



MANAGE SUBMISSION OF THIRD-PARTY DATA

TABLE OF CONTENTS

1	SUMMARY	3
2	BACKGROUND	3
3	WHO IS REQUIRED TO SUBMIT THIRD-PARTY DATA	3
4	REQUIREMENTS FOR A SUCCESSFUL SUBMISSION	4
5	HOW TO REPORT TO SARS	5
5.1	Enable eFiling users for Third-Party Data Submission	5
6	eFILING REGISTRATION	7
6.1	How to register for the use of eFIling	7
6.2	How to add a portfolio	8
7	ACTIVATE A REGISTERED REPRESENTATIVE	10
7.1	How to activate a Registered Representative	10
7.2	How to activate a Tax Practitioner	15
8	ACTIVATE THIRD-PARTY TAX TYPE	17
8.1	How to activate IT3 or various third-party tax types	17
8.1.1	How to activate a tax type if it does not appear as an option	19
9	ENROLLING AN ORGANIZATION	20
9.1	How to enrol an Organisation	20
10	ENROLLING TECHNICAL ADMINISTRATORS	23
10.1	eFiling Users	23
10.2	Business Administrator	24
10.3	Enrolling a Technical Administrator	24
	How to invite a Technical Administrator	24
	How a Technical Administrator accepts an invitation. How to view an invited Technical Administrator	27 30
	How to enrol a Technical Administrator	30
10.4	How to view details of a Technical Administrator	34
10.5	How to delete a Technical Administrator	35
11	REQUESTING THE SARS SECURITY CERTIFICATE	36
12	ENROLLING TECHNICAL USERS	37
12.1	How to invite Technical Users	37
12.2	How a Technical User accepts an invitation.	40
12.3	How to enrol a Technical User	41
12.4	How to view the details of a Technical User	44
12.5	How to delete a Technical User	45
13	DEFINITIONS AND ACRONYMS	46

1 SUMMARY

- a) In pursuit of improving the tax ecosystem, one of SARS strategic objectives is to work with and through stakeholders, to ensure simplicity in their tax compliance responsibilities. Considering that, this guide seeks to describe how taxpayers' and organisations/entities can manage their submission of third-party data to SARS.
- b) The guide unpacks the overall process of user adoption regarding the use of eFiling, detailing the process involved during registration and activation of third-party data tax types (e.g. IT3). This is to ultimately ensure that SARS issues the taxpayer or organisation, their tax return (e.g IT3-01) during tax seasons for submission. Additionally, the guide unpacks how registered representatives can add administrators to their organisation eFiling profile, so that tax administrators can administer the tax responsibilities of their organisation/entity. Lastly the enrolment process is unpacked of the organisation and the tax administrators for the submission of the IT3 third-party data.

2 BACKGROUND

- a) The submission of IT3 third-party data by taxpayers and third-party entities, forms part of the SARS third-party data reporting process. SARS third-party data systems receive and process information as per appropriate legislation, Government Gazette and External BRS documents aligned to international best tax practices.
- b) The following legislation portions of the Tax Administration Act, relate to the request for certificate information:
 - i) Section 26 This covers Third-Party Data Reporting
 - ii) Section 18A of the Income Tax Act, 1962, as amended This covers all approved entities.
 - iii) Section 30(10) of the Income Tax Act, 1962, as amended This covers the PBO's.
- c) Consequently, the submission of IT3 third-party data or certificates bi-annually follows a legislative requirement. Taxpayers and Third Parties are required by law to submit third-party information or data to SARS.
- d) Listed below are the Third-Party data types that should be submitted to SARS:
 - i) IT3(b) Income from Investments, Property Rights, Royalties and/or Withholding Tax on Interest
 - ii) IT3(c) Certificate of income in respect of the disposal of unit trust or other financial instruments
 - IT3(e) Income from Purchases / Sales / Shipments of Livestock / Produce / Timber / Ores / Minerals / Precious Stones or bonuses Paid / Accrued to Members of Co-Operative Companies or Societies
 - iv) IT3(s) Tax Free Investments
 - v) IT3(d) Section 18A Deductions of donations
 - vi) IT3(f) Insurance
 - vii) IT3(f) Medical
 - viii) IT3(t) Trust, and
 - ix) WHD Dividends Tax.

3 WHO IS REQUIRED TO SUBMIT THIRD-PARTY DATA

- a) The following persons are required to submit third-party data in terms of section 26 of the Tax Administration Act, 2011:
 - i) Banks regulated by the Registrar of Banks in terms of the Banks Act, 1990, or the Mutual Banks Act, 1993.
 - ii) Co-operative Banks regulated by the Co-operative Banks Development Agency in terms of the Co-operative Banks Act, 2007.
 - iii) The South African Postbank Limited (Postbank) regulated in terms of the South African Postbank Limited Act, 2010.
 - iv) Financial institutions regulated by the executive officer, deputy executive officer or board, as defined in the Financial Services Board Act, 1990, whether in terms of that Act or any other



Act (including a "financial institution" as defined in the Financial Services Board Act, 1990, other than an institution described in paragraph (a)(i) of the definition).

- v) Companies listed on the JSE, and connected persons in relation to the companies, that issue bonds, debentures, or similar financial instruments.
- vi) State-owned companies, as defined in section 1 of the Companies Act, 2008, that issue bonds, debentures, or similar financial instruments.
- vii) Organs of state, as defined in section 239 of the Constitution of the Republic of South Africa, 1996, that issue bonds or similar financial instruments.
- viii) Any person (including a co-operative as defined in section 1 of the Income Tax Act, 1962) who purchases any livestock, produce, timber, ore, mineral or precious stones from a primary producer other than on a retail basis.
- ix) Any medical scheme registered under section 24(1) of the Medical Schemes Act, 1998.
- x) Any person, who for their own account carries on the business as an estate agent as defined in the Estate Agency Affairs Act, 1976, and who pays to, or receives on behalf of, a third-party, any amount in respect of an investment, interest, or the rental of property; and
- xi) Any person, who for their own account practices as an attorney as defined in section 1 of the Attorneys Act, 1979, and who pays to or receives on behalf of a third-party any amount in respect of an investment, interest, or the rental of property.
- xii) A person liable to pay withholding tax on interest in terms of section 50F (2) of the Income Tax Act, and
- xiii) A person referred to in paragraph 2 of the Regulations issued in terms of section 12T (8) of the Income Tax Act, and who issued a financial instrument or policy in respect of a tax free investment.

Likewise, section 18A requires that Entities who received donations and issued receipts to Donors are to report those receipts to SARS. This implies that where a receipt was issued, it should be reported to SARS. The following are some of the section 18A entities required to submit information to SARS:

- i) Government (e.g., Gauteng Department of Health)
- ii) Government Institutions (e.g., Public Schools)
- iii) Public Benefit Organisations (e.g., Welfare, Health Care, Land & Housing etc.)
- iv) United Nations Agencies (e.g., UN Children's Fund, UN Development Program, etc.)
- b) Entities are to apply and get approval for Section 18A. Although certain section 18A entities will be specified in the appropriate Gazette to make data submission, a value or volume threshold may be applied for data submissions. Furthermore, where entities didn't receive any donations, a "Nil reporting declaration" is required.
- c) Lastly regarding the IT3(t) (Trust), Taxpayers or their Representatives are to supply information as per government Gazette. These include on the amounts vested to the beneficiary of a Trust.

4 REQUIREMENTS FOR A SUCCESSFUL SUBMISSION

- a) To submit the Third-Party Data file/returns successfully, taxpayers/entities must submit their data on the applicable platform and declare by validating the summary of their submitted data. eFiling registered submitting entities submit data to SARS by utilising one of the following platforms, which is dependent on the size of the data.
 - i) eFiling for IT3-01 form (max of 20 Certificates).
 - A) Note that for IT3(d) a max of 50 Certificates can be submitted.
 - ii) HTTPS for medium sized data, or
 - iii) Connect Direct for bulk data.
- b) Manual completions are done via the completion and submission of the IT3-01 form. Electronic or data file submissions are structured and uploaded as described on the file specifications detailed in the External BRS. Upon successful structuring of the file, the file should then be submitted via the HTTPS or Connect Direct platforms.
- c) To ensure that the data is received and processed by SARS, submitting entities representatives are required to validate the activation of the IT3 submission functionality on eFiling. Additionally, they are to review their submitted data on the pre-populated IT3-02 return and once reviewed and in



agreement with the summary data, they are to declare by submitting the IT3-02 return to SARS via eFiling..

5 HOW TO REPORT TO SARS

- Submitting entities and taxpayers are required to register for the use of eFiling. Once registered, eFiling should be utilised to report periodically to SARS as per government gazette and external BRS specifications.
- b) Provision of reporting is provided by SARS via the following submission channels.
 - i) Capture the IT3-01 return information via SARS eFiling
 - ii) Upload via HTTPS
 - iii) Upload via Connect Direct

Note the following when reporting IT3(d) information:

 Appropriate systems should be employed when recording one or more payment events. Additionally, the report should also be indicative of payment values that passed from the donor to the recipient. They should report occurrences where one or more payments occurred. These amounts should be reported as per the SARS IT3 Third-party data external BRS available on the SARS website.

5.1 Enable eFiling users for Third-Party Data Submission

- a) eFiling has pre-requisites for a successful third-party data submission. One of those prerequisites is that, apart from registering to make use of eFiling or submitting the data, various eFiling users should be invited and enrolled for a successful submission. This section will briefly describe the processes required when submitting third-party data. Ultimately, the last process, which is inviting the technical user, is paramount, as he or she will be responsible for the submission of the third-party data for the organisation or entity.
- b) The diagram below details the steps to activate eFiling users required for a successful third-party data submission:

Figure 1: Steps to enable eFiling Users for Third-Party Data submission.

Register for eFiling	Activate Registered Representative	Activate Tax Types	Enrol Organisation	Enrol Technical Adminstrator	Request SARS Certificate	Enrol Technical User

Steps To Enable eFiling Users	Description
Register for eFiling	Register for the use of eFiling
Activate Registered Representative	Register the Registered Representative.
	 Where the user is a Tax Practitioner, create a profile for the organisation
Activate Tax Types	Activate the necessary tax type for submission
Enrol Organisation	Enrol your organisation for the data file submission via Connect Direct
Enrol Technical Administrator	Invite and Enrol the Technical Administrator
Request SARS Security Certificate	Request and import the SARS certificate
Enrol Technical User	Invite and enrol a Technical User



- c) Figure 1 above describes the following steps.
 - i) Step 1
 - A) Ensure that you are registered for the use of eFiling.
 - On the condition that you are already a registered eFiler, do not register again. However, do note the registration process and ensure all the necessary registration requirements are met.
 - ii) Step 2
 - A) Determine your role, whether you are a tax practitioner or a registered representative.
 - I) If you are a registered representative
 - Add an organisational portfolio to your eFiling profile and register as the registered representative of your organization.
 - Do note that the registered representative is as per the Tax Administration Act such as the Public Officer, or where the organization is a trust, the trustee is the registered representative etc.
 - On the condition that you have already registered the representative do not register again
 - II) If you are a Tax Practitioner
 - Add a tax practitioner portfolio to your eFiling profile and register the applicable organisation on the tax practitioner portfolio.

iii) Step 3

- A) The registered representative/ tax practitioner once successfully activated to the profile, should activate the necessary tax type for submission on eFiling.
 - I) Do note that this process is done once.

iv) Step 4

A) Once the tax type has been successfully activated on the profile, the registered representative/ tax practitioner should then enrol the organization on the eFiling profile.

v) Step 5

- A) Once the organization has been successfully enrolled on the profile, the registered representative/tax practitioner should then invite and enrol the Tax Administrator to their eFiling profile.
 - I) Do note that the Tax Administrator can be any other individual apart from the registered representative/tax practitioner.

vi) Step 6

- A) Once the Tax Administrator has been successfully enrolled on the eFiling profile, the Tax Administrator should then request a certificate from SARS via eFiling.
- vii) Step 7
 - A) Once the SARS certificate has been issued by SARS, the Tax Administrator should import the SARS certificate on their browser.
 - B) Once the SARS certificate has been downloaded, the Tax Administrator should then invite and enrol the Technical User/s to their profile.
 - I) Do note that the Technical User/s should be another individual either than the Tax administrator or the Registered Representative/Tax Practitioner.
 - II) Multiple Technical Users can be added to the eFiling profile.

Note the following:

- All organisations should have a Registered Representative, Technical Administrator, and a Technical User for the submission of third-party data.
- All organisations should have one Registered Representative and one Technical Administrator. However, an organisation can have multiple Technical Users.
- Technical Users are responsible for the submission and the declaration of Third-Party Data to SARS.



6 eFILING REGISTRATION

- a) eFiling is a digital platform which allows users to comply in their various tax responsibilities. Taxpayers' or entities are required to register on eFiling in relation to the completion and submission of IT3 third-party data. Thus, proper registration is of importance to ensure compliance of third-party data responsibilities for an individual taxpayer or organisation.
- b) When registering on eFiling for tax administration purposes, users are given an option of selecting various profiles. The selection of eFiling profiles is based on the capacity in which users are transacting with SARS regarding their tax responsibilities. The following eFiling profiles are available:
 - i) Individual
 - A) This profile is created for individual taxpayers to fulfil their tax responsibilities in their own capacity. This profile is also applicable to individuals who are to submit their donations deductions to name a few.
 - ii) Organisation
 - A) This profile is created for organisations/entities to fulfil their tax submissions and compliance responsibilities to SARS. Organisations that make 3rd -Party data submissions include attorneys, banks, companies listed on the JSE, Co-operatives and persons purchasing from primary producers, Co-operative Banks, Estate agents, financial institutions, medical schemes, organs of state, Postbank, and State-owned companies.
 - iii) Tax practitioner
 - A) This profile is created for registered tax practitioners to make tax submission and other tax related queries on behalf of their clients. Do note that the tax practitioner profile allows them to submit third-party data on behalf of their clients.
- c) For more information on eFiling registration, kindly refer to the eFiling registration guide available on the SARS website.

