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# VAT User Guide

Making Tax Digital VAT returns from your own spreadsheet  
— mapped, checked and filed to HMRC, with liabilities and  
payments tracked alongside.

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# VAT: getting started

Switch on the VAT service, enter your VAT registration number and find your way around.

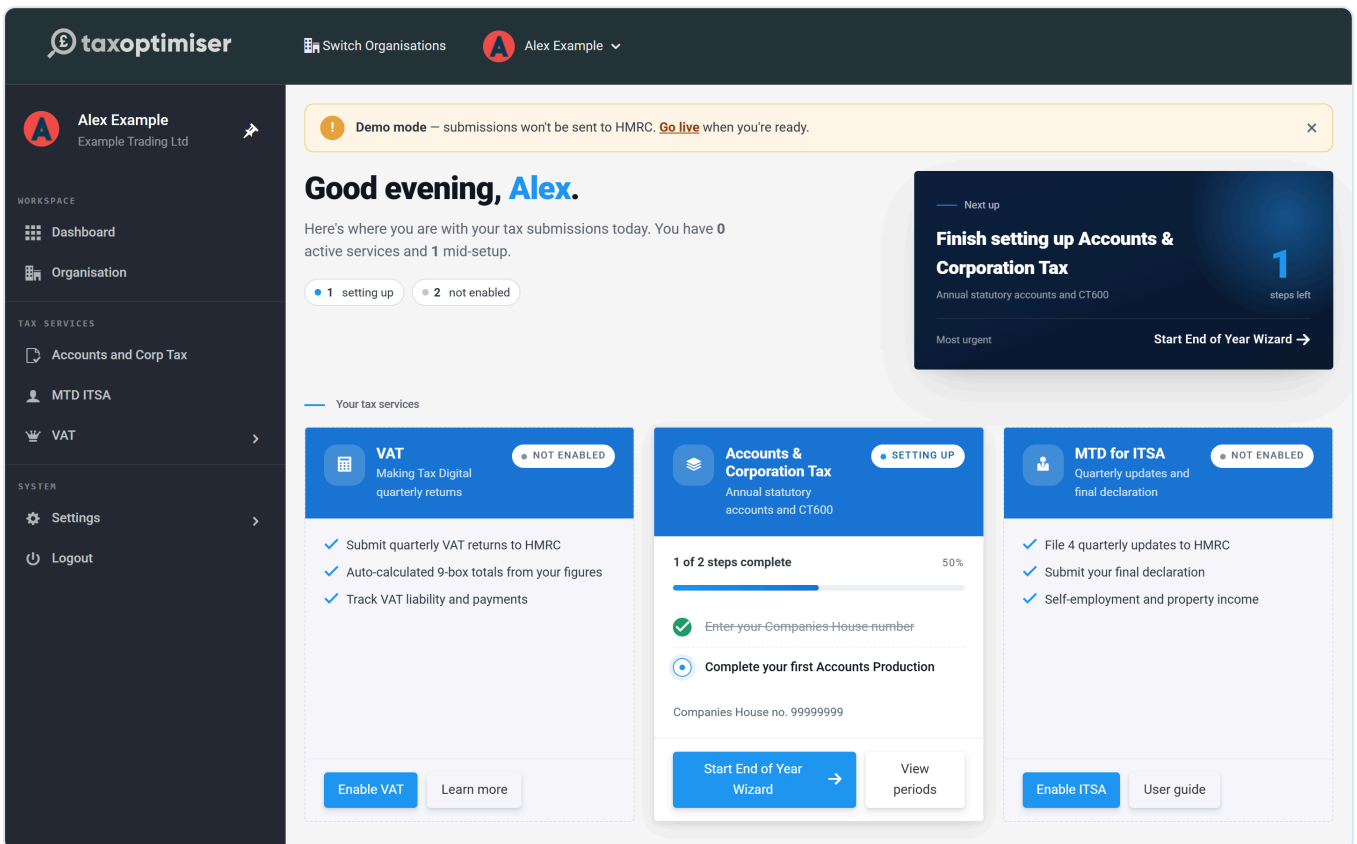
## IN SHORT

- Tax Optimiser is MTD bridging software: keep your own spreadsheet
- Enable VAT from the dashboard card - first year is free
- Your VAT registration number goes under Organisation, Tax & VAT
- VAT Returns and VAT Settings live in the sidebar VAT menu

Tax Optimiser files your VAT returns to HMRC under **Making Tax Digital** as bridging software: you keep working in your own spreadsheet, and Tax Optimiser reads the nine VAT-return boxes from it and submits them digitally. Nothing about how you do your bookkeeping has to change. This guide walks the whole journey – this first article switches the service on and records your VAT registration number.

## Enable the VAT service

From your dashboard, find the **VAT** card under *Your tax services* and click **Enable VAT**. The service is free for your first year of submissions, so there is nothing to pay to get started.



## Enter your VAT registration number

Go to **Organisation** → **Tax & VAT** and fill in your 9-digit **VAT Registration No** – it's on your VAT registration certificate and your HMRC business tax account. The same tab lets you record your **VAT Scheme**; most

businesses are on *Standard*. Press **Save**.

