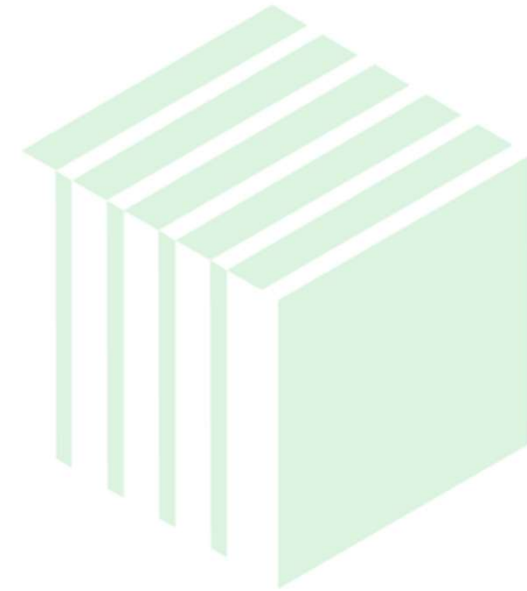


Initial Set up of a business in the MTD Express system user guide

MTD Express Setup

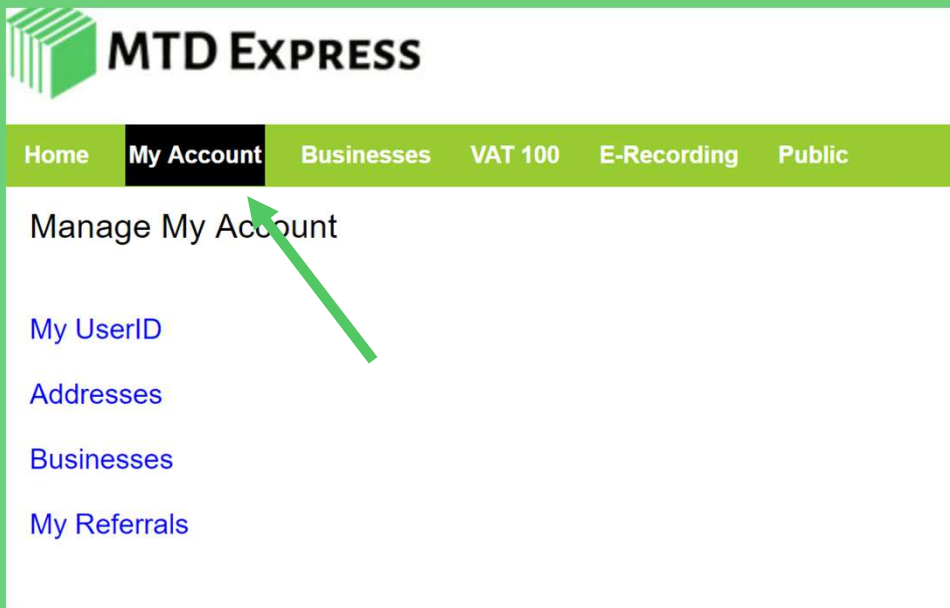
- This guide will take you the step by step process of setting up your first business and registering the MTDEXpress.co.uk service for that business with the HMRC
- You will have to follow this process for each business you wish to use the MTDEXpress.co.uk Bridging software



MTD EXPRESS

Step 1 – Review My Account

- Once you have logged in click on My Account
- You can manage your account under My UserID as shown on the right



MTD EXPRESS

Home **My Account** Businesses VAT 100 E-Recording Public

Manage My Account

My UserID

Addresses

Businesses

My Referrals



Manage My UserID

Main Details Password and Communication Details My Referral Code More Functions Multi User Record Detail

Save

Title Mr

Firstname User

Lastname Guide

Job Title / Capacity Test User

Company MTD Demo co

Country United Kingdom - GB


Skype optional - For Support and Training

MTD EXPRESS

Step 2 Set up Primary Address

- To set up your first Business you next to set up your primary address
- Click on Addresses
- This will take you to the address maintenance screen, enter your address and save