6.1 How to register for the use of eFlling

- a) To register for the use of eFiling, kindly refer to the registration guides available on the SARS website: <u>www.sars.gov.za</u>
- b) Do note that once you are registered and login, the following screen will be displayed.

s .	SARS @FLNG			Home	Returns	Services	Tax Status	Contact	Log Out
Tax Reference Number	Portfolio NewLook -	Taxpayer	- i Individual						
Identification Number									
My Profile	Taxpayer Name		Contact Details ()						
	Registration Number								
SARS Correspondence									
Returns Issued									
Returns History	Tax Types Details								
Non-Core Taxes	Tax Type Description	Reference Number		Status					
Returns Search									
Payments									
Request For Reason	No Return Type Found	N/A							
Disputes									
Voluntary Disclosure	Edit Contact Details		Manage Tax Types						
Special Links								D ASK A QU	JESTION?



6.2 How to add a portfolio

- a) Once you have registered the entity successfully, proceed as follows to add a portfolio:
 - i) To create a portfolio of your organisation
 - A) Login to your eFiling profile
 - B) Click on **Profile Management**.
 - C) The Profile Management page will be displayed.
- b) Click on Add Portfolio and the following screen will be displayed:

ease add Portfolio Informa	ition
portfolioName *	
Deutfalia Trace *	
Portfolio Type *	•
Add Portfolio	

- c) Complete the **Portfolio Name**.
- d) Select from the drop-down list, the Portfolio Type
 - i) Individual
 - A) Select if portfolio is for an individual taxpayer.
 - ii) Organisation
 - A) Select if portfolio is for an organisation/entity.
 - iii) Tax practitioner
 - A) Select if portfolio is for a tax practitioner.
- e) When you have made the applicable selection, the following screen will be displayed.

Linked Portfolio(s)			Add Portfolio			
Portfolio Name	Tax User Count	Taxpayer	Please add Portfolio Information	Default		
NewLook - S KHOZA	1	1	portfolioName Cocacola	Default	:	Go to Portfolio
		_	Portfolio Type Organisation			
Unlinked Portfolio(s)		Add Portfolio			
Previous Login Name						Link

f) Click on Add Portfolio



- g) Once you have selected and completed the portfolio, the following pop-up message will be displayed.
 - i) Note the message and click on **Ok**.

						Add Portfolio
Linked Portfolio(s)						
Portfolio Name	Tax User Count	Taxonar Count	Pottfolio Tune Message	Pefault		
NewLook - S KHOZA	1		and an and a second	Default	1	Go to Portfolio
Cocacola	3	Your portfolio has been add	ed successfully.		1	Go to Portfolio
Unlinked Portfolio(s	5)					
Previous Login Name			Portfolio Name			Link

- h) Do note that your portfolio will be listed on the **Portfolio Management** Page.
 - i) Note that the **Portfolio Type** that you created will be displayed on this page.

Portfolio Manag							
							Add Portfolio
Linked Portfolio	(s)						
Portfolio Name	Tax User Count	Taxpayer Count	Portfolio Type	Default	Easy File Login		
Ind	1	1	Individual			1	Go to Portfolio
Nathi	1	3	Organisation			i	Go to Portfolio
	1	Ť.	Tax Practitioner			÷	Go to Portfolio
Estates & Trust Services	1	3	Tax Practitioner			I	Go to Portfolio
Accounting	8	410	Tax Practitioner	Default		:	Go to Portfolio

i) To access your Portfolio, click on Go to Profile



7 ACTIVATE A REGISTERED REPRESENTATIVE

7.1 How to activate a Registered Representative

- a) To activate a Registered Representative, proceed as follows:
 - i) Select **Organisation** on the main menu.
 - ii) Select SARS Registered Details
 - iii) Select Activate Registered Representative
 - iv) The Activate Registered Representative page will be displayed.

			Home	User	Organisations	Returns	Duties & Levies	Services	Tax Status	Contact	Log Out
Organisation	Portfolio	Taxpayer					0				
Bulk Registration		•		*	1						
Admin Reports	Activate Registered Representa	tivo									
Rights Groups	Activate Registered Representative										
SARS Registered Details	Confirmation of Registered User There are two ways to be activated as	s a Registered User. This 'Activate Regist	ered Representativ	e' function							
Notice of Registration	Practitioners.	Registered Representatives and is <u>not</u> in	ntended for use by 1	ax							
Registration Maintenance	A Registered Representative is a pers (e.g. Companies, Trusts, etc.), They a	Are you a Registered Representative? A Registered Representative is a person who is appointed with full rights to act on behalf of the Legal Entity (e.g. Companies. Trusts, etc.). They are often Public Officers, Accounting Officers, Trustees or									
Activate Registered Representative	Registered Representative.	Welfare Organisations, etc. A Legal Entitive acting on behalf of an Individual?	ty can only have on	•							
Maintain Registered Users		entative activations in respect of Individual	als in the following								
Maintain SARS Registered Details	Executor acting on behalf of a Parent acting on behalf of a mi	inor;									
Saved Details		g on behalf of a legally incapacitated Indivi g on behalf of an Individual in extended ab		nment or							
Maintain Registered Details History		r if you are a person who, for a fee, provide									
Merge Entities	and you are registered with a Recogn	x Act or who completes or assists with the nised Controlling Body (RCB) as well as w to activate yourself as the associated	ith SARS.	return,							
Entity Merge History	Activate Registered Representative		registered oser.								
Letters						🔛 LIVE	CHAT			S ASK A QU	IESTION?

b) Click on Activate Registered Representative

i) The **Registered Representative** page will be displayed.

		Home User Organisations Returns	Duties & Levies Services Tax Status Contact Lo	og Out
Tax Reference Number	Portfolio Taxpayer	-		
Identification Number	Registered Representatives Name ID/Passport Number	eFiling Status Date View		
My Profile	No records Found Activate New Registered Representative			
Organisation				
Bulk Registration				
Admin Reports				
Rights Groups				
SARS Registered Details				
Notice of Registration				
Registration Maintenance Activate Registered				
Representative				
Maintain Registered Users				-

c) To be activated as a Registered Representative



i) Click on Activate New Registered Representative

S SAMSON		Home	User	Organisations	Returns	Duties & Levies	Services	Tax Status	Contact	Log Out
Tax Reference Number	Portfolio	Taxpayer	•	: Tax Pract	itioner					_
Identification Number	Activate Registered Representative									
My Profile	Activate Registered Representative I, ID/Passport number of , registration number 502165536085, do hereb the taxpayer in this capacity, and that my obligations as defir not limited to the following:	being the authorised Representative Ta y confirm that I have been duly appoint red in the relevant legislation include, b	ed by							
Organisation	Maintenance of registered particulars at SARS Submission of tax returns Payment of amounts due Other related obligations									
Bulk Registration	I am fully aware of my personal accountability in this regard	and the consequences of any false dec	laration.							
Admin Reports	I agree I do not agree									
Rights Groups	(Continue)									
SARS Registered Details	-13									
Notice of Registration										
Registration Maintenance										
Activate Registered Representative										
Maintain Registered Users						CHAT			b ASK A QU	JESTION?

- d) Do note the terms and conditions of being the Registered Representative of the organisation.
 - i) Once you agree, Select I agree and click on Continue.

	😑 🌱 SARS @	FLING	н	ome User	Organisations R	eturns Duties & Lev	ies Services	Tax Status	Contact	Log Out
	Portfolio		Taxpayer		Tax Practitio	oner				
Tax Reference Number						enitz				-
Identification Number Activ	ate Registered Represent	ative								
My Profile regist	tered details of the entity. O Activate Registered Repres	ve of the enfity you may obtain nce you have confirmed your entative button. To first make	details below, you may activa changes to your eFiling User	te your Registered us details, please click <u>h</u>	er status by clicking o ere.	n				
other	users to perform certain di revoke their access, as w	aned with a Registered Repres uties on your behalf, such as to ell as revoke your own access of be assigned to other users.	o submit new registration requisition requisition requision the Maintain Registered	lests. You may assign	the role to other					
orgeniseden	nal Entity Details	-	T							
Bulk Registration	(Payer Type: gistration Number gistered Name:	Individual								
	iding Name:	à								
Rights Groups	lling User Details e:		Initia	ils: S						
ARS Registered Details	st Name: Intification Type:	SAMSON South African ID	ID/P	ame assport						
Notice of Registration Cet	ll Number:		Num	phone iber:						
Registration Maintenance	iail Address:		Num	Reference iber. uest						
Activate Registered	livation status on eFiling:	Unconfirmed Please select	Refe Num	erence iber:						
Maintain Registered Users	pacity:	Activate Registered Repres								
Maintain SARS Registered		Renvale Registered Repres	activative j			LIVE CHAT			D ASK A QU	ESTION?

- e) Your information will be displayed as part of the legal entity details.
 - i) Complete the following.
 - A) Tax reference Number.



ii) Select the appropriate capacity you are being registered as, on **Capacity**.

S SAMSON	registered details of the entity.	tative ive of the entity you may obtain a Registered user rolo Jone you have confirmed your details below, you may sentative' button. To first make changes to your eFiling	activate your Re	gistered user status by clicking on	
Tax Reference Number	other users to perform certain d	igned with a Registered Representative role on eFilin, uties on your behalf, such as to submit new registrati vell as revoke your own access via the 'Maintain Regi not be assigned to other users.	on requests. You	may assign the role to other	
	Legal Entity Details				
Identification Number	TaxPayer Type:	Individual			
	Registration Number:				
My Profile	Registered Name:				
my riolite	Trading Name:				
	eFiling User Details				
	Title:		Initials:	S	
Organisation	First Name:	SAMSON	Sumame:	KHOZA	
Bulk Registration	Identification Type:	South African ID	ID/Passport Number:		
	Cell Number:		Telephone Number:		
Admin Reports	Email Address:		Tax Reference Number:		
Rights Groups	Activation status on eFiling:	Unconfirmed	Request Reference Number:		
SARS Registered Details	Capacity:	Please select	~		
Notice of Registration		Accounting Officer Curator/Liquidator/Executor/Administrator(Estates) Main Member			
Registration Maintenance		Main Partner Main Trustee Parent/Guardian			
Activate Registered Representative		Public Officer Treasurer			
Maintain Registered Users					

f) Once selected, click on Activate Registered Representative

S match Tax Reference Number Identification Number My Profile		Activate Registered Representat		ain a Registered user	role and use eFiling to view a	nd maintain all		
Tax Reference Number ofference Rumber Identification Number Registration Rumber Identification Type: SARS Registration Notice of Registration Notice of Registration Registration Admin Reports Graphic Strouge Admin Reports Capitation Number Identification Type: SaRS Registration Notice of Registration Registration Adviation status on efiling: Identification Type: SaRS Registration Registration Adviation Registration Registration Notice of Registration Registration Notice of Registration Registration Mainterance: Adviation Registreed Users	0	registered details of the entity.	Once you have confirmed yo	our details below, you r	may activate your Registered u	iser status by clicking on		
Identification Number My Profile Tas/Payer Type: Individual Registration Number: Registration Number: Crganisation Bulk Registration Bulk Registration Admin Reports Rights Groups SARS Registration Notice of Registration Registration Maintenance Activation Maintenance Maintain Registrend Users	Tax Reference Number	other users to perform certain d users, revoke their access, as v	uties on your behalf, such a vell as revoke your own acc	is to submit new regist ess via the 'Maintain F	ration requests. You may assi	an the role to other		
My Profile Organisation Bulk Registration Bulk Registration Admin Reports Rights Groups SARS Registred Detaik Notice of Registration Registration Registration Activate Registred Representative Cell Number: Capacity: Public Officer Capacity: Public Officer								
My Prolle Registered Name: Organisation Erling User Octails Bulk Registration Erling User Octails Admin Reports Identification Type: Rights Groups Cell Number: SARS Registered Details Inconfirmed Registration Maintenance Activate Registered Representative Activate Registered Neenle Inconfirmed	Identification Number		Individual					
My Prolis Trading Name: Organisation Bulk Registration Bulk Registration Admin Reports Rights Groups SARS Registered Details Notice of Registration Activate Registered Details Activate Registered Details Activate Registered Details								
Organisation Bulk Registration Bulk Registration Admin Reports Rights Groups SARS Registred Details Notice of Registration Registration Activate Registered Reg	My Profile							
Organisation Title: Bulk Registration Bulk Registration Admin Reports Rights Groups SARS Registered Details Notice of Registration Activate Registered Registered Registered Registered Registered Registered Registered Registered Registered Number: Activate Registered Vsers		rrading Name.						
Organisation Bulk Registration Bulk Registration Admin Reports Rights Groups SARS Registred Details Notice of Registration Registration Maintenance Activate Registered Re		eFiling User Details						
Bulk Registration Admin Reports Rights Groups SARS Registred Details Registration Activate Registered Details Activate Registered Details Activate Registered Veers		Title:			Initials: S			
Bulk Registration Admin Reports Rights Groups SARS Registered Details Notice of Registration Registration Maintenance Activate Registered Users	Organisation	First Name:	SAMSON		Sumame:			
Buik Registration Admin Reports Rights Groups SARS Registration SARS Registration Registration Registration Activate Registration Activate Registration Activate Registration Activate Registration Maintain Registration		Identification Type:	South African ID					
Admin Reports Rights Groups SARS Registered Details Notice of Registration Registration Maintenance Activate Registered Users	Bulk Registration	Cell Number			Telephone			
Rights Groups SARS Registered Details Notice of Registration Registration Maintenance Activate Registered Users	Admin Reports							
Rights Groups A clivation status on eFiling: Unconfirmed Reference SARS Registered Details Capacity: Public Officer Notice of Registration Activate Registered Representative Activate Registered Name Image: Status on eFiling: Maintain Registered Users	Rumminiceports	Email Address:			Number:			
SARS Registered Details Capacity: Public Officer Notice of Registration Activate Registered Representative Registration Maintenance S Activate Registered Users S	Rights Groups	Activation status on eFiling:	Unconfirmed		Reference			
SARS Registered Details Activate Registered Representative Notice of Registration Image: Comparison of the second		Canada	Dublic Officer					
Notice of Registration Registration Maintenance Activate Registered Representative Maintain Registered Users	SARS Registered Details	Capacity:	Public Officer					
Registration Maintenance Activate Registered Representative Maintain Registered Users			Activate Registered Rep	presentative				
Registration Maintenance Activate Registered Representative Maintain Registered Users	Notice of Registration							
Activate Registered Representative Maintain Registered Users				3				
Representative Maintain Registered Users	Registration Maintenance							
Representative Maintain Registered Users	Activate Registered							
	Material Bastana Hilas							
LIVE CHAT ASK A QUESTION?	Maintain Registered Users						E CHAT	ASK A QUESTION?

g) The following screen will be displayed.