The screenshot shows the Tax Optimiser web application interface. At the top, the logo 'taxoptimiser' is on the left, and 'Switch Organisations' and 'Alex Example' are on the right. A dark sidebar on the left contains navigation options: 'Alex Example Example Trading Ltd', 'WORKSPACE' (Dashboard, Organisation), 'TAX SERVICES' (Accounts and Corp Tax, MTD ITSA, VAT), and 'SYSTEM' (Settings, Logout). The main content area is titled 'Example Trading Ltd' and has four tabs: 'Company Details', 'Tax & VAT' (selected), 'Companies House', and 'System & Defaults'. The 'Tax & VAT' tab contains the following fields: 'VAT Registration No' (111111162), 'VAT Scheme' (Standard), 'VAT Entity' (Single Organisation), 'Corporation Tax UTR' (111111111), 'Corporation Tax Sender Id' (Government Gateway Id), 'Corporation Tax Password' (Government Gateway Password), and 'Tax Office'. A blue 'Save' button is at the bottom right of the form. At the bottom of the page, there is a footer: '© 2026. Powered by Tax Optimiser v1.0.0.10 | [Leave a review](#)'.

## Find your way around

Everything VAT lives in the sidebar under **VAT**: **VAT Returns** is the list of your HMRC periods and where you submit from, and **VAT Settings** is where you tell Tax Optimiser how to read your spreadsheet. Once you are connected, the dashboard card tracks your setup steps and then shows your next return and its filing deadline.



## VAT

Making Tax Digital  
quarterly returns

● SETTING UP

2 of 3 steps complete

67%



~~Enter your VAT Registration Number~~



Connect to Test HMRC



~~Send a test VAT return~~

Continue setup →

Need a hand?

Next: tell Tax Optimiser where your figures live – see *Map your spreadsheet in VAT Settings*.

# Map your spreadsheet in VAT Settings

Tell Tax Optimiser which sheet and cells of your spreadsheet hold the nine VAT-return boxes.

## IN SHORT

- One-off setup: map your spreadsheet once, then just upload each quarter
- Software templates pre-fill the mapping for common systems
- Sheet name = the Excel tab name, matched exactly
- Box 7 includes no-VAT purchases, so it will not tie to 5x Box 4
- An example front sheet matching the defaults is downloadable

Your VAT figures stay in your own spreadsheet – each quarter you'll upload it and Tax Optimiser reads the nine HMRC boxes straight out of it. **VAT Settings** is where you tell it which sheet and cells to read. You set this up once; after that the quarterly routine is just upload, check, send.

## The VAT Settings screen

Open **VAT** → **VAT Settings** from the sidebar. The **VAT Submission Software** name at the top is what appears on HMRC submissions as the originating software – leave it as Tax Optimiser unless told otherwise.

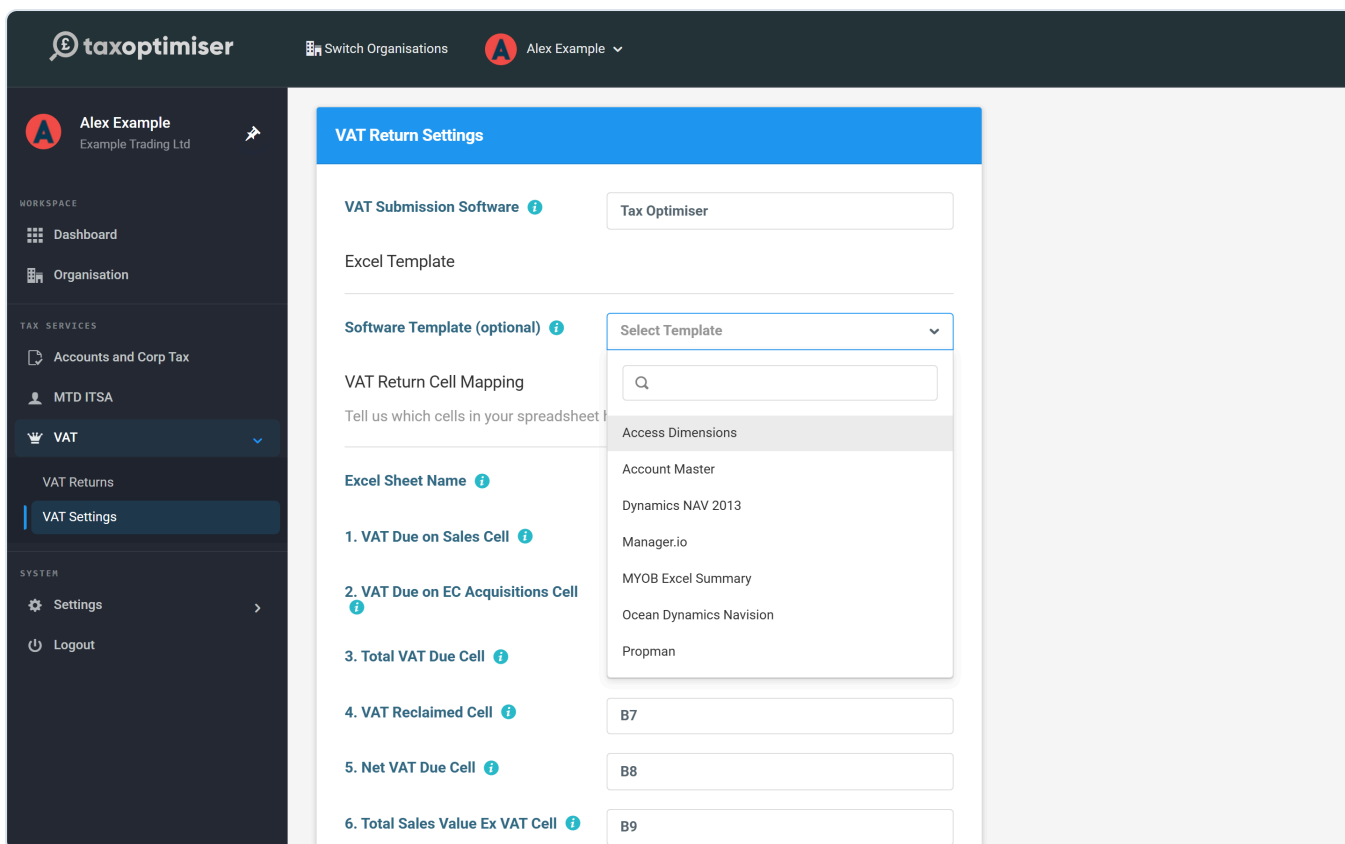
The screenshot shows the 'VAT Return Settings' screen in the Tax Optimiser application. The sidebar on the left includes sections for 'WORKSPACE' (Dashboard, Organisation), 'TAX SERVICES' (Accounts and Corp Tax, MTD ITSA, VAT, VAT Returns, VAT Settings), and 'SYSTEM' (Settings, Logout). The main content area is titled 'VAT Return Settings' and contains the following configuration options:

