RMS – Customs and Excise new Online System
Assistant Accounts

This document explains the process to re-confirm assistant accounts in the new Customs system which is being rolled out on the 21st November 2022.

Check if you have assistants set up

If you have assistant accounts set up for administering your clients VAT returns, you can see them in online services. Select "Account" from the menu.

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

RMS – Customs and Excise new Online System
Assistant Accounts

Signing into RMS for the first time.

The main agent account will be migrated with all your clients. When the main agent signs in for the first time on the new system, you will see the full client list. Assistant accounts will still exist but won't automatically have access to the client list. The following process needs to be followed to set up assistant permissions.

Main Agent initial log in process

Main agent signs into Online Services for the first time after the new system goes live, and navigates to "Customs and Excise" section of online services
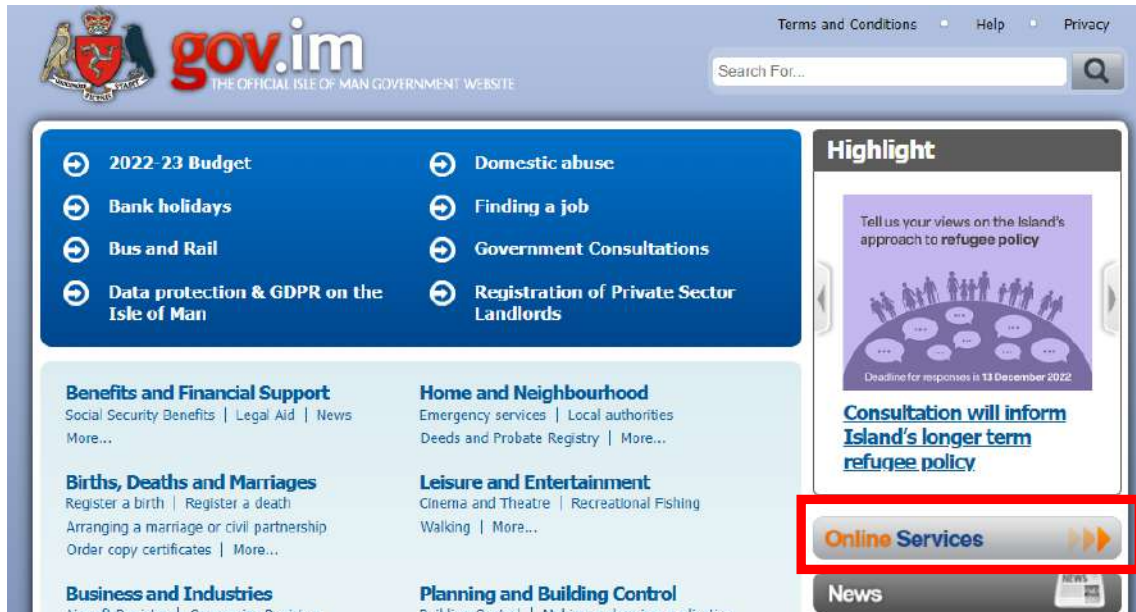
The new system will only have 2 options, "customs general payments" and "online portal". Select online portal.

The first time the main agent signs into the online portal, they will need to authenticate the login. The following page will appear and the main agent will need to click approve if the information is correct. If the information is incorrect please call Customs & Excise on 648120.

Approve claims for service:

In order to use the VATRMS service, the following information must be provided to the department responsible for the service

accname [Sally Agent Ltd]	The name associated with the account the user belongs too
usrname [Sally Agent]	The user name i.e. full name typed into online services at registration
email	The email address against the user
phone [01624123456]	The phone number against the user
dob [1980-02-15]	Users date of birth as entered at registration

Approve

Once this has been completed, the main agent should have access to their full client list.

UAT version 1.0.2.0
lho version 3.1.2.81

Customs & Excise Division site ↗   Contact us   🔵 Greg davies ▾

online services
Isle of Man Government Customs & Excise Division

🏠 Home   Inbox ▾

Hi Greg

Taxpayers associated with your user account are displayed below. Select a taxpayer from the list below to view their account.

Your Registered Taxpayers

Click the view link to select a taxpayer.