SAMSON	registered details of the entit the 'Activate Registered Re	ity. Once you have presentative' buttor	you may obtain a Registered user confirmed your details below, you r n. To first make changes to your eF	nay activate your Re iling User details, ple	gistered use ase click <u>he</u>	er status by clivere.		
5 0	other users to perform certa	ain duties on your b as well as revoke y	gistered Representative role on eF ehalf, such as to submit new regist our own access via the 'Maintain R d to other users.	ration requests. You	may assign	the role to oth	er	
Tax Reference Number	in progress and requires	that you submit	te as the Registered Represent the necessary supporting docu up below to upload and submit	mentation before	it can be f	tion process inalised.	is still	
dentification Number	Legal Entity Details				_			
aentification Number	TaxPayer Type:	Individual						
	Registration Number:							
My Profile	Registered Name:							
	Trading Name:							
	eFiling User Details							
ganisation	Title:			Initials:	S			
Sector and the sector of the s	First Name:	SAMSON		Sumame:				
lk Registration	Identification Type:	South African	ID	ID/Passport Number:				
	Cell Number:			Telephone Number:				
min Reports	Email Address:			Tax Reference				
ghts Groups	Activation status on eFilin	g: Request Und	er Verification	Request Reference Number:				
RS Registered Details	Capacity:	Public Officer	r	~				
Notice of Registration	_	Activate Reg	gistered Representative]					
Registration Maintenance	SARS requires that y	you upload and se	ubmit supporting documents.					
Activate Registered	Supporting Documents	Case Number	Status	Туре	Size	No. of Docs		
Representative	Legal Entity Authorisation	85943147	Waiting for Documentation to be Uploaded	н	0	0		
Maintain Registered Users							LIVE CHAT	ASK & QUESTION

- h) Do note that this screen requires you to upload supporting documentation to finalise the registration process.
 - i) Note that the user may also submit the required supporting documents via the SARS Online Query System (SOQS)
 - ii) On how to submit via the SOQS, please refer to the SARS website <u>www.sars.gov.za</u>.
- i) To upload supporting documents, click on the hyperlink Legal Entity Authorisation
 - i) The following screen will be displayed.

	For more information on how to use this functionality, please click <u>here.</u>	*
SAMSON	TAXPAYER DETAILS	
	Taxpayer Name:	
	Tax Reference Number:	
Tax Reference Number	Return Type: Legal Entity Maintenance	
Tax reference number		
	UPLOAD SUPPORTING DOCUMENTS	
Identification Number	Please ensure that all documents are correctly classified and successfully uploaded before submitting this group.	
	Document Name: Choose File No file chosen Upload	
My Profile	Classification: Select	
ing i fonto		
	Very important:	
	 The following file types may be uploaded: .pdf, .doc, .docx, .xlsx, .jpg and .gif. 	
rganisation	 The maximum allowable size of each file uploaded may not exceed 5Mb per document. The following files may not be uploaded as they will result in the entire group of documents being rejected: 	
	 The following hilds may not be uploaded as they will result in the entire group of documents being rejected: X Documents with the same name. 	
ulk Registration	X Password protected documents.	
	X Spread sheets with multiple sheets. X Blank or empty documents.	
dmin Reports		
	UPLOADED DOCUMENTS	
lights Groups	No documents have been uploaded	
agnis Groups		
ARS Registered Details		
ours negistered Details	DOCUMENT GROUP	
Notice of Registration	Please provide a group name for all the documents that you have uploaded above.	
Notice of Registration	Document group name Legal Entity Authorisation	
Registration Maintenance		
Registration Maintenance	Status Waiting for Documentation to be Uploaded	
Activate Registered		
Representative	Submit to SARS Manually Submitted Back	
Maintain Registered Users		
Maintain Registered Osers		ASK A QUESTION?
Maintain SARS Registered		20

j) Click on **Choose File**



	TAXPAYER DETAILS					
	Taxpayer Name:					
	Tax Reference Number	C Open				×
Tax Reference Number	Return Type:					
	UPLOAD SUPPORTIN	$\leftrightarrow \rightarrow \checkmark \uparrow \blacksquare$ > This	PC > Desktop > V	ව ,으 Search Deskto	pp	
Identification Number	Please ensure that all	Organize - New folder		8==	- 🗆 🖬	
	Document Name: Chi	OneDrive - Person	Name		Date modified	-
My Profile	Classification: Sel-	OneDrive - Persor	Project		2023/07/19 1:5	5:
		This PC	Weekly reports		2023/08/22 11	
	Very important:	3D Objects	ALM Client Launcher 3.1		2021/02/05 9:1	
	The following file The maximum all	Desktop	AmaThousand (Main Mix)		2021/10/13 5:0).
Organisation	 The following files 	Documents	Area Codes Workflow Test Cases		2023/04/12 9:0	D
	X Docume X Passwo	- Downloads	eFilingUpload		2022/04/05 12	
Bulk Registration	× Spread × Spread × Blank o	b Music			2023/06/29 2:5	
	· A Dienk O	Pictures	no Google Chrome		2022/10/28 12	£
Admin Reports	UPLOADED DOCUME	and the second se				
Rights Groups	No documents have be	Videos				
lights croups		Windows (C:)				
SARS Registered Details		BRSRevenueRisk				~
	DOCUMENT GROUP	~ .	< c		>	
Notice of Registration	Please provide a group	File nar	me:	✓ All files	~	
	Document group nan			Open	Cancel	
Registration Maintenance	Status	maning for booumonication to		open	concer	1.0

k) Select the **Classification** of the uploaded document from the drop-down list.

	For more information on he	ow to use this functionality, please click here	<u>.</u>		
SAMSON	TAXPAYER DETAILS				
<u> </u>	Taxpaver Name:				
	Tax Reference Number:				
	Return Type:	Legal Entity Maintenance			
Tax Reference Number	rectant type.	Logar Linky Martenanoe			
	UPLOAD SUPPORTING DOCU	IMENTS			
Identification Number	Please ensure that all document	ts are correctly classified and successfully uple	oaded before submitting this group.		
	Document Name: Choose File	Siling lales d adf	Upload		
			Opicad		
My Profile	Classification: Select	~ ■			
	Representative	e Appointment			
	Very important: Identity Docur	tic of Incorporation ment / Passport			
	 The following Select 	: .docx, .xis, .xisx, .jpg an	d .gif.		
Organisation	The maximum allowable size	e of each file uploaded may not exceed 5Mb per do	cument.		
igunisuton	 The following files may not a X Documents with t 	be uploaded as they will result in the entire group	of documents being rejected:		
	 X Password protected 				
ulk Registration	 X Spread sheets with 				
	 X Blank or empty do 	ocuments.			
dmin Reports	177				
	UPLOADED DOCUMENTS				
lights Groups	No documents have been upload	ded			
ARS Registered Details					
ANS Registered Details	DOCUMENT GROUP				
Notice of Registration	Please provide a group name for	r all the documents that you have uploaded at	oove.		
Notice of Registration	Document group name Legal	Entity Authorisation			
Registration Maintenance	Status Waitin	g for Documentation to be Uploaded			
Activate Registered					

I) Once selected, click on **Upload**

m) The document will be uploaded and displayed on the screen below Uploaded documents.

	Taxpayer Name:		
	Tax Reference Number:		
	Return Type: Legal E	Entity Maintenance	
<u> </u>			
	UPLOAD SUPPORTING DOCUMENTS		
	Please ensure that all documents are correctly	ly classified and successfully uploade	d before submitting this group.
Tax Reference Number	Document Name: Choose File No file chosen		Upload
	Classification: Select		
Identification Number		•	
	File successfully uploaded.		
	Very important: • The following file types may be uploaded: .p	odf day days vie view ins and all	
My Profile	 The maximum allowable size of each file up 	ploaded may not exceed 5Mb per docum	ent.
	 The following files may not be uploaded as to × X Documents with the same name. 		cuments being rejected:
	 X Password protected documents. 		
	 X Spread sheets with multiple sheet 	ets.	
Organisation		ets.	
	 X Spread sheets with multiple sheet 	ets.	
	 X Spread sheets with multiple sheet X Blank or empty documents. 		
Bulk Registration	 X Spread sheets with multiple sheet X Blank or empty documents. 	ets. File Success File Statu: Size Success File Statu:	, Date/Time Open Remov Uploaded Open Remov
	X Spread sheets with multiple sheet X Blank or empty documents. UPLOADED DOCUMENTS Document Name Classification	File Success File Statu: Size Common	Uploaded Open Remov
Bulk Registration	X Spread sheets with multiple sheet X Blank or empty documents. UPLOADED DOCUMENTS	File Size Success File Status	ed and 2023/09/06 15-35-43 View
Bulk Registration Admin Reports	X Spread sheets with multiple sheet X Blank or empty documents. UPLOADED DOCUMENTS Document Name Classification	File Success File Statu: Size 25 Convert	ed and 2023/09/06 15-35-43 View
Bulk Registration Admin Reports Rights Groups	X Spread sheets with multiple sheet X Blank or empty documents. UPLOADED DOCUMENTS Document Name Classification eFilingUpload pdf [Representative Appointment]	File Success File Statu: Size 25 Convert	ed and ed and 2023/09/06 15:35:43 View
Bulk Registration Admin Reports	• X Spread sheets with multiple sheet • X Blank or empty documents. UPLOADED DOCUMENTS Document Name Classification eFilingUpload pdf [Representative Appointment Remove DOCUMENT GROUP	File Success File Status Size Convert V 25 Stor Stor	ed and ed 2023/09/06 15:35:43 <u>View</u>
Bulk Registration Admin Reports Rights Groups SARS Registered Details	X Spread sheets with multiple sheet X Blank or empty documents. UPLOADED DOCUMENTS Document Name: Classification eFilingUpload pdf (Representative Appointment Remove	File Success File Status Size Convert V 25 Stor Stor	ed and ed 2023/09/06 15:35:43 <u>View</u>
Bulk Registration Admin Reports Rights Groups	• X Spread sheets with multiple sheet • X Blank or empty documents. UPLOADED DOCUMENTS Document Name Classification eFilingUpload pdf [Representative Appointment Remove DOCUMENT GROUP	File Success File Status Size Convert 25 Convert stor ments that you have uploaded above	ed and ed 2023/09/06 15:35:43 <u>View</u>
Bulk Registration Admin Reports Rights Groups SARS Registered Details Notice of Registration	X Spread sheets with multiple sheet X Spread sheets with multiple sheet X Blank or empty documents. UPLOADED DOCUMENTS Document Name Classification eFilingUpload pdf Representative Appointment Remove DOCUMENT GROUP Please provide a group name for all the docum Document group name [Legal Entity Authorise	File Success File Status Size Convert 25 Convert stor ments that you have uploaded above	ed and ed 2023/09/06 15:35:43 <u>View</u>
Bulk Registration Admin Reports Rights Groups SARS Registered Details	• X Spread sheets with multiple sheet • X Blank or empty documents. UPLOADED DOCUMENTS Document Neme Classification eFilingUpload pdf [Representative Appointment Remove DOCUMENT GROUP Please provide a group name for all the docum	File Success File Status Size Convert 25 Convert stor ments that you have uploaded above	ed and ed 2023/09/06 15:35:43 <u>View</u>



n) Once all the supporting documents have been uploaded, click on Submit to SARS

	Taxpayer Name:
SAMSON	Tax Reference Number: Return Type: Legal Entity Maintenance
S	Return Type: Legal Entity Maintenance
	UPLOAD SUPPORTING DOCUMENTS
	Please ensure that all documents are correctly classified and successfully uploaded before submitting this group.
Tax Reference Number	Document Name: Choose File No file chosen Upload
Identification Number	Classification: Select
	File successfully uploaded.
	Very important:
My Profile	 The following file types may be uploaded: .pdfdocdocvis, .vis, .jpg and .gif. The maximum allowable size of each file uploaded may not exceed 5Mb per document. The following files may not be uploaded is they will result in the antire group of documents being rejected:
	X Documents with the same name.
	X Password protected documents. X Spread sheets with multiple sheets.
Organisation	X Spread sheets with multiple sheets. X Blank or empty documents.
	UPLOADED DOCUMENTS
Bulk Registration	OF COADED DOCUMENTS
	Document Name Classification File Success File Status Date / Time Open Remove
Admin Reports	Size Uploaded
	eFilingUpload pdf Representative Appointment V 25 Stored 2023/09/06 15:35:43 View
Rights Groups	
	Remove
SARS Registered Details	DOCUMENT GROUP
	Please provide a group name for all the documents that you have uploaded above.
Notice of Registration	Document group name Legal Entity Authorization
Registration Maintenance	Submit to SARS
Artista Davidsond	This button submits your uploaded documents to SARS for review
Activate Registered Representative	Submit to TVRS Manually Submitted Back

o) Do note that the Status of the legal Entity will change to display "Submitted."

	ate Registered Represen	tative				
S regis	e designated Representat ered details of the entity. C ctivate Registered Repres	Once you have cont	Inmed your details below.	you may activate your Rec	istered user r	status by clickin
offer user	activated, you will be assi users to perform certain d , revoke their access, as v im merging of entities can	uties on your behal vell as revoke your	f, such as to submit new r own access via the 'Maint	egistration requests. You n	av assign the	e role to other
0	al Entity Details					
Identification Number Ta	Payer Type:	Individual				
Re	pistration Number:					
Re	pistered Name:					
My Profile	ding Name:					
	ling User Details					
Te				Initials:	ş	
Organisation Fit	d Name:	SAMSON		Sumame:		
Ide	ntification Type:	South African ID		ID/Passport Number		
Bulk Registration	Number:			Telephone		
Admin Reports En	ail Address			Tax Reference Number		
				Request		
Rights Groups Ad	ivation status on eFiling:	Request Under V	erification	Reference Number:		
SARS Registered Details	pacity:	Public Officer		~		
		Activate Regist	ared Representative			
Notice of Registration						
Registration Maintenance	ARS requires that you	upload and subm	it supporting documen	da.		No
Activate Registered 50	porting Documents Cas	e Number	Status	Type	Size	of Docs
Representative Les	al Entity Authorisation	100	Submitted	8	25	1

7.2 How to activate a Tax Practitioner

- a) Where you are a tax practitioner activate by proceeding as follows:
 - i) Select **Organisation** on the main menu.
 - ii) Select SARS Registered Details
 - iii) Select Activate Registered Representative
 - iv) The Activate Registered Representative page will be displayed.