- VAT Submission Software**: Tax Optimiser
- Excel Template**: (Empty field)
- Software Template (optional)**: Select Template (dropdown menu)
- VAT Return Cell Mapping**: Tell us which cells in your spreadsheet hold each of the nine HMRC VAT-return boxes.
- Excel Sheet Name**: VAT
- 1. VAT Due on Sales Cell**: B4
- 2. VAT Due on EC Acquisitions Cell**: B5
- 3. Total VAT Due Cell**: B6
- 4. VAT Reclaimed Cell**: B7
- 5. Net VAT Due Cell**: B8
- 6. Total Sales Value Ex VAT Cell**: B9

## Start from a software template...

If your spreadsheet is an export from a known system, pick it from **Software Template** – Sage, Access Dimensions, Dynamics NAV, MYOB, Manager.io and others are listed. Choosing one pre-fills the sheet name

and all nine cell references; you can still adjust any of them afterwards.



## ...or map the cells yourself

For your own spreadsheet, fill the mapping in directly:

1. **Excel Sheet Name** – the name of the worksheet *tab* along the bottom of Excel (for example **VAT**). It must match exactly, including spaces – it is not the filename.
2. **The nine cell references** – one per HMRC box, such as **B4**. Each must point at the cell holding that box's final figure.

Press **Save**. If you'd rather adopt a ready-made layout, the upload screen (next article) offers a **Download Example Front Sheet Excel File** that matches the default mapping out of the box.

## VAT Return Settings

VAT Submission Software 

Tax Optimiser

Excel Template

Software Template (optional) 

Select Template

### VAT Return Cell Mapping

Tell us which cells in your spreadsheet hold each of the nine HMRC VAT-return boxes.

Excel Sheet Name 

VAT

1. VAT Due on Sales Cell 

B4

2. VAT Due on EC Acquisitions Cell 

B5

3. Total VAT Due Cell 

B6

4. VAT Reclaimed Cell 

B7

5. Net VAT Due Cell 

B8

6. Total Sales Value Ex VAT Cell 

B9

7. Total Purchase Value Ex VAT Cell 

B10

8. Total EC Goods Supplied Value Ex VAT Cell 

B11

9. Total EC Acquisitions Value Ex VAT Cell 

B12

Save

## The nine boxes at a glance

- **Box 1** – VAT due on sales and other outputs.
- **Box 2** – VAT due on acquisitions of goods from EU member states (Northern Ireland traders only; 0 for most businesses).
- **Box 3** – total VAT due: Box 1 + Box 2.
- **Box 4** – VAT reclaimed on purchases and other inputs.
- **Box 5** – net VAT due to (or reclaimable from) HMRC: Box 3 – Box 4.
- **Box 6** – total value of sales excluding VAT, in whole pounds.
- **Box 7** – total value of purchases excluding VAT, in whole pounds – including purchases that carried no VAT, so don't expect it to be exactly five times Box 4.
- **Box 8** – total value of goods supplied to EU member states (NI traders only).
- **Box 9** – total value of goods acquired from EU member states (NI traders only).

# Connect to HMRC and find your VAT periods

Practise the HMRC connection in demo mode, then grant authority for real and let your periods flow in.

## IN SHORT

- Periods (obligations) are pulled from HMRC, never typed in
- Demo mode is a safe rehearsal: nothing is sent to HMRC
- Granting authority lasts 18 months; reconnect when it expires
- You must be signed up to MTD with HMRC before going live
- Accountants can connect once with an HMRC agent account

Under Making Tax Digital your VAT periods come *from* HMRC: once connected, Tax Optimiser pulls down your open and completed periods (HMRC calls them obligations) and you submit against them – you never type in period dates yourself. Every new organisation starts in **demo mode**, a safe sandbox where you can practise the whole journey without anything being sent to HMRC.

## Connect in demo mode

Open **VAT** → **VAT Returns**. While you are in demo mode a banner reminds you that nothing will be sent to HMRC. Click **Connect to HMRC DEMO MODE**.

The screenshot shows the Tax Optimiser interface. At the top, there's a dark header with the 'taxoptimiser' logo, a 'Switch Organisations' button, and a user profile for 'Alex Example'. A dark sidebar on the left contains navigation options: 'Alex Example Example Trading Ltd', 'WORKSPACE' (Dashboard, Organisation), 'TAX SERVICES' (Accounts and Corp Tax, MTD ITSA, VAT, VAT Returns, VAT Settings), and 'SYSTEM' (Settings, Logout). The main content area has a blue header for 'VAT Returns' with an 'Actions' dropdown. Below this is a large blue button that says 'Connect to HMRC DEMO MODE' with a crown icon. At the top of the main content area, there's an orange banner with the text: 'You are currently in demo mode and nothing will be sent to HMRC. If you have signed up to MTD and would like to send live returns click [here](#).' At the bottom of the page, there's a footer: '© 2026. Powered by Tax Optimiser v1.0.0.10 | [Leave a review](#)'.