 **MTD EXPRESS**

[Home](#) **[My Account](#)** [Businesses](#) [VAT 100](#) [E-Recording](#) [Public](#)

Manage My Account

[My UserID](#)

[Addresses](#) ←

[Main Details](#) [Other](#) [More Functions](#) [Record Detail](#)

Address Line 1

Address Line 2

Town/City

County

PostCode


Country

Owner User ID

MTD EXPRESS

Step 3 – Set up your first business

- To setup your first business click on Businesses
- This will take you to the Business home page click on New Business to take you to the Business maintenance page shown to the right
- Enter your business details and attach an address to the business




Home My Account **Businesses** VAT 100 E-Recording Public

Manage My Account

[My UserID](#)

[Addresses](#)

[Businesses](#) ←



Home My Account **Businesses** VAT 100 E-Recording Public

Main Details HMRC Authorisation Other Invoicing More Functions Record Detail

Save

Business Name MTD Demo co

Business Type Limited Company (Ltd) - (1)

Country United Kingdom - GB

Company Registration Number 6543124

VAT Registration Number 666036234

Preference for Services or Goods Services

Is Group Registration Not Group Group

Is Cash Accounting No Cash Basis

Is Flat Rate Scheme No Yes

VAT Quarter End Jan, Apr, Jul, Oct

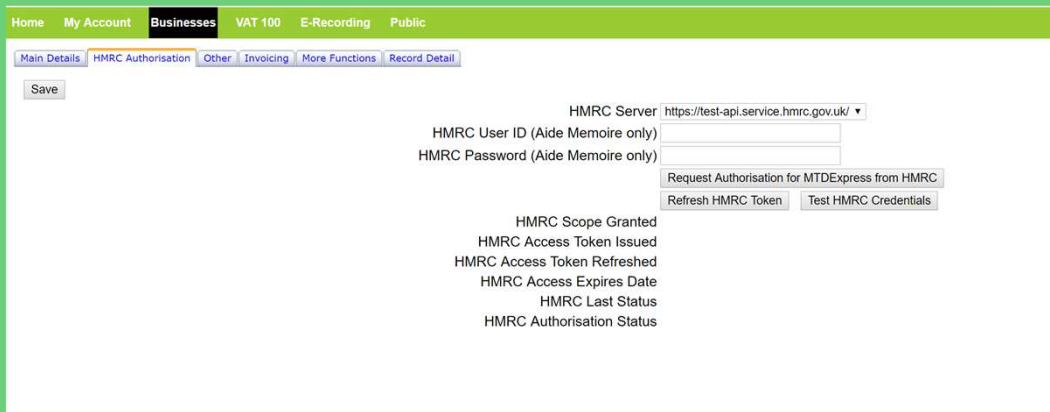
Address [Manage](#) 24 Test Street MTD ville West Sussex - (16)

Owner User ID Mr User Guide

MTD EXPRESS

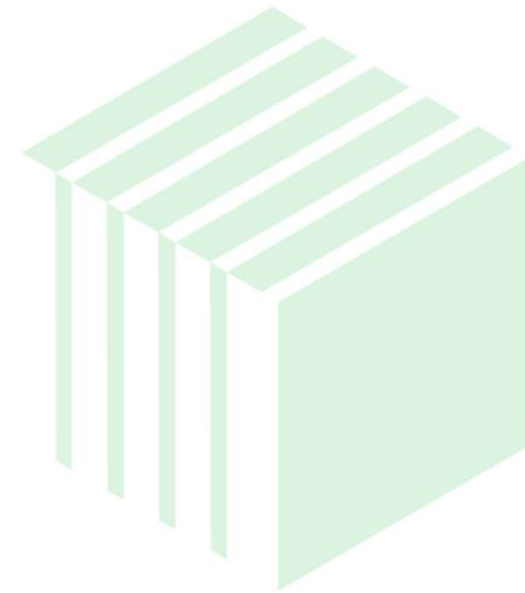
Step 4 – Obtain HMRC Authorisation for you first business