	SARS @ FILING Home User	Organisations R	eturns Duties & Levies	Services Tax	Status Contact	Log Out
Organisation	Portfolio Taxpayer					
Bulk Registration	· · · · ·	1				
Admin Reports	Activate Registered Representative					
Rights Groups	Activate Registered Representative					
SARS Registered Details	Confirmation of Registered User There are two ways to be activated as a Registered User. This 'Activate Registered Representative' function					
Notice of Registration	is intended only for the activation of Registered Representatives and is <u>not</u> intended for use by Tax Practitioners. Are you a Registered Representative?					
Registration Maintenance	A Registered Representative is a person who is appointed with full rights to act on behalf of the Legal Entity (e.g. Companies, Trusts, ec.). They are often Public Officers, Accounting Officers, Trustees or					
Activate Registered Representative	Administrators of companies, Trusts, Welfare Organisations, etc. A Legal Entity can only have one Registered Representative. Are you a Registered Representative acting on behalf of an Individual?					
Maintain Registered Users	SARS only allows Registered Representative acting on behavior an individual? SARS only allows Registered Representative activations in respect of Individuals in the following circumstances.					
Maintain SARS Registered Details	Executor acting on behalf of a deceased or insolvent estate; Parent acting on behalf of a minor;					
Saved Details	 Appointed Administrator acting on behalf of a legally incapacitated Individual; Appointed Administrator acting on behalf of an Individual in extended absence (e.g. Imprisonment or overseas). 					
Maintain Registered Details History	Are you a Registered Tax Practitioner? You are a Registered Tax Practitioner if you are a person who, for a fee, provides advice to any other person					
Merge Entities	with respect to the application of a tax Act or who completes or assists with the completion of a tax return, and you are registered with a Recognised Controlling Body (RCB) as well as with SARS.					
Entity Merge History	Select the appropriate button below to activate yourself as the associated Registered User. Activate Registered Representative Activate Tax Practitioner					
Letters			LIVE CHAT		S ASK A Q	UESTION?

b) Click on Activate Tax Practitioner and the following screen will be displayed.

Tax Reference Number	E TSARS @ ITLING Home User Organisations Returns Duties & Levies Services Tax Status Contact Log O
Identification Number	Portfolio Taxpayer
My Profile	Tax Practitioner
	AX PRACTITIONER DECLARATION
Organisation	Tax Practitioner Declaration I ID/Passport number being an authorised Tax Practitioner. do hereby
Bulk Registration	I Diversion number I Diversion
Admin Reports	I am fully aware of my obligations and duties in this regard.
Rights Groups	® lagree
SARS Registered Details	I do not agree
Notice of Registration	Continue
Registration Maintenance	
Activate Registered Representative	
Maintain Registered Users	
Maintain SARS Registered Details	

- c) Take note of the declaration and when in agreement, click on I agree
- d) Click on **Continue**



s o	E TSARS @ FLING Home User Organisations Returns Dutles & Levies Services Tax Status Contact Log
	Portelo Taxpayer
Tax Reference Number	
Identification Number	CTIVATE TAX PRACTITIONER As a registered Tax Practitioner, you may use eFiling to submit returns on behalf of taxpayers.
My Profile	n order to do this, you first need to validate and activate your practitioner status. You can do so by confirming your details below and then clicking on the Confirm My Practitioner Status' button
	eFiling User Details
Organisation	Title: Mr Initials: S First Name: Surname: Initials: S 1D Number: Tax Practitioner Status: Initials:
Bulk Registration	Reconfirm Status
Admin Reports	
Rights Groups	
SARS Registered Details	
Notice of Registration	C₂
Registration Maintenance	
Activate Registered Representative	
Maintain Registered Users	LIVE CHAT 💮 ASK A QUESTION
Maintain SARS Registered	

e) Click on Reconfirm Status

Do note that once your eFiling profile has included the organisation, proceed as per Registered Representative of the organisation.

8 ACTIVATE THIRD-PARTY TAX TYPE

8.1 How to activate IT3 or various third-party tax types

- a) Once the above sections have been done, you can now activate your IT3 tax type. IT3 activation simply means that you are notifying SARS to issue you a return during the year of assessment for the submission of the return. SARS in turn will issue you a return during the tax seasons.
- b) This section details the process involved to activate the IT3 tax-type so that the taxpayer and organisation may submit their IT3 third-party data/certificates to SARS. Additionally, the guide also details what to take note of to ensure that the IT3 activation is processed accurately on eFiling.
- c) To activate IT3 tax type proceed as follows:
 - i) Login to your profile
- d) Proceed as follows:
 - i) Select Organisation
 - ii) Select Tax Types
 - iii) Select Manage Tax Type



My Profile	· · · · · · · · · · · · · · · · · · ·	*	Crganisation		
	Taxpayer Name				
Organisation					
Register New	Registration Number				
Change Details					
Tax Types					
Manage Tax Types	Manage Tax Types				
View Request History					
Legacy: Activation Requests	Tax Type Description	Reference Number	Status	Action	
	Provisional Tax (IRP6)		Not Active. Active with Y Koorsse Accounting & auditing.	Transfer Tax Type to me	
Legacy: Transfer Requests	Organisation Income Tax (ITR14/IT12EI/ITR12T)		Not Active. Active with Y Koorsse Accounting & auditing.	Transfer Tax Type to me	
Legacy: Pending Registration	СВС		Not Active.	Activate	
Banking Details	EMP501 - Submission		Mark Sec.	Activate	
ISV Activation	EMPSOL - Submission		Not Active.		
Summary	IT56 - Secondary Tax On Companies (STC)		Not Active.	Activate	
VAT Vendor Search	Dividends Withholding Tax (DWT)		Not Active.	Activate	
Delete Taxpayer	IT3		Not Active.	Activate	S ASK A QUESTION?

- e) Note that the **Status** of IT3 is **Not Active**
- f) Proceed by clicking on the check box **Activate** for the tax type description IT3.

My Profile					
	Manage Tax Types				
Janisation	Tax Type Description	Reference Number	Status	Action	
egister New	Provisional Tax (IRP6)		Not Active. Active with Y Koorsse Accounting	Transfer Tax Type to me	
hange Details			& auditing.		
ax Types	Organisation Income Tax (ITR14/IT128	EI/ITR12T)	Not Active. Active with Y Koorsse Accounting & auditing.	Transfer Tax Type to me	
Manage Tax Types	CBC		Not Active.	Activate	
<u> </u>	EMP501 - Submission		Not Active.	Activate	
View Request History	IT56 - Secondary Tax On Companies (STC)	Not Active.	Activate	
Legacy: Activation Requests	Dividends Withholding Tax (DWT)		Not Active.	Activate	
Legacy: Transfer Requests					
Legacy: Pending Registration	173		Not Active.	🖌 Activate	
anking Details	Medical Scheme Contribution		Not Active.	Activate	
V Activation	Insurance Payment		Not Active.	Activate	
	Foreign Tax Information (FTI)		Not Active.	Activate	
	L				
Summary /AT Vendor Search	Poreign Tax Information (PTI)		NOT ACTIVE.	Activate	

- g) Select other tax types to activate by clicking on the **Activate** check box.
- h) Once all have been selected, click on **Submit.**



My Profile		Home User Organis	ations Returns Customs Duties & Levies Servic	es Tax Status Contact Log Out
	Portfolio	Taxpayer	: Organisation	
Organisation			- · · · · · · · · · · · · · · · · · · ·	
Register New	Tax Type Request Summary			
Change Details				
Tax Types	The following action has been taken against these tax			
Manage Tax Types	Tax Type Description	Reference Number	Action	
View Request History	СВС		Activated	
Legacy: Activation Requests			Activated	
Legacy: Transfer Requests	Medical Scheme Contribution		Activated	
Legacy: Pending Registration	Insurance Payment		Activated	
Banking Details	Foreign Tax Information (FTI)		Activated	
ISV Activation				
Summary			Continue	
VAT Vendor Search				
Delete Taxpayer				ASK & QUESTION?

i) Do note that the screen will display that the IT3 has been activated.

j) Click on **Continue**

My Profile	· · · · ·		🝸 : Organisation 🛞
Organisation	Taxpayer Name		Contact Details
Register New			
Change Details	Registration Number		
Tax Types			
Manage Tax Types	Tax Types Details		
View Request History	Tax Type Description	Reference Number	Status
Legacy: Activation Requests	IT3		Successfully Activated
Legacy: Transfer Requests	Medical Scheme Contribution		Successfully Activated
Legacy: Pending Registration	Insurance Payment		Successfully Activated
Banking Details	Foreign Tax Information (FTI)		Successfully Activated
ISV Activation	CBC		Successfully Activated
Summary			
VAT Vendor Search	Edit Contact Details		Manage Tax Types Access Rights
Delete Taxpayer			Manage tax types

8.1.1 How to activate a tax type if it does not appear as an option

- a) eFiling issues tax types based on the user registration. The IT3 tax type should appear as part of the organisational profile. In incidents where an individual wants to submit their IT3(d) and IT3 tax type is not listed on Manage tax types on eFiling individual profile, they should proceed as follows:
 - i) Add an organisational portfolio into the eFiling profile. Refer to the section on how to add an organisation portfolio.
 - ii) Once added, activate the IT3 return as follows:
 - A) Select Organisation
 - B) Select Tax types.
 - C) Select Manage **Tax types**.
 - D) The Manage Tax Types page will be displayed.

SAMSON	Taxpayer Name				
Reference Number	Registration Number				
ntification Number					
ly Profile					
	Manage Tax Types				
nisation	Tax Type Description	Reference Number	Status	Action	
ister New	Provisional Tax (IRP6)		Not Active.	Activate	
nge Details	Individual Income Tax (ITR12)		Not Active. Active on your other portfolio.	 Move to this portfolio 	
Types	IT3		Not Active.	Activate	
anage Tax Types	Medical Scheme Contribution		Not Active.	Activate	
iew Request History	Insurance Payment		Not Active.	Activate	
gacy: Activation Requests	Foreign Tax Information (FTI)		Not Active.	Activate	
gacy: Transfer Requests					

- E) To activate the IT3 tax type:
 - I) Select **IT3** as the **Tax Type Description**, by clicking on the **Activate** check box.
 - II) Once selected, click on **Submit**.
 - III) Do note that the **Status** will change to display **Activated**.
- iii) Access and complete the IT3-01 return as per external guide available on the SARS website.

9 ENROLLING AN ORGANIZATION

9.1 How to enrol an Organisation

a) To enrol the organisation, the Business Administrator must be logged into eFiling at www.sarsefiling.co.za.

Tax Directives Portfolio Taxpayer Tax Directives - prior 2017
Tax Directives - prior 2017 Additional Services Tax Clearance Certificates Enrol 3rd Party Data Enrol Organisation Enrol Organisation Enrol Technical Admin Request Certificate Enrol Technical Admin Request Certificate Enrol Technical Admin Within USER you can register organisation and password. Once logged in to the service you will have four main areas of the service – depicted at the top left of the screen below the SARS eFiling Our UseR you can register additional users, assign user rights, and change user details. • Within USER you can register additional users, assign user rights, and change user details.
How do I use Services? Tax Clearance Certificates Enrol 3rd Party Data Enrol Organisation Enrol Technical Admin Request Certificate Enrol Technical User Logio using your login name and password. Once logged in to the service you will have four mainstoin details, register tax types, register banking details, and set up hierarchies, workflow and notifications
How do I request a directive? How long will take to get a Directive? How long will take to get a Directive? How will be notified when the directives have been issued? How will be notified when the directives have been issued? How will be notified when the directives have been issued? How will be notified when the directives have been issued? How will be notified when the directives have been issued? How will take to get a Directive to History Vewing History IRP3e & IT38L Duplicating a Directive Resubmitting a Declined Directive and viewing reasons why Cancelling a successful Directive How does the service operate? Login using your login name and password. Once logged in to the service you will have four main areas of the service – depicted at the top left of the screen below the SARS eFiling logo: Users, Organisation, Returns, Services Within USER you can register radditional users, assign user rights, and change user details Within USER you can register radditional users, change organisation details, register tax types, register banking details, and set up hierarchies, workflow and notifications
Enrol 3rd Party Data How will be notified when the directives have been issued? Mowing Directives to History Vewing History IRP3e & IT83L Duplicating a Directive Resubmitting a Declined Directive and viewing reasons why Cancelling a successful Directive How does the service operate? Login using your login name and password. Once logged in to the service you will have four main areas of the service – depicted at the top left of the screen below the SARS eFiling logo: Users, Organisation, Returns, Services Within USER you can register additional users, assign user rights, and change user details Within USER XITON you can register additional users, change ouser details. Within USER XITON you can register additional users, change ouser details. Within USER XITON you can register additional users, change ouser details. Within USER XITON you can register additional users, change ouser details. Within USER XITON you can register additional users, change ouser details. Within USER XITON you can register additional users. Within USER You can register you can register additional users. Within USER You can register you can register additional users. Within USER You can register you can register you can are gister you you have the you you you you you you you you you you
Enrol Organisation - IRP3e & IT88L Enrol Organisation - Diplicating a Directive Enrol Technical Admin - Directive Request Certificate Login using your login name and password. Once logged in to the service you will have four main areas of the service – depicted at the top left of the screen below the SARS eFiling logo: Users, Organisation, Returns, Services Enrol Technical User - Within USER you can register additional users, assign user rights, and change user details
Enrol Technical Admin Cancelling a successful Directive How does the service operate? Login using your login name and password. Once logged in to the service you will have four main areas of the service – depicted at the top left of the screen below the SARS eFiling log: Users, Organisation, Returns, Services Within USER you can register additional users, assign user rights, and change user details Within USER you can register organisation, change organisation details, register tax types, register banking details, and set up hierarchies, workflow and notifications
Iogo: Users, Organisation, Returns, Services Within USER you can register radditional users, assign user rights, and change user details Within USER you can register radditional users, assign user rights, and change user details Within USER you can register radditional users, assign user rights, and change user details Within USER you can register radditional users, assign user rights, and change user details
Enrol Technical User • Within ORGANISATION you can register organisations, change organisation details, register tax types, register banking details, and set up hierarchies, workflow and notifications
Submission Dashboard • Winth TAX RETORNS you can view van returns issued, complete and submit directives to SARS. You can also view van returns instudy, make payments is SARC and view payments history. • Winth DRECTIVES you can request, complete and submit directives to SARS. You can also view directive history, duplicate, archive and print a hard copy. Once a directive has been issued you can, if necessary, request that it be cancelled
Secure File Submission How do I request a directive?
My TP Configuration Click on DIRECTIVES, then within the left hand menu option click on request Click on the type of Directive i.e.: Form ABD, Form B, Form B, Form B, Form B, Forma B,

b) Once logged into eFiling and on the Organisations work page, click **Services** on the top menu bar. From the side menu options, select **Enrol 3rd Party Data**.