## Walk the dummy gateway

You'll step through a simulation of HMRC's real connection flow, so there are no surprises when you do it for real: press **Continue**, then **Sign in** on the dummy login (no credentials needed in demo mode), and finally **Grant authority** – this is the permission that lets Tax Optimiser fetch your periods and submit returns on your behalf.

# THIS IS A DUMMY VERSION OF THE HMRC PLATFORM

## FOR SIMULATING TESTING WITH Tax Optimiser

Because this is a dummy site nothing will be sent to the HMRC site. **Tax Optimiser** needs permission to interact with HMRC on your behalf. To grant this authority, you'll need to:

1. Sign in to your Government Gateway account.
2. Grant authority to interact with HMRC on your behalf.

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

► Details

[Continue](#)

# Authority to interact with HMRC on your behalf

The **Tax Optimiser** software application is requesting to do the following:

- View your VAT information
- Change your VAT information

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

[Grant authority](#) [Do not grant authority](#)

## Your VAT periods arrive

Back on **VAT Returns** you'll see demo periods in the returns table – one already *Fulfilled* (a completed return can't be submitted against) and one *Open* awaiting data. The **Liabilities** and **Payments** tabs sit alongside. In

demo mode you can reset this sample data at any time with **Actions** → **Reset Test Data**.

The screenshot shows the Tax Optimiser interface. At the top, there is a dark header with the logo, a 'Switch Organisations' button, and a user profile for 'Alex Example'. A notification banner at the top right states: 'You are currently in demo mode and nothing will be sent to HMRC. If you have signed up to MTD and would like to send live returns click [here](#).' Below this is the 'VAT Returns' section, which includes a table with columns for Period, Start Date, End Date, Due Date, Net Due, Return Status, Submission Status, and Actions. The table contains two rows of data. The left sidebar contains navigation options for Workspace (Dashboard, Organisation) and Tax Services (Accounts and Corp Tax, MTD ITSA, VAT, VAT Returns, VAT Settings). The footer of the interface shows the copyright notice: '© 2026. Powered by Tax Optimiser v1.0.0.10 | [Leave a review](#)'.

Period	Start Date	End Date	Due Date	Net Due	Return Status	Submission Status	Actions
2026-05	01/03/2026	31/05/2026	07/07/2026	12250.00	Open	Confirmation of data required	<a href="#">✎</a>
2026-02	01/12/2025	28/02/2026	07/04/2026	8000.00	Fulfilled	Completed	<a href="#">✎</a>

## Going live

When you're ready, click the link in the demo banner. The **Live mode** confirmation reminds you of the one prerequisite: your business must already be signed up to Making Tax Digital with HMRC (you'll have had a confirmation email from them).

**Live mode**

Please ensure you have received an email from HMRC confirming that you are on MTD. Once you set to live mode all your returns all your submission will be your actual live returns.

If you need to sign up to MTD please click [here](#)

Close Set to live mode

Period	Start Date	End Date	Due Date	Net Due	Return Status	Submission Status	Actions
2026-05	01/03/2026	31/05/2026	07/07/2026	12250.00	Fulfilled	Completed	<a href="#">✎</a>
2026-02	01/12/2025	28/02/2026	07/04/2026	8000.00	Fulfilled	Completed	<a href="#">✎</a>

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In live mode you connect exactly as you practised, but on HMRC's real gateway with your real **Government Gateway** credentials – HMRC may also ask you to complete two-factor authentication. Accountants can instead connect using their **HMRC agent account** and submit for every client from one authority. The authority lasts 18 months; when it expires, reconnect from **Actions** → **Reconnect to HMRC**. Your live periods then replace the demo ones, and if a period you're expecting hasn't appeared yet, use **Refresh data**.

# Upload your VAT figures

Drag your spreadsheet onto the open period and check the nine boxes it fills.

## IN SHORT

- The uploaded file is the source of truth; boxes are read-only
- Fix figures in your spreadsheet and re-upload, not in the app
- Example front-sheet files are downloadable from the upload panel
- Sheet-not-found errors mean the tab name does not match settings
- Nil returns: reset values to zero, then submit as normal

Each quarter you upload your spreadsheet to the open period and Tax Optimiser fills the nine boxes from the cells you mapped in *VAT Settings*. The boxes themselves are read-only – the uploaded file is always the source of truth, which is exactly what Making Tax Digital's digital-links rules want.

## Open the return

On **VAT Returns**, click the period link of the *Open* return. You'll see the return's dates and status, the nine boxes at zero, and an **Upload File** panel on the right. If you don't have your own layout yet, the two example files under the panel give you a ready-made front sheet that matches the default cell mapping.

The screenshot shows the Tax Optimiser interface for a VAT Return. The top navigation bar includes the logo, a 'Switch Organisations' button, and the user profile 'Alex Example'. The left sidebar lists 'WORKSPACE' (Dashboard, Organisation) and 'TAX SERVICES' (Accounts and Corp Tax, MTD ITSA, VAT, VAT Returns, VAT Settings) and 'SYSTEM' (Settings, Logout). The main content area is titled 'VAT Return' and has an 'Actions' dropdown. It is divided into 'Details' and 'Audit Log' tabs. The 'Details' tab shows the following information:

- Start Date:** 01/03/2026
- End Date:** 31/05/2026
- Due Date:** 07/07/2026
- HMRC Status:** Open
- Submission Status:** Confirmation of data required
- Values:**
  - 1. VAT due on sales: 0.00
  - 2. VAT due in the period on acquisitions of goods made in Northern Ireland from EU Member States: 0.00
  - 3. Total VAT due: 0.00

On the right, the 'Upload File' panel features a dashed box with a file icon and a plus sign, with the text 'Drop file to upload or CLICK'. Below this are two buttons: 'Download Example Front Sheet Excel File' and 'Download Example Excel File with Transaction'. At the bottom of the panel, it says 'To change the what sheet and cells to extract the data from, please change the settings here' with a link.