Search:

Taxpayer	▲ TIN ⬍
📄 Alex Horne Limited	
📄 Greg Davies Limited	
📄 Sarah Millican Limited	

Showing 1 to 3 of 3 entries

Previous **1** Next

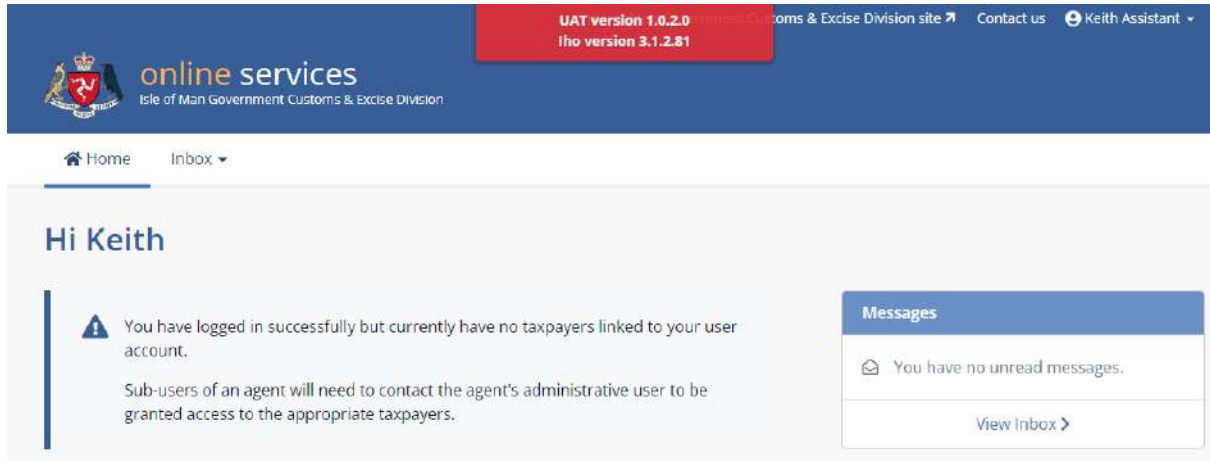**Messages**

✉ You have no unread messages.

View Inbox ❯

RMS – Customs and Excise new Online System
Assistant Accounts

### *Assistants initial log in process*

Assistants need to log in as per the main agent initial log in process and complete the login authentication.

Assistants will receive a message to say they need to contact their agent for access to clients.