c) Under the **Enrol 3rd Party Data** option the following sub-menus are available:

I 3rd Party Data	Sub Menu	Accessed by Role
Enrol Organisation		
Enrol Technical Admin	Enrol Organisation	Business Administrator (eFiling Administrator)
	Enrol Technical Admin	Business Administrator (eFiling Administrator)
Request Certificate	Request Certificate	Technical Administrator
Enrol Technical User	Enrol Technical User	Technical Administrator
Submission Dashboard	Submission Dashboard	Technical Administrator/ Technical User
	Secure File Submission	Technical User
Secure File Submission		· ·

d) Select Enrol Organisation

- e) The following screen, containing the organisations details will now appear.
 - i) Select the applicable channel to enrol for.

Other Services	SARS I FILING Home User Organisations Returns Customs Duties & Levies Services Tax Status Contact	Log Out
Tax Directives	Portfolio Taxpayer	
Tax Directives - prior 2017	Enrol Organisation for 3rd Party Data Submission	
Additional Services	ORGANISATION DETAILS	
Tax Clearance Certificates	Organisation Name: The organisation reflected on the left is the organisation that Registration Number: you have selected to enrol for the submission of 3rd Party Data	
Enrol 3rd Party Data	Trading As: Physical Address:	
Enrol Organisation		
Enrol Technical Admin		
Request Certificate	Total Number of Tech Admins's: 0 Total Number of Tech users's: 0	
Enrol Technical User	Reference Number:	
Submission Dashboard	Channels enroling for: Connect Direct Legal entity enrolment requested	
Secure File Submission		
My TP Configuration		

Note: If the **Income Tax, PAYE or VAT** Reference number for the company is not pre- populated on the textbox, enter the Tax number on the textbox before you proceed to the next step.



- f) Click Enrol Organisation to retrieve the organisations details.
- g) A pop-up message will be displayed. The message confirms whether the user wants to enrol the organisation for third-party data submission. Click **Ok** to proceed.

Tax Directives	Portfolio	Taxpayer		
ax Directives - prior 2017			• i Organisation	
dditional Services	Enrol Organisation for 3rd Party	Data Submission		
fax Clearance Certificates	ORGANISATION DETAILS			
Enrol 3rd Party Data	Organisation Name: Registration Number:		You have not yet enroled an organisation for the submission of 3rd Party Data. By default your representative	
Enrol Organisation	Trading As: Physical Address:		Organisation (reflecting on the left) has been selected. To change this organisation and to enrol a different one	
Enrol Technical Admin			that will be submitting bulk data to SARS, please search for the corresponding organisation.	
Request Certificate	Total Number of Tech Admins's: Total Number of Tech users's:	0	Search for Organization	
Enrol Technical User		Message from webpage		
Submission Dashboard	Reference Number: Channels enroling for:	Connect Direct	Are you sure you want to enrol this Organisation for 3rd Party Data submission?	
Secure File Submission		Secure Web (https)		
Ay TP Configuration	Enrol Organisation		OK Cancel	

i) The screen below will be displayed

Other Services	IFILING Home	User Organisation	a Returns Customs	Duties & Levies Services	Tax Status Contact	Log Out
Tax Directives Portfolio		Taxpayer		0		
Tax Directives - prior 2017	•		÷ i Orga	nisation		
dditional Services Enrol Organisation for	3rd Party Data Submis	ision				
ax Clearance Certificates ORGANISATION DETAILS						
nrol 3rd Party Data Organisation Name: Registration Number:		5	nisation reflected on the lef selected to enrol for the su	t is the organisation that bmission of 3rd Party Data		
Enrol Organisation Trading As: Physical Address:						
Enrol Technical Admin						
Request Certificate Total Number of Tech Ar	10400300					
Enrol Technical User	vers's: 0					
Submission Dashboard Reference Number: Channels enroled for:	Secure V	Veb (https)				
Secure File Submission Status		tty enrolled				
ly TP Configuration						
omolainte					ASKA (UESTION?

h) Once an organisation has been enrolled the **Status** will be **Legal Entity Enrolled**, then the Business Administrator will be able to enrol the Technical Administrator(s).

Note the following:

• Users cannot switch from Connect Direct to Secure Web (HTTPS) or vice versa, where one of the channels has already been selected and enrolled.



- In an event where the entity enrolled a channel in error, the entity can request to delete the channel via the following SARS mailbox: bus_sys_cdsupport@sars.gov.za.
 - Do note that when switching channels, all the eFiling users will also be deleted and should be invited and enrolled.

Other Services	SARS @FENG	Home	User Organisations	Returns Custo	oms Duties & Levie	ns Services	Tax Status	Contact	Log Out
Tax Directives	Portfolio		sxpayer						
Tax Directives - prior 2017		*		- 1 0	rganisation	1999 - 19			
Additional Services	Enrol Organisation for 3rd Par	rty Data Submissi	on						
Tax Clearance Certificates	ORGANISATION DETAILS Organisation Name:		Decem	nisation reflected on					
Enrol 3rd Party Data	Registration Number: Trading As:			selected to enrol for					
Enrol Organisation	Physical Address:								
Enrol Technical Admin									
Request Certificate	Total Number of Tech Admins's:	1							
Enrol Technical User	Total Number of Tech users's:	1							
Submission Dashboard	Reference Number:								
Secure File Submission	Channels enroling for:	Connect Direct	Legal entity enro s) Legal entity enro						
My TP Configuration								DASK A QU	ESTION?

- i) The status will initially read as Legal Enrolment Requested. The status will later change to Legal Entity Enrolled. The organisation can only enrol a technical administrator if their status reads Legal Entity Enrolled.
 - i) Do note that the status will only change once the user has refreshed the screen and SARS has confirmed the enrolment.

10 ENROLLING TECHNICAL ADMINISTRATORS

10.1 eFiling Users

- a) The following three users allocated in the enrolment and submission of 3rd party data to SARS, are essential, to manage 3rd party data submission.
 - i) **Business Administrator** This user is the same as the current eFiling full administrator. The role of this user is to enrol the legal entity/organisation that will be submitting data to SARS and the Technical Administrator. The taxpayer is not required to allocate new eFiling administrators for the purposes of 3rd party data submissions if one already exists.
 - ii) **Technical Administrator** The role of this user is to request the security certificate and to enrol technical users. If the taxpayer decides to change the Technical Administrator, a new Technical Administrator must be added before the existing one can be removed. There must always be at least one Technical Administrator for each enrolled organisation.
 - iii) **Technical User** The role of this user is to submit the data files to SARS via the Direct Data Flow channel. An organisation can have multiple Technical Administrators and Technical Users in order to allocate work according to the organisation's requirements. The technical user must be a different person from the technical administrator.
- b) This section will list the various types of administrators and how to add them to your organisation profile on eFiling.

10.2 Business Administrator

a) Business Administrator can also be called the Registered Representative or the Tax Practitioner. This individual is the administrator with full administration rights on the eFiling profile. Business Administrators are responsible for inviting the Tax Administer to their profile. Additionally, the role of the business administrator is to enrol the organisation and the Technical Administrators.

Important to note: eFiling recognises the user who enrols the organisation successfully, as the Business Administrator of the organisation. This implies that he/she (the Business Administrator) cannot be enrolled as a Technical Administrator or a Technical User.

10.3 Enrolling a Technical Administrator

10.3.1 How to invite a Technical Administrator

- a) To add a Technical Administrator, the Business Administrator is to invite the user to the organisation profile. This section will highlight how the Business Administrator invites a Technical Administrator to an organisation portfolio.
- b) To invite the Technical Administrator, proceed as follows:
 - i) Login to your eFiling organisation profile
 - ii) On the menu option, select **User**.

S Mrs SUSAN			Home	User	Organisations Retu	rns Customs	Duties & Levies	Services	Tax Status	Contact	Log Out
	Portfolio	Tax U	ser		- : Organisation						
Tax Reference Number											
Identification Number											
My Profile										<u>()</u>)
User	Taxpayers										
Shared Access		Name	Regis	stration or ID	number	Tax	Reference Number	r.		Q	
Special Links											
	Name of Taxpayer	Company/ ID Number	Reference Numb	er	Last Return Fil	led	Last Accesse	d	Actions		_
					2		-		View Taxpaye	er 🛛	
							4	1	View Taxpaye	ar 🛛	
	First Previous 0	Next Last									
	Users										
	Name of User	Type of User 🕚	Invited/Approved By	D	ate of Invite	LIVE Last Log	gged In	Last R	Return Filed	ASK A QUES	TION?

- iii) On the left menu option.
 - A) Click on **User**
 - B) Click on Invite User



S Mrs SUSAN			Home User	Organisations Returns	Customs Duties & Levies Serv	ices Tax Status Contact Log Out
	Portfolio	Tax U	ser	- : Organisation		
Tax Reference Number	-				Conte	
Identification Number						
My Profile						📄 🚯 🚯 🐻
User	Taxpayers					
Invite User		Name	Registration	or ID number	Tax Reference Number	Q
Change Details						
Change Website Profile	Name of Taxpayer	Company/ ID Number	Reference Number	Last Return Filled	Last Accessed	Actions
Delete User	s					View Taxpayer
My Administrators				-	(4)	View Taxpayer
Unlock Account / Reset Password	First Previous 0	Next Last				
Shared Access						
Special Links	Users					
	Name of User	Type of User 🕚	Invited/Approved By	Date of Invite	LIVE CHAT Last Logged In	Last Return Filed

- iv) On the Invite a user page, complete the following information of the Technical Administrator
 - A) Complete their **ID Number**
 - B) Complete their **Surname**.
 - C) Complete the applicable Portfolio Name
 - D) Click on Invite

S Mrs SUSAN		3	Home	User	Organisations	Returns	Customs	Duties & Levies	Services	Tax Status	Contact	Log Out
	Portfolio		Tax User		▼ : Or	ganisation	B					
Tax Reference Number					_ • •		ente					_
Identification Number												
My Profile	Invite	a User										
		er means inviting a perso		iling profile	. A notificatio	on will be se	ent to the u	iser being invit	ed via SM	S or email, w	rith	
User	instructions	on how to accept your in	vite.									
Invite User	Identification	Туре										
Change Details	South Africa											
Change Website Profile												
Delete User	Surname											
My Administrators	Portfolio Nar	ne										
Unlock Account / Reset Password		ame filled in will be shown to th I default to their portfolio name		ution.								
Shared Access	mis hame w	r denote to their portrollo name	e upon acceptance or this invit	auon.								
Special Links	Invi	e 🧼	_									
							🔛 LIVE C	нат			D ASK A QU	JESTION?

c) The following screen will be displayed.