- Click on the HMRC authorisation tab to go the screen below
- Click save to confirm the HMRC server
- Click on Request Authorisation for MTD Express from HMRC



The screenshot shows a web application interface for HMRC Authorisation. The top navigation bar includes 'Home', 'My Account', 'Businesses', 'VAT 100', 'E-Recording', and 'Public'. Below this, a sub-navigation bar contains 'Main Details', 'HMRC Authorisation', 'Other', 'Invoicing', 'More Functions', and 'Record Detail'. A 'Save' button is located on the left. The main content area contains the following fields and buttons:

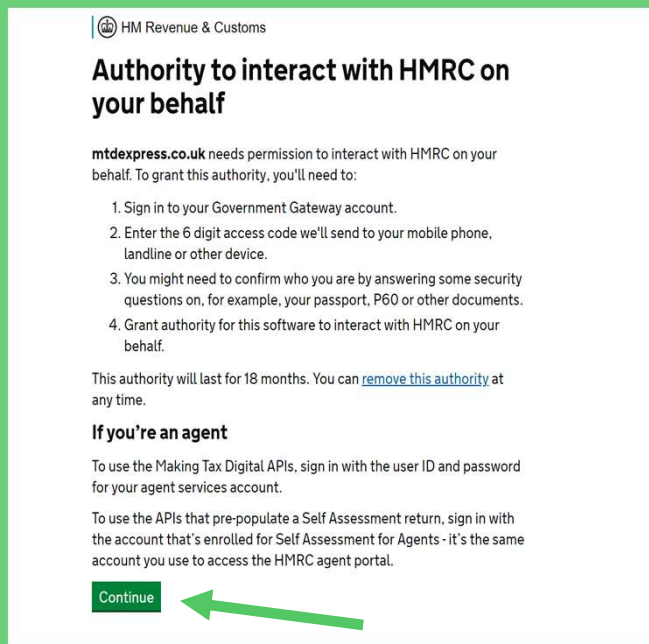
- HMRC Server:
- HMRC User ID (Aide Memoire only):
- HMRC Password (Aide Memoire only):
- Buttons: 'Request Authorisation for MTDExpress from HMRC', 'Refresh HMRC Token', and 'Test HMRC Credentials'
- Fields for status: 'HMRC Scope Granted', 'HMRC Access Token Issued', 'HMRC Access Token Refreshed', 'HMRC Access Expires Date', 'HMRC Last Status', and 'HMRC Authorisation Status'



MTD EXPRESS

Step 5 – HMRC Process

- Once you have completed Step 4 you will be taken to the HMRC web site
- Follow the instructions as per the screenshots on this slide



HM Revenue & Customs

Authority to interact with HMRC on your behalf

mtdexpress.co.uk 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. Enter the 6 digit access code we'll send to your mobile phone, landline or other device.
3. You might need to confirm who you are by answering some security questions on, for example, your passport, P60 or other documents.
4. Grant authority for this software to interact with HMRC on your behalf.

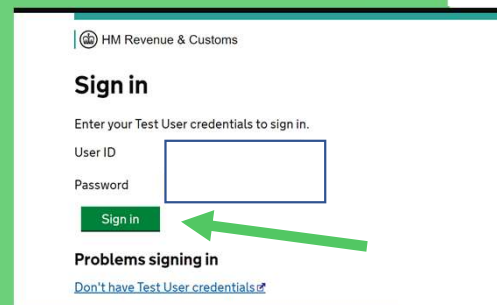
This authority will last for 18 months. You can [remove this authority](#) at any time.

If you're an agent

To use the Making Tax Digital APIs, sign in with the user ID and password for your agent services account.

To use the APIs that pre-populate a Self Assessment return, sign in with the account that's enrolled for Self Assessment for Agents - it's the same account you use to access the HMRC agent portal.

Continue



HM Revenue & Customs

Sign in

Enter your Test User credentials to sign in.

