

How to Set up Making Tax Digital

Procedure

Making tax digital – making tax easy - Become compliant with HMRC's MTD for VAT.

Here at Lineal we've been working closely with HMRC to make sure you know exactly what to do and when to do it by providing a simple step by step guide to walk you through the process to set up MTD and submitting your VAT returns moving forward.

1. Prior to setting up MTD please ensure you have your HMRC govt gateway login name and password. You will need your HMRC User ID and password for the HMRC website, and your VAT number for sign in. Your access may also be linked to a mobile phone number or email so please ensure you have this device/details to hand.
2. Once you have enrolled for MTD, you will no longer be able to submit data in the previous way, so before progressing make sure you have completed all of your old filing processes first.
3. If you need to double check whether you have registered for MTD, please go to the HMRC Government Gateway and login to your account, you can get to the page by clicking on the following link and clicking on the green Sign in button <https://www.gov.uk/log-in-register-hmrc-online-services>. If you scroll down you will see whether or not you are registered, the example below is of someone who has just registered by following the steps and filling in the information requested on the HMRC portal.

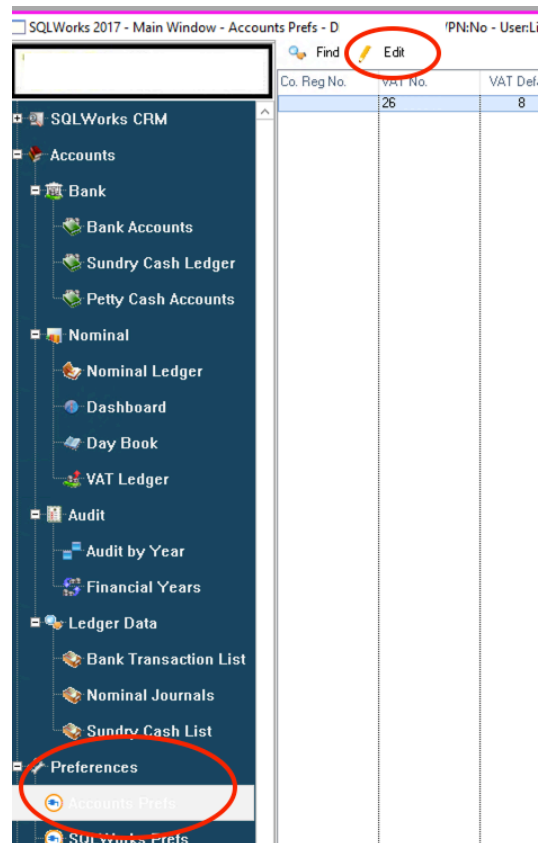
Your Making Tax Digital for VAT account is being set up

You were recently signed up to the new Making Tax Digital service. This is so you can submit your VAT Returns to HMRC using compatible software.

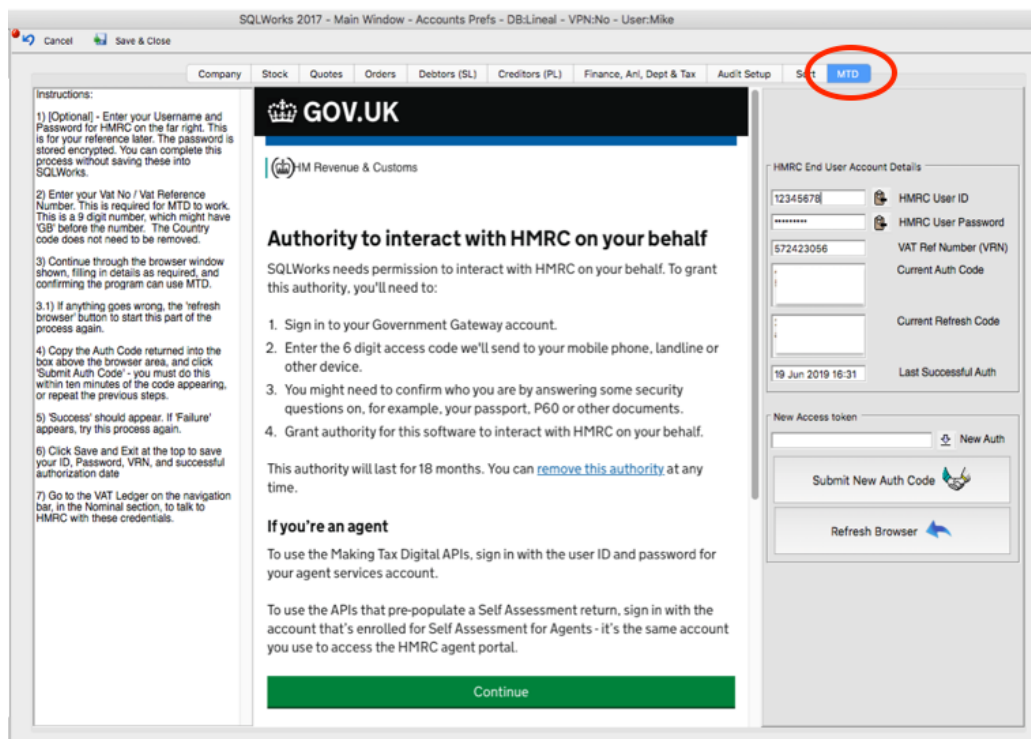
It will take up to 72 hours for your account to be set up.