Mrs SUSAN Image Categore Market Subset Image Categore Image Cate		
LX Reteined Number With this profe_users can view and change information such as address, contact and bank account details. Users can also view and change information relating to their specific client type(i); Identification Number RLA - Manage Client Type With this profie_users can view and change information relating to their specific client type(s) Pion terescond Wy Profile Pion terescond Wy Profile Pion terescond User Manage Users Can create & change users and assign them to groups Manage Taxpayers Can create & change groups Can create & change groups Change Details Manage Determent Account Detete User ISV Activation My Administrators Directives Unrock Account / Reset Perform Buk and Additional Payments Password Perform Buk and Additional Payments The role allows a user without full admin rights to perform bulk and additional payments. Password Perform Buk and Additional Payments The role allows a user without full admin rights to perform bulk and additional payments. Password Perform Buk and Additional Payments The role allows a user without full admin rights to perform bulk and additional payments. Pasterd Acceos Can create a change user w		With this profile, users can only view information such as address, contact and bank account details. Users can also view information relating to their specific client type(s) eg. Importer/exporter
With this profile, users can not yview and change information relating to their specific client type(s) Image Coup for FS Iver Image Coup for FIT Filing Season Can create & change users and assign them to groups Image Coups for Can create & change stoppers and assign them to groups Invite User Image Coups for Can create & change groups and assign users and payers to groups Change Details Image Coups Change Details Image Coups Change Details Image Coup for FIT Financial Account Detete User Image Coups My Administrators Image Determent Account My Administrators Image Coups My Administrators Image Coups My Administrators Image Coups Perform Bulk and Additional Payments This role allows users to the ISV activation screen My Administrators Image Coups or roles are assigned to a user, the user with have and additional payments. Perform Bulk and Additional Payments This role allows users to roles are user, the user with the profile coups or roles are used to a user, the user with the profile coups or roles are user to role to the second coups or roles are user to the second coups or roles are usere to the second coups or roles are user tor tor tor tor	Tax Reference Number	With this profile, users can view and change information such as address, contact and bank account details. Users can also view and change information relating to their specific client
My Profile Pild Group for PTT Fling Season Invite User Image Taxpayers Can create & change taxpayers and assign them to groups Invite User Image Taxpayers Can create & change groups and assign them to groups Change Details Image Taxpayers Change Details Image Taxpayers and assign them to groups Change Website Profile Image Taxpayers and Timancial detail against an Excise Account Delete User Image Deferment Account My Administrators Image Deferment Account My Administrators Image Taxpayers access to the ISV activation screen Image Cacces Image Taxpayers access to the ISV activation screen Perform Bulk and Additional Payments This role allows a user, without full admin rights to perform bulk and additional payments. Password Image allows a user, without full admin rights to perform bulk and additional payments. Shalter Access Note: If no groups or roles	Identification Number	□ RLA - Manage Client Type With this profile, users can only view and change information relating to their specific client type(s)
User Can create & change users and assign them to groups Invite User Manage Torups Change Details Manage Torups and assign users and payers to groups Change Details Manage Excise Financial Account Change Website Profile Manage Deferment Account Delete User Si VA ctivation This role allows users to the ISV activation screen My Administrators Unlock Account / Reset Pessword Shared Access	My Profile	Pilot Group for FS Pilot Group for PIT Filing Season
Over Can create & change troppers and assign them to groups Invite User Change Oroups Change Details Change Excise Financial Account Change Website Profile Change Determent Account Delete User ISV Activation This role allows users to the ISV activation screen ISV Activation This role allows users to the ISV activation screen Delete User Unlock Account / Reset Perform Bulk and Additional Payments Perform Bulk and Additional Payments This role allows user, the user will have limited access once logged into effing. Shared Access Note: If no groups or roles are assigned to a user, the user will have limited access once logged into effing.		
Inite Oder Can create & change groups and assign users and payers to groups Change Details Image Excise Financial Account Change Website Profile Image Excise Account Delete User Image Subscreate account My Administrators Image Determent Account My Administrators Image Determent Bulk and Additional Payments Perform Bulk and Additional Payments This role allows user, the user will have limited access once logged into effiling. Shared Access Image Subscreate access on the user, will have limited access once logged into effiling.	User	
Change Website Profile Image Deferment Account Delete User Image Deferment Account Delete User Image Deferment Account My Administrators Image Deferment Account My Administrators Image Deferment Account Unlock Account / Reset Image Deferment Buk and Additional Payments The role allows users access to the ISV activation screen Shared Access Note: If no groups or roles are assigned to a user, the user will have limited access once logged into effing.	Invite User	Can create & change groups and assign users and payers to groups
Delete User ISV Activation This role allows users access to the ISV activation screen My Administrators Directives Unlock Account / Reset Perform Bulk and Additional Payments This role allows a user without full admini rights to perform bulk and additional payments. Shared Access Note: If no groups or roles are assigned to a user, the user will have limited access once logged into eFiling. Output Determine Directives Directives <p< th=""><th>Change Details</th><th></th></p<>	Change Details	
Vy Administrators Directives Unlock Account / Reset Perform Bulk and Additional Payments. This role allows a user without full admin rights to perform bulk and additional payments. Shared Access Note: If no groups or roles are assigned to a user, the user will have limited access once logged into eFiling.	Change Website Profile	Manage Deferment Account
Uhlock Account / Reset Perform Bulk and Additional Payments Password Image: State allows a user without full admin rights to perform bulk and additional payments. Shared Access Note: If no groups or roles are assigned to a user, the user will have limited access once logged into eFiling.	Delete User	
Password Perform Bulk and Additional Payments This role allows a user without full admin rights to perform bulk and additional payments. Shared Access Note: If no groups or roles are assigned to a user, the user will have limited access once logged into eFiling.	My Administrators	
Note: If no groups or roles are assigned to a user, the user will have limited access once logged into e-tiling.		Perform Bulk and Additional Payments This role allows a user without full admin rights to perform bulk and additional payments.
Special Links Continue Back	Shared Access	Note: If no groups or roles are assigned to a user, the user will have limited access once logged into eFiling.
	Special Links	Continue Back

- d) Select the following options by clicking on the applicable check box.
 - i) Manage Users
 - ii) Manage Taxpayers
 - iii) Manage Groups
- e) Once selected, click on **Continue**.
- f) The **User Summary** page will be displayed.

S Mrs SUSAN	USER SUMMARY
Tax Reference Number Identification Number My Profile	GROUPS SELECTED System Default ROLES SELECTED
User Invite User Change Details	 Can create and change users and assign them to groups. Can create and change taxpayers and assign them to groups. Can create and change groups and assign users and payers to groups.
Change Website Profile Delete User My Administrators	
Unlock Account / Reset Password Shared Access Special Links	
	LIVE CHAT 🗁 ASK A QUESTION?

- g) Do note the information of the roles selected,
- h) Once noted, click on **Continue.**
- i) Note that the status of the invited eFiling User (technical administrator) will change to be "Awaiting Confirmation".



- i) This implies that the invitation has been successfully sent through to the Technical Administrator invited and he/she should login to their eFiling profile and accept the invitation.
- j) Notify and request the invited eFiling User (Technical Administrator) to accept the invitation on their eFiling profile.

S Mrs SUSAN	Perfelio Tax User UJU (Awaiting Confirmation) Crganisation
Tax Reference Number	
Identification Number	Change Details
My Profile	Identification Type South African ID
User	ID Number
Invite User	Sumane
Change Details	
Change Website Profile	Portfolio Name The request name filled in will be shown to the requested user.
Delete User	This name will default to their portfolio name upon acceptance of this invitation.
My Administrators	
Unlock Account / Reset Password	Send Reminder Cancel Invitation Update User Rights
Shared Access	
Special Links	
	LIVE CHAT 🐑 ASK A QUESTION?

10.3.2 How a Technical Administrator accepts an invitation.

- a) Request the Technical Administrator to login on his/her eFiling profile.
- b) Once the Technical Administrator has logged in, the following screen will be displayed.

					Home	Returns	Services	Tax Status	Contact	Log Out
Tax Reference Number	Portfolio UJU2023 - UJU	+ UJU		• Individual						_
Identification Number	6									
My Profile	[
Profile and Preference Setup	Tax Compliance Status		Refresh 🗯	Refund Status:					Refresh	C
Special Links				Note: Please note tha latest account balance you), please allow up the refund not be pair dashboard status for a	e. Should your acco to 72 hours for the d within the stated	refund to be p period, you ca	redit (amount baid to you. Sh n refer to the	due to louid		
	Account Balance:			Not Available						S
	Personal Income Tax (ITR12)									
	Tax Period	Return Status					Due Date			
	Notification				🛄 LIVE CH	IAT			D ASK A QU	JESTION?

- c) Click on My Profile
- d) Click on **Portfolio Management**
- e) The Portfolio Management page will be displayed.



Portfolio Manage	ment				
					Add Portfolio
Linked Portfolio(s)				
Portfolio Name	Tax User Count	Taxpayer Count	Portfolio Type	Default	
UJU2023 - UJU	1	1	Individual	Default	Go to Portfolio
User Invitation(s)	Your invitation will expire a	utomatically if not accepte	d within 5 working days.		
User Invitation(s) Portfolio Name	Your invitation will expire at	utomatically if not accepte	d within 5 working days. Request Date		Accept
	Your invitation will expire at	utomatically if not accepte		500.687	Accept Accept
Portfolio Name		utomatically if not accepte	Request Date	500.687	

- f) Click on Accept
- g) The OTP page will be displayed.
 - i) Complete the OTP

South African Revenue Service	CTP has been sent to the following email NCTP has been sent to the following email Piesse enter the last 6 digits of your OTP. Resend OTP Submit	FILING
	崖 LIVE CHAT	ASK A QUESTION?

h) Once verification is successful, the Technical Administrator will be linked to the organisation portfolio.



Portfolio Manag	ement						
						Ac	Id Portfolio
Linked Portfolio	(s)						
Portfolio Name	Tax User Count	Taxpayer Count	Portfolio Type	Default	Easy File Login		
UJU2023 - UJU	1	1	Messag	le		i	Go to Portfolio
CCN MOTORS BK	9	2 Portfolio	CCN MOTORS BK linked.		UJU2023_1	:	Go to Portfolio
		ок					
User Invitation(s	 Your invitation will e 	xpire automatically if	not accepted within 5 wo	orking days.			
Portfolio Name			R	equest Date			Accept
CCN MOTORS BK				2023-07-20T10:26:00.687			Accept

- i) Do note the pop-up message indicating that the Technical Administrator has been linked to the organisation successfully.
 - i) Once noted, click on **Ok.**

			Home User	Organisations Returns (Customs Duties & Levies Serv	rices Tax Status Contact Log Out
	Portfolio CCN MOTORS BK	Taxpa 	yer I MOTORS BK	 Organisation 		
Tax Reference Number					Contr	
Identification Number						
My Profile						
SARS Correspondence	Taxpayers					
Returns Issued		Name	Registration	or ID number	Tax Reference Number	Q
Returns History						
Returns Search	Name of Taxpayer	Company/ ID Number	Reference Number	Last Return Filled	Last Accessed	Actions
Dividends Tax	CCN MOTORS BK			201	5. 5 .	View Taxpayer
Levies and Duties	Mrs S.J. DIXON			-	2251	View Taxpayer
Third Party Data Certificate Search	First Previous 0	Next Last				
Third Party Data						
Automatic Exchange Of Information (AEOI)	Users					
Non-Core Taxes	Name of User	Type of User 0	Invited/Approved By	Date of Invite	LIVE CHAT Last Logged In	Last Return Filed

- j) Note that the linked organisation profile will be displayed on the eFiling Landing page of the Technical Administrator eFiling profile.
 - i) To view the profile linked, click on **View Taxpayer.**



10.3.3 How to view an invited Technical Administrator

- a) Business Administrators are to login to eFiling.
- b) As part of the menu option
 - i) Select **Rights Groups**
 - ii) Select Manage Groups
- c) The invited Technical Administers will be displayed on the far right of the screen.

Portfolio CCN MOTORS BK	CCN MOTORS BK • Grganisation	
nce Number	·	
on Number Unallocated Users Switch to Grid View Back to Group List	Group: System Default	
	Pop & UJU & HEN	
	V NAIDOO S Smit VS GERB	
ered Details	S.J. DIXO	4
ts		
rs		
roups		
on Setup		
istration		
	LIVE CHAT	ASK A QUESTION

10.3.4 How to enrol a Technical Administrator

a) eFiling administrator enrolments allows the invited/ added tax administrators to function on the organisational profile. This section will demonstrate how to enrol a technical administrator and technical user for tax administration purposes of the organisational profile.





Effective Date: 19 March 2024

b) To enrol a Technical Administrator, select **Enrol Technical Admin** from the side menu options, on your Organisations work page under the **Enrol 3rd Party Data** menu.

My Pronie				Home User	Organisations	Returns	Customs	Duties & Levies	Services	Tax Status	Contact	Log Out
er Services	Portfolio CCN MOTORS BK	*	Taxpayer CCN MOTOF	ts BK	* : Organ	nisation						
Directives										_		
Directives - prior 2017												
litional Services	Enroll Technical Administrat	tor for 3rd Party Data Sub	mission									
Clearance Certificates	Organisation Name:	CCN MOTORS BK										
rol 3rd Party Data	Registration Number: Tax Reference:											
inrol Organisation	NAME	ID NUMBER/PASSPORT		ENROLLMENT DATE	STATUS							
nrol Technical Admin	VALARIE	ID NUMBERIASSFOR	ROMDER	2022/06/10	Link Enrolled	Open						
tequest Certificate	Find Technical Administrator											
Enrol Technical User												
Submission Dashboard												
Secure File Submission												
y TP Configuration												
mplaints												
e Help?							-				_	
acial Links								CHAT			D ASK A QU	ESTION?

c) Click Find Technical Administrator to search and select a Technical Administrator.

CORONISATION DEDUCT			
Reference Number Registration Number	Search for Tax User Sumame: Email Address Login Name First Name]	
tification Number	The wild character (*) may be used.	<u>.</u>	
Profile VALARIE SHIRLEY 6			
Find Technical Administ			
Services			
irectives			
virectives - prior 2017			
ional Services			
learance Certificates			
3rd Party Data			
ol Organisation			
ol Technical Admin		close	
guest Certificate			
rol Technical User	<u> </u>		ASK A QUESTION?

d) Complete the information required and click on **Search**. The user can complete one of the fields and click on search. If no values are entered in the above fields, click on **Search** and all the registered eFiling users for the relevant organisation will be displayed.



S Mrs SUSAN	Enroll Technical Administrator for 3rd						
	ORGANISATION DETAILS						
Tax Reference Number	Organisation Name Registration Numbe	Sumame:		Search for Tax User Email Address			
Identification Number	Tax Réference:	Login Name	IJU2023 ^(*) may be used.	First Name	Search		
My Profile	NAME VALARIE SHIRLEY C	Record found. Surname	First Name	Page 1 of Login Name UJU2023_1	<< Previous Next >> Email Address		
	Find Technical Adminis	000		Back to Top			
ther Services							
ax Directives							
dditional Services							
ax Clearance Certificates							
nrol 3rd Party Data							
Enrol Organisation							
Enrol Technical Admin						close	
Request Certificate							
Enrol Technical User					LIVE CHAT		ASK A QUESTION?

e) The screen with the user's details will be displayed. Select the user to be enrolled as the Technical Administrator.