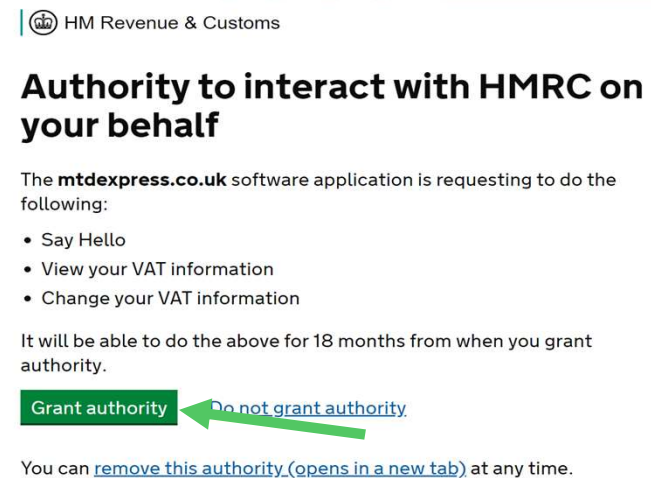
User ID

Password

Sign in

Problems signing in

[Don't have Test User credentials?](#)



HM Revenue & Customs

Authority to interact with HMRC on your behalf

The **mtdexpress.co.uk** software application is requesting to do the following:

- Say Hello
- View your VAT information
- Change your VAT information

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

Grant authority [Do not grant authority](#)

You can [remove this authority \(opens in a new tab\)](#) at any time.

Step 6 – You are now set up

- Once you have completed Step 5 you will be taken back to the MTD Express system
- You should see that the HMRC Authorisation Status is GOOD , and your business' information should be in the grid view in the Businesses home page

Main Details | HMRC Authorisation | Other | Invoicing | More Functions | Record Detail

Save

HMRC Server: <https://test-api.service.hmrc.gov.uk/>

HMRC User ID (Aide Memoire only):

HMRC Password (Aide Memoire only):

Request Authorisation for MTDEExpress from HMRC

Refresh HMRC Token | Test HMRC Credentials

HMRC Scope Granted hello read:vat write:vat

HMRC Access Token Issued 06/02/2019 09:37:43

HMRC Access Token Refreshed 06/02/2019 09:37:43

HMRC Access Expires Date 06/08/2020 09:37:43

HMRC Last Status 06/02/2019 09:37:43

HMRC Authorisation Status **GOOD**

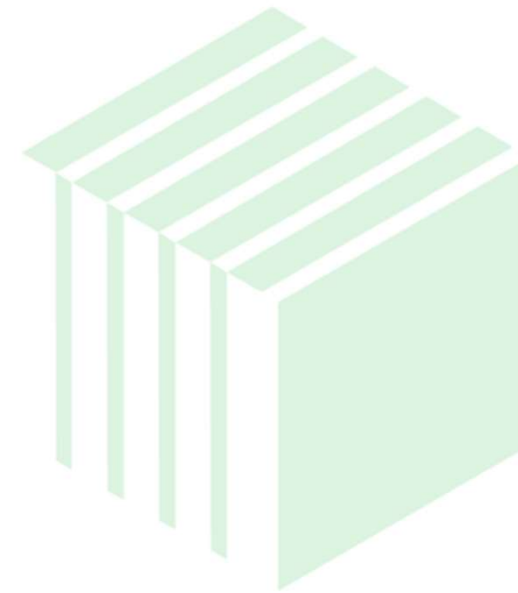
MTD EXPRESS Account Support Out

Home My Account **Businesses** VAT 100 E-Recording Public

New Business Download

Filter

#	Edit	Business Name	VAT Registration Number	Company Registration No	Country Code	Quarter Description	Modified by User	Modified by Date	HMRC Authorisation Status
1	Edit	MTD Demo co	666038234	6543124	GB	Jan, Apr, Jul, Oct	Mr User Guide (39)	06/02/2019 09:34:35	GOOD



MTD EXPRESS

- You are now ready to submit your returns using the [MTDExpress.co.uk](https://www.mtdexpress.co.uk) bridging software
- To actually submit a return using the system please review our [Submitting a VAT return guide](#)



MTD EXPRESS