Check back again later.

4. In the left-hand side panel go to preferences and select Account prefs and click edit.



5. Click on the MTD tab on the far right—there are a list of instructions on the left that may also help with this process and select continue.
(Please note if the MTD tab is missing check your user privileges).



5. Insert your details as requested, you can use the brown paste icons next to your HMRC User ID and password to copy, then paste into the relevant field.

SQLWorks 2017 - Main Window - Accounts Prefs - DB:Lineal - VPN:No - User:Mike

Cancel Save & Close

Company Stock Quotes Orders Debtors (SL) Creditors (PL) Finance, Anl, Dept & Tax Audit Setup Sort **MTD**

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BETA This is a new service - your [feedback](#) will help us to improve it

English | [Cymraeg](#)

Sign in using Government Gateway

Government Gateway user ID
This could be up to 12 characters.

EK8I

Password
.....

Sign in

[Create sign in details](#)

Problems signing in

[I have forgotten my password](#)

[I have forgotten my Government Gateway user ID](#)

[Get help with this page](#)

HMRC End User Account Details

HMRC User ID
EK8KAS

HMRC User Password
.....

VAT Ref Number (VRN)
572423056

Current Auth Code
.....

Current Refresh Code
.....

19 Jun 2019 16:31 Last Successful Auth

New Access token
.....

New Auth

Submit New Auth Code

Refresh Browser

Instructions:

- 1) [Optional] - Enter your Username and Password for HMRC on the far right. This is for your reference later. The password is stored encrypted. You can complete this process without saving these into SQLWorks.
- 2) Enter your Vat No / Vat Reference Number. This is required for MTD to work. This is a 9 digit number, which might have 'GB' before the number. The Country code does not need to be removed.
- 3) Continue through the browser window shown, filling in details as required, and confirming the program can use MTD.
- 3.1) If anything goes wrong, the 'refresh browser' button to start this part of the process again.
- 4) Copy the Auth Code returned into the box above the browser area, and click 'Submit Auth Code' - you must do this within ten minutes of the code appearing, or repeat the previous steps.
- 5) 'Success' should appear. If 'Failure' appears, try this process again.
- 6) Click Save and Exit at the top to save your ID, Password, VRN, and successful authorization date
- 7) Go to the VAT Ledger on the navigation bar, in the Nominal section, to talk to HMRC with these credentials.

6. After signing in, you may be asked to verify your account either by a call/text to the number associated with the account, or an email sent to the relevant email address. Please make sure you have these accounts/devices available and accessible. Enter the access code in the relevant field.

SQLWorks 2017 - Main Window - Accounts Prefs - DB:Lineal - VPN:No - User:Mike

Cancel Save & Close

Company Stock Quotes Orders Debtors (SL) Creditors (PL) Finance, Anl, Dept & Tax Audit Setup Sort **MTD**

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HM Revenue & Customs

Enter your access code

We just sent a 6 digit access code by text to: *****790

It may take a few minutes to arrive.

Access code
759928

Continue

[I can't get my access code](#)

[Get help with this page.](#)

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HMRC End User Account Details

HMRC User ID
EK8K5Q

HMRC User Password
.....

VAT Ref Number (VRN)
572423056

Current Auth Code
.....

Current Refresh Code
.....

19 Jun 2019 16:31 Last Successful Auth

New Access token
.....

New Auth

Submit New Auth Code

Refresh Browser

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7. Once you have confirmed your credentials status, select Grant authority.

SQLWorks 2017 - Main Window - Accounts Prefs - DB:Lineal - VPN:No - User:Mike

Company Stock Quotes Orders Debtors (SL) Creditors (PL) Finance, Anl, Dept & Tax Audit Setup Sort **MTD**

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HM Revenue & Customs

Mr Mike Matthews

Authority to interact with HMRC on your behalf
The SQLWorks 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.

Grant authority

SQLWorks will act in accordance with their [privacy policy](#) and their [terms and conditions](#).

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

HMRC End User Account Details

EK8K5Q	HMRC User ID
*****	HMRC User Password
572423056	VAT Ref Number (VRN)
	Current Auth Code
	Current Refresh Code
19 Jun 2019 16:31	Last Successful Auth

New Access token

Submit New Auth Code

Refresh Browser

Instructions:

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8. Copy and paste the Authentication code onto the right-hand side and click Submit New Auth Code which will automatically save this information.

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Authorisation granted
Copy the authorisation code below and paste it into SQLWorks when prompted.

1fa49e06; **Copy**

Once you have copied it, close this window.

HMRC End User Account Details

EK8K5Q	HMRC User ID
*****	HMRC User Password
572423056	VAT Ref Number (VRN)
	Current Auth Code
	Current Refresh Code
19 Jun 2019 17:02	Last Successful Auth

New Access token

1fa49e062f8f429cbadc **New Auth**

Submit New Auth Code

Refresh Browser

Instructions:

- 1) [Optional] - Enter your Username and Password for HMRC on the far right. This is for your reference later. The password is stored encrypted. You can complete this process without saving these into SQLWorks.
- 2) Enter your Vat No / Vat Reference Number. This is required for MTD to work. This is a 9 digit number, which might have 'GB' before the number. The Country code does not need to be removed.
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