S Mrs SUSAN	Enroll Technical Ad				
Tax Reference Number	Organisation Name: Registration Numbe Tax Reference:	Enrol Technical Administrator for 3rd Party Data Submission] .
Identification Number		USER DETAILS			
My Profile	VALARIE SHIRLEY G	Name: UJU ID Number: Email Address:			
Other Services	sad rouncer sometis	Cell Phone: Telephone Number:			
ax Directives		Enrol Technical Administrator			
ax Directives - prior 2017					
Additional Services					
ax Clearance Certificates					
inrol 3rd Party Data					
Enrol Organisation					
Enrol Technical Admin			 	close)
Request Certificate					
Enrol Technical User			LIVE CHAT		ASK A QUESTION?

f) The screen with the details of the selected user will be displayed as confirmation. Select **Enrol Technical Administrator**, to submit the request.

S Mrs SUSAN	Enroll Technical Administrate	or for 3rd Party Data Submission					-
Tax Reference Number	Organisation Name: Registration Number: Tax Reference:	CCN MOTORS BK					
My Profile	NAME VALARIE UJU UJU	D NUMBER/PASSPORT NUMBER	ENROLLMENT DATE 2022/06/10 2023/07/20	STATUS Link Enrolled Enrolment requested	Open Open		
Other Services	Find Technical Administrator						- 1
Tax Directives						1	
Tax Directives - prior 2017	5						
Additional Services							
Tax Clearance Certificates							
Enrol 3rd Party Data							
Enrol Organisation							
Enrol Technical Admin							
Request Certificate							
Enrol Technical User						🔛 LIVE CHAT	ASK A QUESTION?
****							-

- g) By selecting the Enrol Technical Administrator button you will be redirected to the grid page.
- h) In the **Status** column, the status **Enrolment Requested** indicates that SARS is still processing the enrolment. The status **Link Enrolled** will be displayed once the enrolment of the user as the Technical Administrator has been confirmed.
- i) To replace one Technical Administrator with another Technical Administrator, the first enrolled Technical Administrator must have a status **Link Enrolled**. The Business Administrator must then enrol a new Technical Administrator. Click **Find Technical Administrator** and once a new Technical Administrator has been enrolled, the other Technical Administrator can be deleted.

Mrs SUSAN						oms Duties & Levies		Log
leference Number	CCN MOTORS BK	-	Taxpayer CCN MOTORS BK	* i Org	anisation			_
ification Number	Enroll Technical Administra	tor for 3rd Party Data Subm	ission					
Profile	ORGANISATION DETAILS	CCN MOTORS BK						
Services	Organisation Name: Registration Number: Tax Reference:	CON MOTORS BK						
ectives	NAME	D NUMBER/PASSPORT N						
ectives - prior 2017	VALARIE : UJU UJU		2022/06/10 2023/07/20		Open Open			
mal Services	Find Technical Administrator							
arance Certificates								
rd Party Data			a					
Organisation			u .					
Technical Admin								
est Certificate								
Technical User								

10.4 How to view details of a Technical Administrator



a) To view all the Technical Administrators, click Enrol Technical Admin.

Other Services	SARS @FILING	Home User	Organisations Returns	Customs Duties & Levies	Services	Tax Status	Contact Log	g Out
Tax Directives	Portfolio	Taxpayer		6				
Tax Directives - prior 2017			Ť	: Organisation	ů.			
Additional Services								
Tax Clearance Certificates	Enroll Technical Administrator for	3rd Party Data Submiss	ion					
Enrol 3rd Party Data	ORGANISATION DETAILS Organisation Name:							
Enrol Organisation	Registration Number: Tax Reference:							
Enrol Technical Admin								
Request Certificate	NAME ID NUMBER/F	PASSPORT NUMBER	ENROLLMENT DATE	STATUS				
Enrol Technical User	Find Technical Administrator			Enrolment requested	Open			
Submission Dashboard								
Secure File Submission								
My TP Configuration								
							ASK A QUESTION	1817

b) All the Technical Administrators with the associated status with regard to their enrolment and activation will be displayed. Click **Open** next to a Technical Administrator to view the details of that particular Technical Administrator.

Other Services	📄 🌱 SAi	S OFILING	Home	User	Organisations	Returns	Customs	Duties & Levies	Services	Tax Status	Contact	Log Out
Tax Directives	Portfolio			Taxpayer				6				
Tax Directives - prior 2017			-				: Orgar	nisation	й.			
Additional Services	Enroll Technical											
Tax Clearance Certificates	(CONTRACTOR OF CONTRACTOR OF C											
Enrol 3rd Party Data	Originitization New Registration Nutri	Enrol Technie	al Administr	ator for 3m								
Enrol Organisation	Tax Reference:	Party Data Su			-							
Enrol Technical Admin		USER DETAILS										
Request Certificate	Good Persona	ID Number: Email Addres			EST@TEST.CO.							
Enrol Technical User	Find Zechnics	Cell Phone: Telephone No			eargreateor							
Submission Dashboard			Technical Adm	inistrator								
Secure File Submission	}											
My TP Configuration												
												_



c) Details of the Technical Administrator will now open.

10.5	How to	delete	а	Technical Administrator
------	--------	--------	---	-------------------------

Other Services		Home User	Organisations Returns	Customs Duties & L	evies Services	Tax Status	Contact Log Ou
Tax Directives	Portfolio	Taxpaye	ĸ				
Tax Directives - prior 2017				: Organisation			
Additional Services							
Tax Clearance Certificates	Enroll Technical Administrator f	or 3rd Party Data Submi	ssion				
Enrol 3rd Party Data	ORGANISATION DETAILS Organisation Name:						
Enrol Organisation	Registration Number: Tax Reference:						
Enrol Technical Admin	-						
Request Certificate	NAME ID NUMBER	VPASSPORT NUMBER	ENROLLMENT DATE	STATUS Link Enrolled	<u>Qpen</u>		
Enrol Technical User	Find Technical Administrator						
Submission Dashboard							
Secure File Submission							
My TP Configuration	1						

a) To delete a Technical Administrator, click **Open** next to the Technical Administrator that should be removed.

Other Services	≡ ▼SARS @ FILING Home User Organisations Returns Customs Duties & Levies Services Tax Stat	itus Contact Log Out
Tax Directives	Portfolio Taxpayer	
Tax Directives - prior 2017	· · · · · · · · · · · · · · · · · · ·	
Additional Services	Enroll Technical Administrator for 3rd Party Data Submission	
Tax Clearance Certificates	CONTRACTORS	
Enrol 3rd Party Data	Organization Nor Registration Nor Enrol Technical Administrator for 3rd	
Enrol Organisation	Tax References Party Data Submission	
Enrol Technical Admin	USER DETAILS	
Request Certificate	Good Panors ID Number: Email Address:	
Enrol Technical User	Find Technice Cell Phone: Telephone Number:	
Submission Dashboard	Delete Technical Administrator	
Secure File Submission		
My TP Configuration		ASK A QUESTION?

b) Click **Delete Technical Administrator** to remove the Technical Administrator.



Other Services	SAi	S PILING Home	User Organisations	Returns Customs	Duties & Levies	Services	Tax Status	Contact	Log Out
Tax Directives	Portfolio	1	Taxpayer		G				
Tax Directives - prior 2017				÷ i Orga	nisation	<u>a</u>			
Additional Services	Enroll Technical /								
Tax Clearance Certificates	ORGANIATIONS								
Enrol 3rd Party Data	Creation Nucleon Nucle	Enrol Technical Administrator	for 3rd						
Enrol Organisation	Tax Reference:	Party Data Submission	Message	to delete a Technical	-				
Enrol Technical Admin	-	USER DETAILS Name:	Administrator result in a cha	Please note that a dele nge in the Technical U	ser Source				
Request Certificate	Jamos Maja'	ID Number: Email Address:	To obtain the	ed in the file submissio new source ID:					
Enrol Technical User	Find Technica	Cell Phone: Telephone Number:	• Cotoy	log in as the Technical our profile : Enrol 3rd Party Data Me					
Submission Dashboard		Delete Technical Administra		cal User⇔ Select Tech Open ⇒ Copy the enti or					
Secure File Submission				new Source ID in you	rfile				
My TP Configuration				Confirm	Cansel				

c) You will be prompted to confirm that the user must be deleted. If you select **confirm**, the Technical Administrator will be deleted. To cancel the deletion, select **Cancel**.



d) If you attempt to delete the only enrolled Technical Administrator without having deleted all the Technical Users first, this message will be displayed.

11 REQUESTING THE SARS SECURITY CERTIFICATE

- a) It is important to note that before a successful submission, third-party data entities should request a security certificate from SARS. The security certificate is only valid for 12 months from the date it was issued.
- b) The Technical Administrator requests SARS security on behalf of the entity. Additionally, the Technical Administrator should have been enrolled successfully to request the security certificate from SARS. This security certificate is required for the submission of data via the Connect: Direct channel.
- c) To request the security certificate from SARS, kindly refer to the following guides.
 - i) GEN-ENR-01-G02 Guide for the Submission of third-party data using the HTTPS Channel -External Guide
 - ii) GEN-ENR-01-G01 Guide for the submission of third-party data using the connect direct channel External Guide



12 ENROLLING TECHNICAL USERS

12.1 How to invite Technical Users

- a) Technical users are invited by the Technical Administrator. The Technical Administrator should first request the SARS certificate for the submission of data. The Technical Administrator should then invite the technical user and ultimately add and enrol the technical user.
- b) Once the Technical Administrator has been successfully added to the organisation profile by the Business Administrator, he/she can invite many technical users to the eFiling organisation portfolio. This section will describe to the Technical Administrators how he/she can invite and add Technical User(s) to the organisational profile.
- c) To invite the Technical User to the Business admin profile, proceed as follows:
- d) The Technical Administrator is to login to eFiling.
- e) Once on the Landing page, select the following
 - i) **User** displayed on the main menu.
 - ii) **User** displayed on the left menu.
 - iii) **Invite User** displayed on the left menu.

S Mrs SUSAN	E 🗲 SARS 👁 FR. INS Home User Organisations Returns Customs Duties & Levies Services Tax Status Contact Log Out
	Portfolio Tax User CCN MOTORS BK - DIXON S.J : Organisation
Tax Reference Number	
Identification Number	Invite a User
My Profile	invite a Oser
	Inviting a user means inviting a person that already has an eFiling profile. A notification will be sent to the user being invited via SMS or email, with instructions on how to accept your invite.
User	
Invite User	Identification Type
Change Details	Please Select Type
Change Website Profile	Surname
Delete User	Portfolio Name
My Administrators	The request name filled in will be shown to the requested user. This name will default to their portfolio name upon acceptance of this invitation.
Unlock Account / Reset Password	CCN MOTORS BK
Shared Access	Invite
Special Links	
	🔛 LIVE CHAT 🗁 ASK A QUESTION?

- f) The **Invite a user** page will be displayed.
- g) Complete the Technical User details.



S Mrs SUSAN	■ ▼SARS @ FILLING Home User Organisations Returns Customs Duties & Levies Services Tax Status Contact Log Out
Tax Reference Number	Pertfolio Tax User CCN MOTORS BK - DIXON S.J : Organisation
Identification Number	
My Profile	Invite a User
User	Inviting a user means inviting a person that already has an eFiling profile. A notification will be sent to the user being invited via SMS or email, with instructions on how to accept your invite.
Invite User	Identification Type
Change Details	South African ID
Change Website Profile Delete User	Surname
My Administrators	POP
Unlock Account / Reset Password	Portfolio Name The request name filled in will be shown to the requested user. This name will default to their portfolio name upon acceptance of this invitation.
Shared Access Special Links	
special clinks	Invite
	. Dive CHAT Dive CHAT

h) Once completed, click on Invite

S Mrs SUSAN	RLA – View Customs Product information With this profile, users can only view information such as address, contact and bank account details. Users can also view information relating to their specific client type(s) eg. importerie/profer
	RLA - View Client Type With this profile, users can only view information relating to their specific client type(s) eg. importer/exporter
Tax Reference Number	RLA – Manage Customs Product information With this profile, users can view and change information such as address, contact and bank account details. Users can also view and change information relating to their specific client type(s) eg. importer/exporter
Identification Number	RLA - Manage Client Type With this profile, users can only view and change information relating to their specific client type(s)
My Profile	Pilot Group for FS Pilot Group for PIT Filing Season
	☑ Manage Users Can create & change users and assign them to groups
User	Analoge Taxpayers Can create & change taxpayers and assign them to groups
Invite User	I Manage Groups Can create & change groups and assign users and payers to groups
Change Details	Manage Excise Financial Account This role allows users to maintain all financial detail against an Excise Account
Change Website Profile	Manage Deferment Account
Delete User	ISV Activation This role allows users access to the ISV activation screen
My Administrators	□ Directives
Unlock Account / Reset Password	Perform Bulk and Additional Payments This role allows a user without full admin rights to perform bulk and additional payments.
Shared Access	Note: If no groups or roles are assigned to a user, the user will have limited exess once logged into eFiling.
Special Links	Continue Back
	LIVE CHAT Course of the second

- i) Click on **Continue**.
- j) Do note that the **Status** of the invited eFiling user will be **Awaiting confirmation**.
- k) Notify the Technical User to **Accept** the invitation sent through on the eFiling profile.
- I) Note the roles the technical User can do, on Roles Selected
- m) To continue, click on **Continue**.



S Mrs SUSAN	E 🗲 SARS 🐵 FILING Home User Organisations Returns Customs Duties & Levies Services Tax Status Contact	.og Out
Tax Reference Number	Perfelio CCN MOTORS BK - POP (Awaiting Confirmation) - Organisation	
My Profile	USER SUMMARY	
User	GROUPS SELECTED	
Invite User	System Default	
Change Details	ROLES SELECTED	
Change Website Profile	 Can create and change users and assign them to groups. Can create and change taxpayers and assign them to groups. 	
Delete User	Can create and change groups and assign users and payers to groups.	
My Administrators	Continue	
Unlock Account / Reset Password		
Shared Access		
Special Links		
	🔛 LIVE CHAT 💮 ASK A QUEST	10N?