## Upload your spreadsheet

Drag your file onto the upload area (or click it to browse). Excel files (.xlsx, .xls, .xlsm) and .csv are accepted. Processing takes a few seconds – the page updates itself when it's done, and the file is kept on the return so you can **Download** it later or **Delete** it and upload a corrected version.

## Check the nine boxes

The boxes now show what was read from your spreadsheet – check them against your records before sending. In our example company the quarter's standard-rated sales were £85,400, so Box 1 shows £17,080.00 of output VAT, Box 4 reclaims £4,830.00 of input VAT, and Box 5 lands on £17,080 – £4,830 = **£12,250.00** net VAT due. If a box is wrong, fix the cell in your spreadsheet and upload again – don't adjust the mapping to a different cell unless the layout itself changed.

The screenshot displays the Tax Optimiser VAT Return interface. At the top, there's a notification: "You are currently in demo mode and nothing will be sent to HMRC. If you have signed up to MTD and would like to send live returns click [Here](#)." The main content area is titled "VAT Return" and includes an "Actions" dropdown. The form is divided into "Details" and "Audit Log" tabs. The "Details" tab shows the following fields:

- Start Date: 01/03/2026
- End Date: 31/05/2026
- Due Date: 07/07/2026
- HMRC Status: Open
- Submission Status: Confirmation of data required

The "Values" section contains three rows:

- 1. VAT due on sales: 17080.00
- 2. VAT due in the period on acquisitions of goods made in Northern Ireland from EU Member States: 0.00
- 3. Total VAT due: 17080.00

On the right side, the "Upload File" section features a dashed box with a plus icon and the text "Drop file to upload or CLICK". Below this are two buttons: "Download Example Front Sheet Excel File" and "Download Example Excel File with Transaction". A note below the buttons says: "To change the what sheet and cells to extract the data from, please change the settings [here](#)". At the bottom, the "Uploaded File" section shows a file named "1106260728demo-vat-return.xlsx".

## Common upload problems

- **"The Sheet ... cannot be found"** – the sheet name in VAT Settings doesn't match a tab in your file. Remember it's the tab name, not the filename.
- **A box reads zero unexpectedly** – the mapped cell is empty or holds text rather than a number in your file.
- **Nil return?** – you still have to submit. Use **Actions** → **Reset all values to zero** on the return instead of uploading a file of zeros.

# Send your return and keep the receipt

Accept the declaration, get HMRC's acceptance back and keep the receipt as proof of filing.

