amend an assistant's permissions, click Edit User.

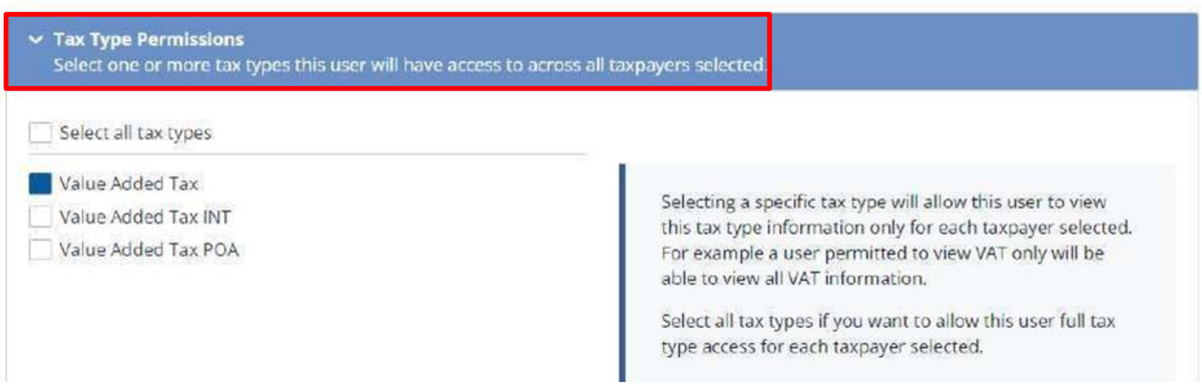


User details allows you to update their personal information.

User permissions allows you to amend the access an assistant has to the areas in a client's online account.

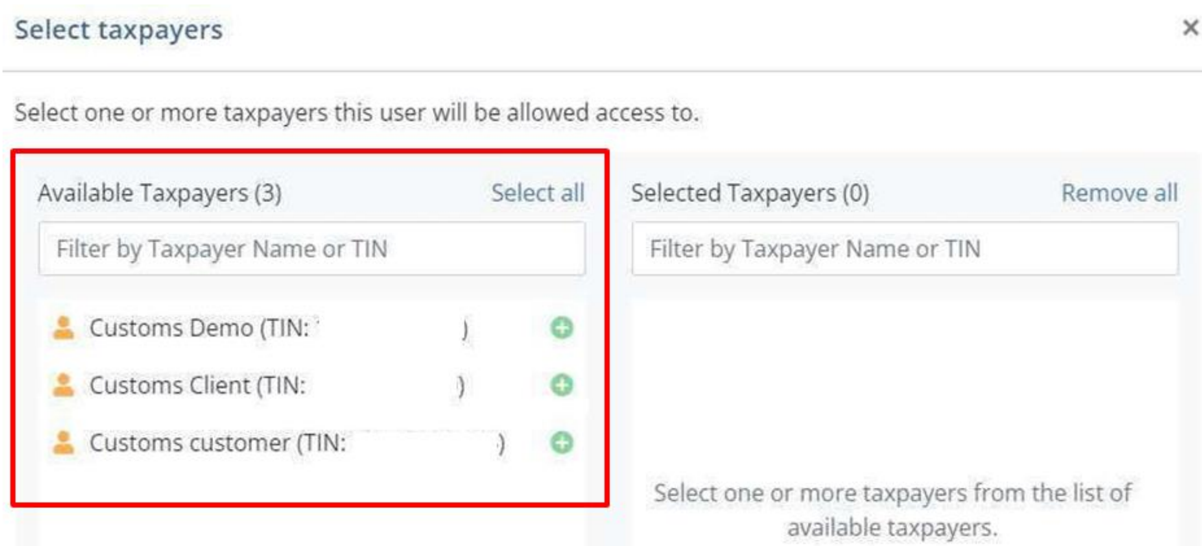


Tax Type permissions allows you to select which client tax types your assistant will have access to.