- n) Do note that the **Status** of the invited eFiling user will be **Awaiting confirmation**.
- o) Do note that the Technical Administrator can either.
 - i) Send a reminder.
 - ii) Cancel an invitation.
 - iii) Update user rights

S Mrs SUSAN		Home User	Organisations Returns	Customs Duties & Levies	Services Tax Status	Contact Log Out
Tax Reference Number	Portfolio CCN MOTORS BK ~	Tax User POP (Awaiting Confirmation)	✓ I Organisation			
Identification Number						
My Profile	Change Details					
	Identification Type					
User	South African ID 🗸					
Invite User	ID Number					
Change Details	Surname					
Change Website Profile	POP					
Delete User	Portfolio Name The request name filled in will be shown to t	he requested user.				
My Administrators	This name will default to their portfolio name	e upon acceptance of this invitation.				
Unlock Account / Reset Password	CCN MOTORS BK Send Reminder Cancel Invitation	Update User Rights				
Shared Access		Update User Fognis				
Special Links						
				🛄 LIVE CHAT		ASK A QUESTION?

12.2 How a Technical User accepts an invitation.

a) The invited technical User should login to their eFiling profile.

Р РОР О					Home	Returns	Services	Tax Status	Contact	Log Out
Tax Reference Number	Portfolio POP2023 - POP	Taxpayer POP		i Individual						
Identification Number										
My Profile										
Profile and Preference Setup	Tax Compliance Status		Refresh D	Refund Status:					Refresh	c
Special Links				Note: Please note that you latest account balance. Sf you), please allow up to 7 the refund not be paid wi dashboard status for a re	hould your account 72 hours for the r 1 thin the stated p	unt reflect a c refund to be p period, you ca	redit (amount paid to you. Sh in refer to the	due to louid		
	Account Balance:			Not Available						O
	Personal Income Tax (ITR12)									
	Tax Period	Return Status					Due Date			
	Notification				🛄 LIVE CHA	AT			bo ask a qu	ESTION?

- b) On the Landing page click on **My Portfolio**
- c) Select **Portfolio Management** on the left menu option.
- d) The **Portfolio Management** page will be displayed.

Portfolio Manage	ment					
						Add Portfolio
Linked Portfolio(s)					
Portfolio Name	Tax User Count	Taxpayer Count	Portfolio Type	Default		
POP2023 - POP	1	1	Individual	Default	:	Go to Portfolio
	Your invitation will expire at	utomatically if not accepte			,	
Portfolio Name	Your invitation will expire as	utomatically if not accepte	Request Date		`	Accept
	Your invitation will expire at	utomatically if not accepte		k15.06		Accept Accept
Portfolio Name		utomatically if not accepte	Request Date	k15.06	,	

- e) To accept the invitation, click on **Accept.**
- f) The OTP page will be displayed requesting you to complete the OTP.
 - i) Complete the OTP PIN



V SARS	One Time Pin OTP has been sent to the following cellphone number OTP has been sent to the following cellphone number OTP has been sent to the following cellphone number OTP has been sent to the following cellphone number One Time Pin is required Please enter the last 6 digits of your OTP.	€ FILING
South African Revenue Service	Resend OTP Submit	E ASK A QUESTION?

The following screen will be displayed indicating that the Portfolio has been successfully linked. g)

Portfolio Manag	jement							
								Add Portfolio
Linked Portfolio	o(s)							
Portfolio Name	Tax User Count	Taxpayer	Count	Portfolio Type	Default	Easy File Login		
POP2023 - POP	1	1		Messag	le	-	i	Go to Portfolio
CCN MOTORS BK	10	2	Portfolio	CCN MOTORS BK linked.		POP2023_1	:	Go to Portfolio
			ок					
User Invitation(s) Your invitation will e	xpire automa	atically if	not accepted within 5 wo	orking days.			
Portfolio Name				R	equest Date			Accept
CCN MOTORS BK					2023-07-20T10:34:15.06			Accept

12.3 How to enrol a Technical User

- Technical Administrators are to enrol the Technical User. The Technical Administrator can enrol the a) Technical User as follows:
 - Login as a Technical Administrator profile (the technical administrator to login on eFiling) i)
- b) Navigate on eFiling as follows:
 - i)
 - Click on **Services** on the main menu. Select **Enrol 3rd party Data** on the left menu. ii)



Tax Reference Number	SARS @FILING	Home	User Organisations Returns	Customs Duties & Levier	Services Tax Status	Contact Log Out
Identification Number	Portfolio CCN MOTORS BK	Taxpayer CCN MOTORS BK	· I Organisation	FREP		
My Profile			: Organisation			
Other Services	Enroll Technical User for 3rd Party Data Submissi	on				
Tax Directives	ORGANISATION DETAILS Organisation Name: CCN MOTORS BK					
Tax Directives - prior 2017	Organisation Name: CCN MOTORS BK Registration Number: Tax Reference:					
Additional Services	Tax Reference.					
Tax Clearance Certificates	ID NUMBER/PASSPORT NUMBER	ENROLLMENT DATE 2022/06/10	STATUS Delete requested Open			
Enrol 3rd Party Data	Sonja HEN	2023/05/25 2023/07/11	Delete requested Open Enrolment requested Open			
Enrol Organisation	Find Technical User					
Enrol Technical Admin						
Request Certificate						
Enrol Technical User						
Submission Dashboard						
Secure File Submission						
My TP Configuration				LIVE CHAT		ASK A QUESTION?

iii) Click on Find Technical User

Tax Reference Number				
Identification Number	Enroll Technical User for 3rd Party I			
	ORGANISATION DETAILS			
My Profile	Organisation Name Registration Numbe Tax Reference:	Sumame: Login Name	earch for Tax User Email Address First Name	
ther Services	NAME	The wild character (*) may be used.	Search	
ax Directives	THISEN NAIDOO Sonja Smil HEN HEN			
ax Directives - prior 2017	Fintl Technical User			
dditional Services				
fax Clearance Certificates				
nrol 3rd Party Data				
Enrol Organisation				
Enrol Technical Admin				
Request Certificate				
Enrol Technical User				close
Submission Dashboard				
Secure File Submission				
My TP Configuration			LIVE CHAT	ASK A QUESTION?

- Complete the following details of the Technical User A) Complete the **Surname** iv)

 - Complete the **Email Address** Complete the **First Name** Complete the **Login Name** Вý
 - C)
 - D)
- v) Once completed, click on Search



My Profile							
her Services	Enroll Technical User for 3rd Party D						-
x Directives	ORGANISATION DETAILS						
Directives - prior 2017	Organisation Name. Registration Numbe	Sumame:		Search for Tax Us Email Add			
	Tax Reference:	Login Name P		First Nam	e		
ditional Services		The wild character (") may be used.		Search		
Clearance Certificates	THISEN NAIDOO	Record found.	First Name	Page 1 of Login Name	<< Previous Next >> Email Address		
ol 3rd Party Data	Sorga Smit	POP	POP	POP2023_1	Email Add/ESS		
or sharpany bata	HEN HEN			Back to Top			
Enrol Organisation	Find Technical User						
Enrol Technical Admin							
Request Certificate							
Enrol Technical User							
Submission Dashboard							
Secure File Submission							
y TP Configuration							
omplaints						close	
e Help?					🛄 LIVE CHAT		~
erial Links					LIVE CHAI		ASK A QUESTION?

- vi) Tap on the applicable Technical User.
- c) The Technical Administrator is to create and complete the **Secure Web Username** for the Technical User
 - i) Complete the Secure Web Username

Other Services	Organisation Name			
ax Directives	Registration Number	Enrol Technical User for 3rd Party Data Submission		
x Directives - prior 2017		USER DETAILS		
Iditional Services	NAME THISEN NAIDOO	Name: POP ID Number:		
ax Clearance Certificates	Sonja Smt HEN KEN	Email Address:		
nrol 3rd Party Data	Find Technical User	Cell Phone: Telephone		
Enrol Organisation		Number: 112F23D2-CAA7-4A80-ADCB-		
Enrol Technical Admin		Identifier: C4A91C8109ABE82716EA-76A5- 45DE-AD55-748D4DD2E2FD		
Request Certificate		Please provide us with the Secure Web username used when submitting a file to SARS:		
Enrol Technical User		Secure Web Username: POP2023		
Submission Dashboard		Enrol Technical User		
Secure File Submission				
Ay TP Configuration				close
Complaints	2			
Live Help?			LIVE CHAT	ASK A QUESTION?

- ii) Once completed, click on Enrol Technical User
- iii) The Enrol Technical User for 3rd party data submission page will be displayed.



My Profile	SARS @FIL	NG	Home	User Organisations	s Returns	Customs Duties & Levies	Services Tax Sta	itus Contact	Log Out
Other Services	Portfolio CCN MOTORS BK	•	Taxpayer CCN MOTORS BK	* : Orga	anisation				
Tax Directives						Con Con			-
Tax Directives - prior 2017	Enroll Technical User for 3r	d Party Pata Submission							
Additional Services	ORGANISATION DETAILS	a Party Data Submission							
Tax Clearance Certificates	Organisation Name: Registration Number:	CCN MOTORS BK							
Enrol 3rd Party Data	Tax Reference:								
Enrol Organisation	NAME ID NU	IBER/PASSPORT NUMBER	ENROLLMENT DATE	STATUS					
Enrol Technical Admin	THISEN Sonja		2022/06/10 2023/05/25	Delete requested Delete requested	Open Open				
Request Certificate	HEN POP		2023/07/11 2023/07/20	Enrolment requested Enrolment requested	Open Open				
Enrol Technical User	Find Technical User								
Submission Dashboard									
Secure File Submission									
My TP Configuration									
Complaints									
Live Help?						-			
Special Links						🔛 LIVE CHAT		ASK A QI	JESTION?

- iv) Note that the Status is **Enrolment requested**.
 - A) This implies that the Technical User has been issued and will receive their username and password via his/her eFiling security details.
- d) The Technical Administrator is to advise the Technical User to login to HTTPS.
 - ii) Where the login details has not been sent through to the Technical User, kindly notify SARS via the following email address: bus_sys_cdsupport@sars.gov.za

12.4 How to view the details of a Technical User



a) To view all the Technical Users, click Enrol Technical User



iervices	Portfolio		Taxpayer				
ectives		-		* : Org	ganisation		
ectives - prior 2017							
nal Services	Enroll Technical User for 3rd Party D	ata Submission					
arance Certificates	ORGANISATION DETAILS Organisation Name:		•				
rd Party Data	Registration Number: Tax Reference:						
Organisation			J				
Technical Admin	NAME ID NUMBER PASSPO	RTNUMBER	ENROLLMENT DATE 2014/04/23	STATUS Role Enrolled	Qeen		
est Certificate	Find Technical User						
Technical User							
ission Dashboard	l						
e File Submission							
Configuration						ASKA	QUESTION?

- b) All the Technical Users will be displayed on the screen. To view the details of a specific Technical User:
 - i) Click **Open** next to the relevant user.
 - ii) Details of the Technical User will be displayed.
 - iii) The Source Identifier field must be used in all files submitted by that Technical User on the Direct Data Flow Channel using the Secure File gateway technology

ISER DETAILS		
Name:		
ID Number:		
Email Address:		
Cell Phone:		
Telephone Number:		
Source Identifier:		
ConnectDirect Username:		

12.5 How to delete a Technical User

a) Click **Open** next to the Technical User that is to be removed on the **Enrol Technical User for 3**rd **Party Data Submission** page.

USER DETAILS	
Nome:	
ID Number:	
Email Address:	
Cell Phone:	
Telephone Number:	
Source Identifier:	
Delete Technical User	
	ctose



- b) Click Delete Technical User to remove the Technical User.
 - i) You will be prompted to confirm if the Technical User should be deleted.
 - ii) Select **OK**, to delete the Technical User.
 - iii) To cancel, select **Cancel**

?	Are you sure you want to delete this Technical User?
	OK Cancel

c) On the **Status** column, the status **Delete Requested** indicates that the request to delete the user as a Technical User has been submitted to SARS. The status **User Deleted** will be displayed once the enrolment of the Technical User has been cancelled on the SARS systems.

ax Directives - prior 2017	Portfolio.	-	Taxpayer	👻 🚦 Organisa		
Additional Services				i Organisa	tion the second	
ax Clearance Certificates						
nrol 3rd Party Data	Enroll Technical User for 3rd P	arty Data Submiss	sion			
Enrol Organisation	ORGANISATION DETAILS Organisation Name:					
Enrol Technical Admin	Registration Number: Tax Reference:					
Request Certificate						
	NAME ID NUMBER/PA	SSPORT NUMBER	ENROLLMENT DATE	STATUS		
Enrol Technical User			2015/04/13	Delete requested	Open	
			2015/04/13	Role Enrolled Role Enrolled	Open	
Submission Dashboard			2015/04/13 2015/04/09	Role Enrolled	Open Open	
Sauth			2015/04/13	Role Enrolled	Open	
Secure File Submission						
	Find Technical User					
My TP Configuration						
My TP Configuration						

d) The deleted Technical Users will not be displayed on the screen.

13 DEFINITIONS AND ACRONYMS

Link for centralised definitions, acronyms, and abbreviations: <u>Glossary A-M | South African Revenue</u> <u>Service (sars.gov.za)</u>

DISCLAIMER

The information contained in this guide is intended as guidance only and is not considered to be a legal reference, nor is it a binding ruling. The information does not take the place of legislation and readers who are in doubt regarding any aspect of the information displayed in the guide should refer to the relevant legislation or seek a formal opinion from a suitably qualified individual.

For more information about the contents of this publication you may:

- Visit the SARS website at www.sars.gov.za.
- Make a booking to visit the nearest SARS branch.
- Contact your own tax advisor / tax practitioner.
- If calling from within South Africa, contact the SARS Contact Centre on 0800 00 SARS (7277); or
- If calling from outside South Africa, contact the SARS Contact Centre on +27 11 602 2093 (only between 8am and 4pm South African time).