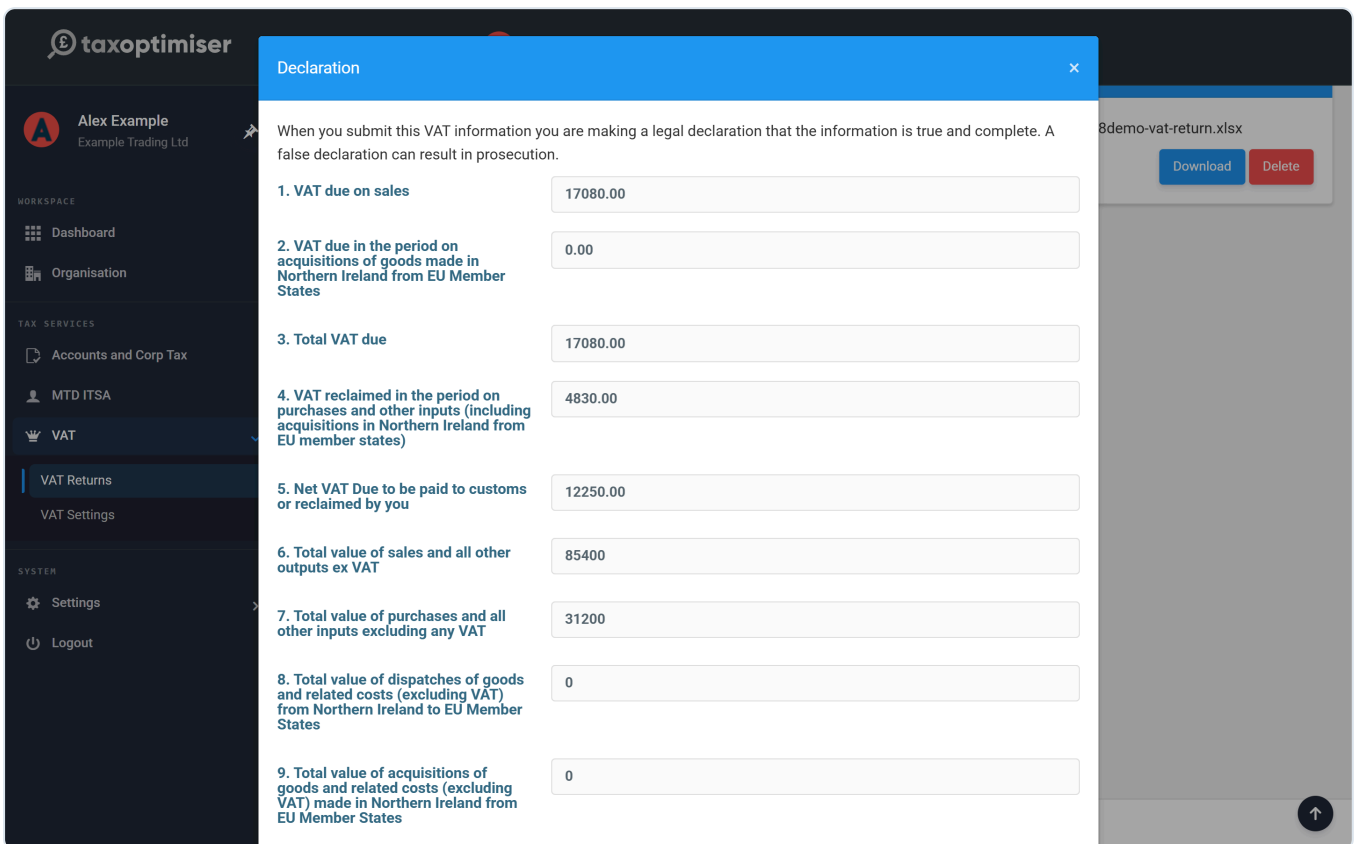
## IN SHORT

- Send is only available once the period has finished
- The declaration is the legal confirmation HMRC requires
- The receipt (form bundle number etc) is your proof of filing
- Every action is recorded in the return's audit log
- Errors: fix and retry; reconnect if authority has expired

Once the boxes are right, sending is two clicks – a declaration, then HMRC's acceptance comes back with a receipt that is your proof of filing. You can only send once the period has actually finished; until then the return shows a polite reminder instead of the send button.

## The declaration

Click **Send VAT Return**. The declaration asks you to confirm the figures are true and complete – this is the legal declaration HMRC requires, so only accept it once you've checked the boxes. You can add an internal note (it stays in Tax Optimiser, nothing extra goes to HMRC). Click **Accept**.



## What happens next

The return is queued and submitted to HMRC using the authority you granted, and the **Submission Status** moves from *Submitting to HMRC* to *Submission Accepted* – the screen updates itself, no need to refresh. In demo mode the cycle completes instantly and nothing leaves Tax Optimiser.

The screenshot displays the Tax Optimiser interface for a VAT Return. The main content area is titled "VAT Return" and includes a "Details" tab and an "Audit Log" tab. The return details are as follows:

Field	Value
Start Date	01/03/2026
End Date	31/05/2026
Due Date	07/07/2026
HMRC Status	Fulfilled
Submission Status	Completed

Below the details, there is a "Values" section:

Value	Amount
1. VAT due on sales	17080.00
2. VAT due in the period on acquisitions of goods made in Northern Ireland from EU Member States	0.00
3. Total VAT due	17080.00

On the right side, there is an "Uploaded File" section showing a file named "1106260728demo-vat-return.xlsx" with "Download" and "Delete" buttons. Below that is the "HMRC Confirmation Receipt" section, which contains the following information:

Field	Value
HMRC Processing Date	11/06/2026
Payment Indicator	BANK
Form Bundle Number	256660290587
Charge Ref Number	aCxFaNx0FZsCvyWF

A "Generate Receipt" button is located at the bottom of the HMRC Confirmation Receipt section. A notification banner at the top of the main content area states: "You are currently in demo mode and nothing will be sent to HMRC. If you have signed up to MTD and would like to send live returns click [Here](#)."

## Your HMRC receipt

On acceptance the **HMRC Confirmation Receipt** panel fills in: the **Processing Date**, the **Payment Indicator** (how HMRC expects the balance to move – BANK means direct payment to or from your bank), the **Form Bundle Number** (HMRC's internal reference for the submission) and, where money is due, a **Charge Ref Number**. These are generated by HMRC and are your proof the return was filed; **Generate Receipt** turns them into a PDF you can keep or send to a client.

# HMRC Confirmation Receipt

**HMRC  
Processing  
Date**



11/06/2026

**Payment  
Indicator**

BANK

**Form  
Bundle  
Number**


256660290587

**Charge  
Ref  
Number**

aCxFaNx0FZsCvyWF

**Generate Receipt**



If you have made a mistake,  don't worry. Unfortunately HMRC don't allow changes through software, but there is guidance available on how to correct VAT errors.

Please visit [HMRC's guidance on correcting VAT errors](#) and read section 4, as it depends on your scenario.

Spotted a mistake after filing? HMRC doesn't allow corrections through software – depending on the size of the error it's adjusted on your next return or reported separately. Follow the link on the receipt to HMRC's guidance on correcting VAT errors.

### The audit log

The **Audit Log** tab on the return records every step – who uploaded, who accepted the declaration, what was sent and HMRC's response – with timestamps. Useful when an accountant and client share the work.

The screenshot displays the Tax Optimiser interface for 'Alex Example' (Example Trading Ltd). A notification at the top states: "You are currently in demo mode and nothing will be sent to HMRC. If you have signed up to MTD and would like to send live returns click [Here](#)." The main content area is titled "VAT Return" and includes an "Actions" dropdown menu. Below this, there are two tabs: "Details" and "Audit Log". The "Audit Log" tab is active, showing a table of events:

Status	Description	UserName	Date
Submission Accepted	The VAT Return has been accepted		11/06/2026 20:13:45
Submitting to HMRC	Organisation VAT Return has been reviewed and Sent by Alex Example	Alex Example	11/06/2026 20:13:45
Confirmation of data required		Alex Example	11/06/2026 20:13:30
Confirmation of data required	The Total VAT Due was 0.00 is now 17080 The Total Value Purchases Ex VAT was 0.00 is now 31200 The Total Value Sales Ex VAT was 0.00 is now 85400 The Reclaimed VAT was 0.00 is now 4830 The Sales VAT Due was 0.00 is now 17080 The Net VAT Due was 0.00 is now 12250	Alex Example	11/06/2026 20:12:13

To the right of the audit log, there is an "Uploaded File" section showing a file named "1106260728demo-vat-return.xlsx" with "Download" and "Delete" buttons. Below that is an "HMRC Confirmation Receipt" section with the following details:

- HMRC Processing Date: 11/06/2026
- Payment Indicator: BANK
- Form Bundle Number: 256660290587
- Charge Ref Number: aCxFaNx0FZsCvyWF

A "Generate Receipt" button is located at the bottom of the receipt section.