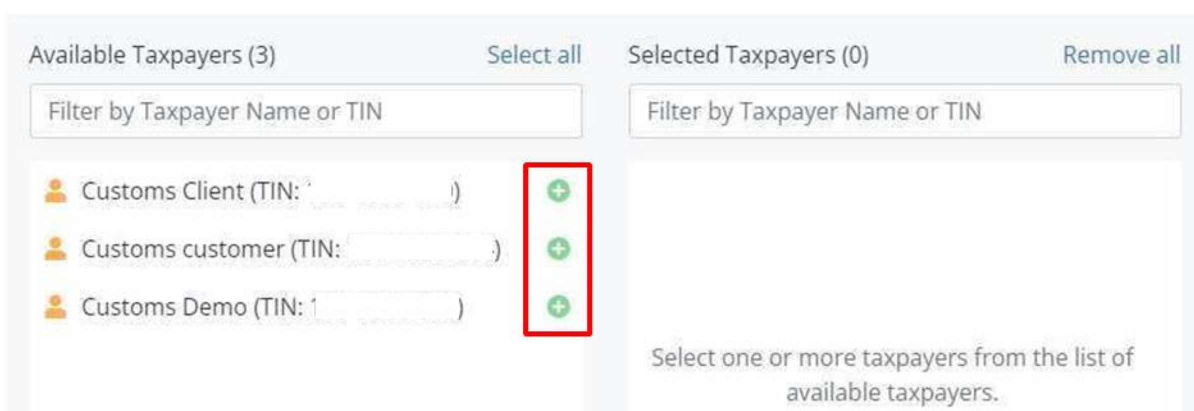


Taxpayer Accessibility allows you to allocate clients to your assistant. Click the Manage Taxpayers button.

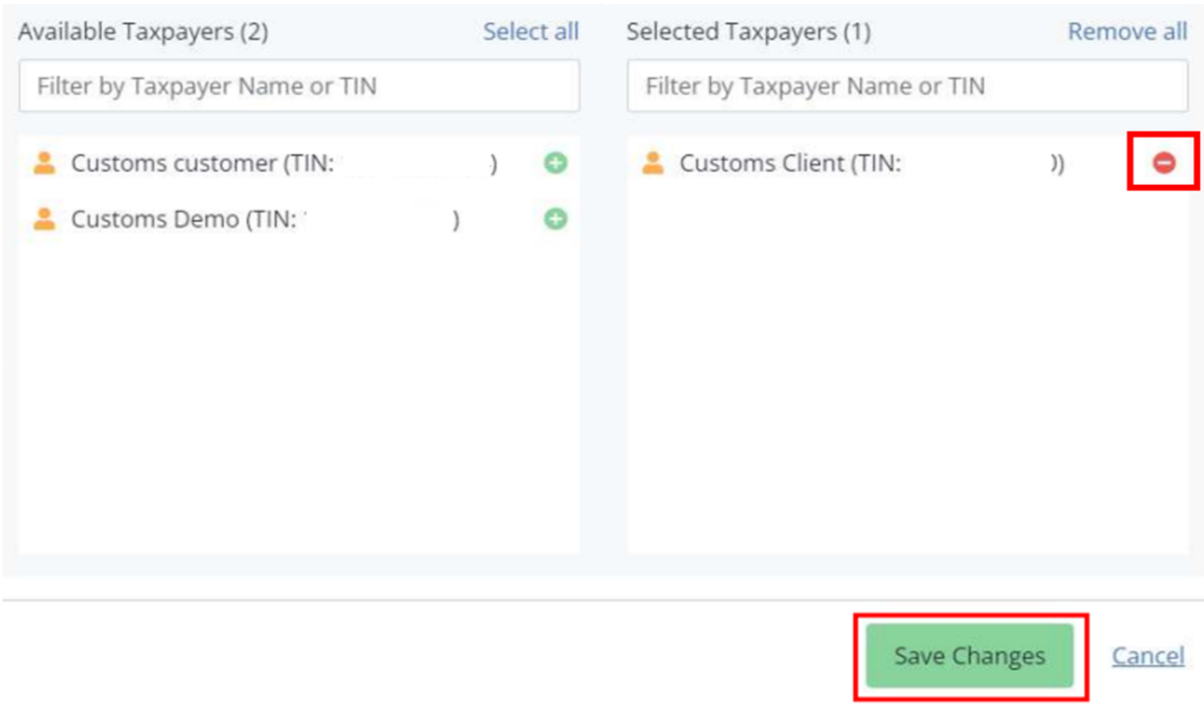
This gives you a full list of all available clients on the left, and clients allocated to this assistant on the right.



To add a client to this assistant, click on the green plus. This moves them to the assistant's list.



To remove a client from this assistant, click the red minus. This moves them to the available client's list. Once all moves have been completed, click Save Changes.



When the assistant next signs in they will have access to those clients that you have allocated to them.