Main agent assigning permission to assistants

Once the assistant has completed the initial log in, the main agent should now have the ability to manage their assistant's permissions. To do this, go to Customs & Excise online services
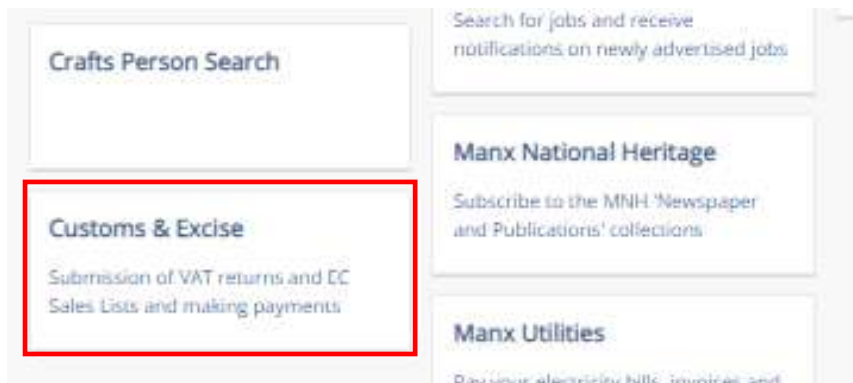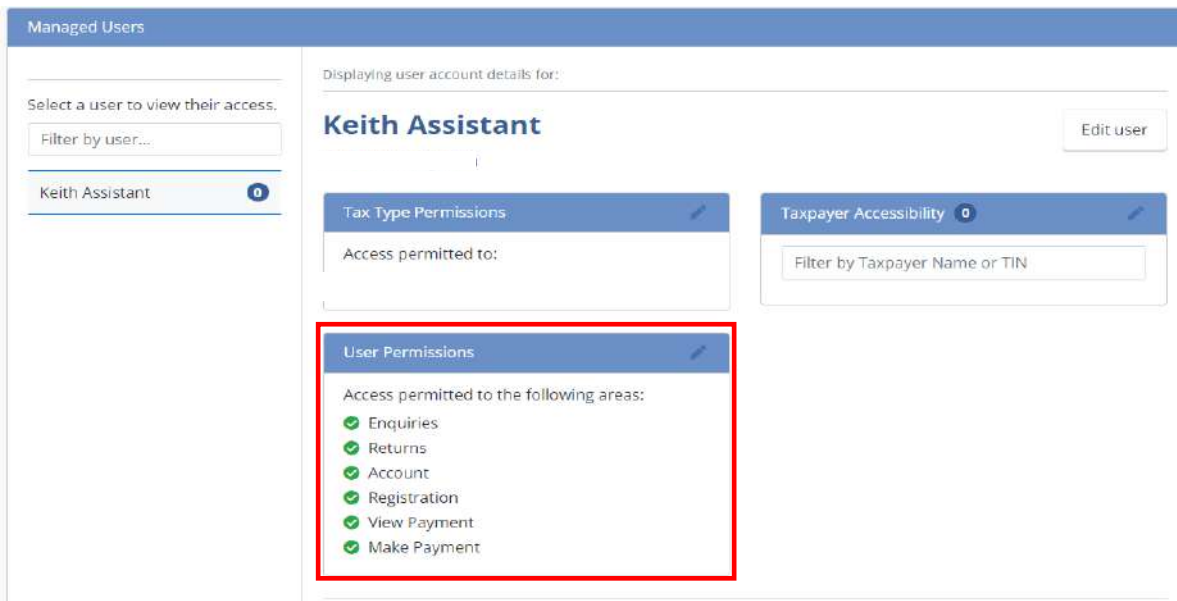

Select the "Online Portal" option

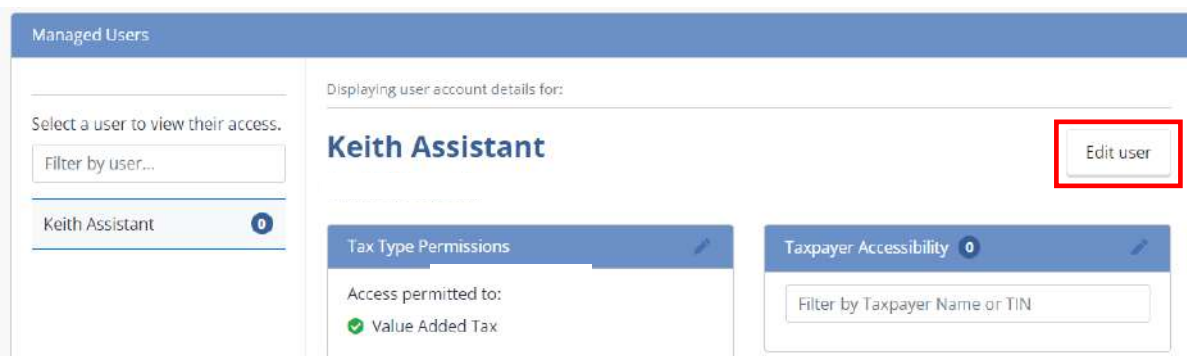# RMS – Customs and Excise new Online System
Assistant Accounts

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

Here you can see all the assistants and what permissions they currently have.

To amend the assistants permissions click Edit User

RMS – Customs and Excise new Online System
Assistant Accounts

User Details allows you to update their personal information.

User Permissions allows you to amend what access assistant have, to the areas in the clients online account.

Tax Type Permissions allows you to select which client tax types you want assistants to see.

Tax Payer Accessibility allows you to allocate clients to your assistant.

RMS – Customs and Excise new Online System
Assistant Accounts

To do this click manage taxpayers

This gives you a menu of the clients available for selection on the left and the taxpayers the assistant currently has access to on the right.

To add them to the assistant list click on the green plus

This moves them to the assistants list

RMS – Customs and Excise new Online System
Assistant Accounts

To remove them click the red minus

Once finished click save changes.

When the assistant signs in again they should now have access to the clients you have added to their account.