## If HMRC rejects it

A rejected return shows the HMRC error and the status changes to *Submission Error* – fix the cause and send again with **Retry sending VAT return**. Two cases worth knowing:

- **Authority expired** – the error links you straight to the reconnect flow; grant authority again and retry.
- **"Already submitted"** – HMRC sometimes reports a duplicate even when the return went through, or it was filed in other software. Check the period in your Government Gateway account, then confirm in Tax Optimiser to mark it filed.

If an error doesn't make sense, contact [support@taxoptimiser.co.uk](mailto:support@taxoptimiser.co.uk).

# Liabilities, payments and the quarterly cycle

Track what HMRC says you owe and have paid, and settle into the quarterly routine.

## IN SHORT

- Liabilities show HMRC's charges and what is still outstanding
- Payments show what HMRC has matched to your VAT account
- New periods appear automatically; deadline is month-end + 7 days
- Refresh data re-pulls periods, liabilities and payments from HMRC
- First year free, then a yearly subscription

Submitting is half the story – HMRC also reports back what each return means in money: the charges it raised and the payments it has received. The **Liabilities** and **Payments** tabs on the VAT Returns screen keep that picture next to your returns, and the dashboard keeps the next deadline in front of you.

## Liabilities: what HMRC says you owe

The **Liabilities** tab lists each charge HMRC has raised – typically a *VAT Return Debit Charge* per submitted quarter – with its period, due date, the **Original Amount** and the **Outstanding Amount** still unpaid. When the outstanding amount reaches zero, that quarter is settled; anything outstanding also surfaces on your dashboard card as an amount due to HMRC.

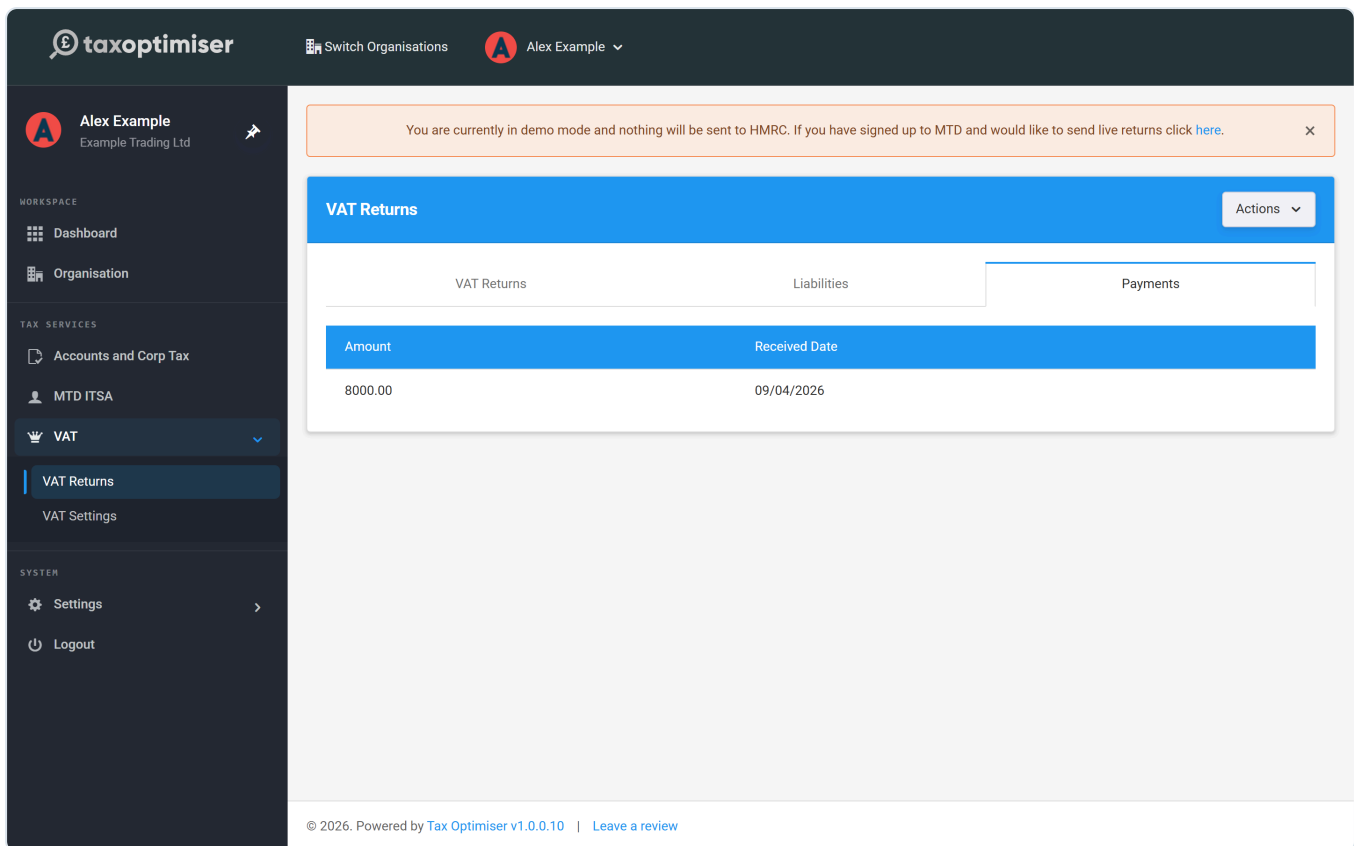
The screenshot shows the Tax Optimiser interface for 'Alex Example' (Example Trading Ltd). The main content area is titled 'VAT Returns' and has three tabs: 'VAT Returns', 'Liabilities', and 'Payments'. The 'Liabilities' tab is active, displaying a table with the following data:

Type	From Date	To Date	Original Amount	Outstanding Amount	Due Date
VAT Return Debit Charge	01/12/2025	28/02/2026	8000.00	0.00	07/04/2026 00:00:00

At the top of the interface, there is a notification: "You are currently in demo mode and nothing will be sent to HMRC. If you have signed up to MTD and would like to send live returns click [here](#)." The footer of the interface reads: "© 2026. Powered by Tax Optimiser v1.0.0.10 | [Leave a review](#)"

## Payments: what HMRC has received

The **Payments** tab mirrors it from the other side – the payments HMRC has matched to your VAT account and the date each was received. Liabilities and payments refresh from HMRC alongside your periods, so allow a little time after paying before expecting it to appear.



The screenshot shows the Tax Optimiser interface for 'Alex Example' (Example Trading Ltd). The main content area is titled 'VAT Returns' and has three tabs: 'VAT Returns', 'Liabilities', and 'Payments'. The 'Payments' tab is active, displaying a table with the following data:

Amount	Received Date
8000.00	09/04/2026

At the top of the interface, there is a notification: 'You are currently in demo mode and nothing will be sent to HMRC. If you have signed up to MTD and would like to send live returns click [here](#).' The footer of the interface reads: '© 2026. Powered by Tax Optimiser v1.0.0.10 | [Leave a review](#)'

## The quarterly rhythm

After your first cycle the routine is pleasantly dull: a new open period appears by itself after each quarter ends, the dashboard VAT card shows it with its **file-by date** (one calendar month and seven days after the period ends), and you upload, check and send as in the last two articles. If a period you expect is missing, **Refresh data** on the VAT Returns screen re-pulls everything from HMRC.

## What it costs

VAT submissions are free for the first year from your first live return. After that it's a small yearly subscription – you'll be prompted in the app when the free year ends, and current prices are on the [pricing page](#).

That's the full VAT journey. Start again from *VAT: getting started*, or browse the rest of the *Help Centre*.

# Reconnect to HMRC (and fix the "wrong account" message)

Renew your HMRC connection in two minutes, and sort out the "incorrect Government Gateway account" message.

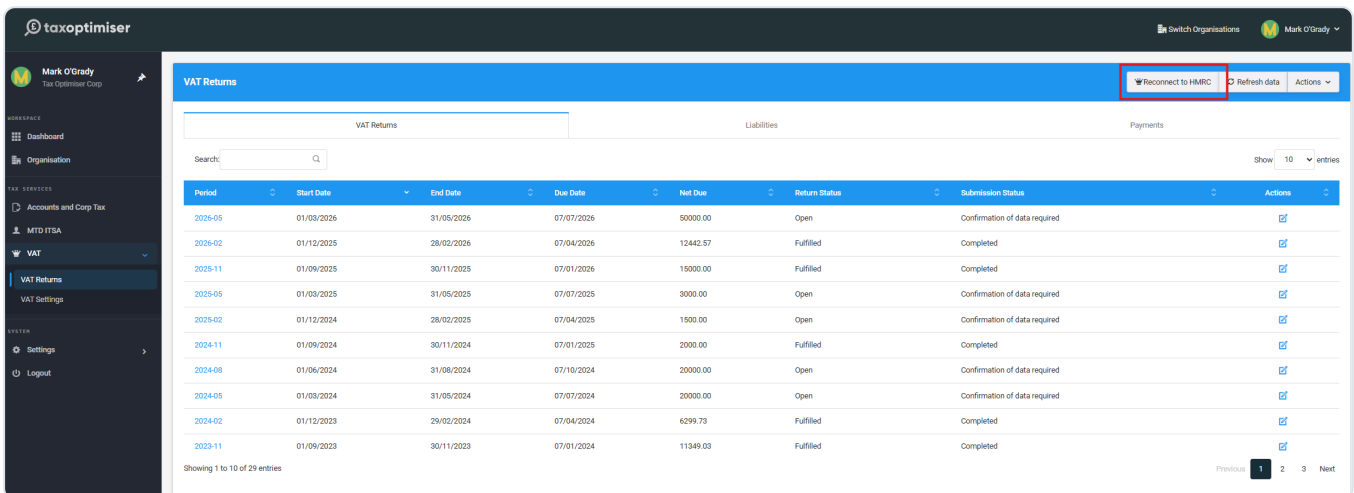
## IN SHORT

- Reconnect from VAT, VAT Returns - the button is on the top blue bar
- Permission lasts 18 months, then you reconnect the same way
- The "wrong account" message just means the wrong Gateway sign-in was used
- The right account shows a VAT section on your HMRC Business tax account
- Your Gateway user ID was emailed to you when the account was created

From time to time Tax Optimiser needs to be reconnected to HMRC – the permission you grant lasts 18 months, and occasionally a connection is made with the wrong sign-in details. The good news: reconnecting takes about two minutes, and if you've seen a *"connected to an incorrect Government Gateway account"* message, this article shows you exactly how to sort it out.

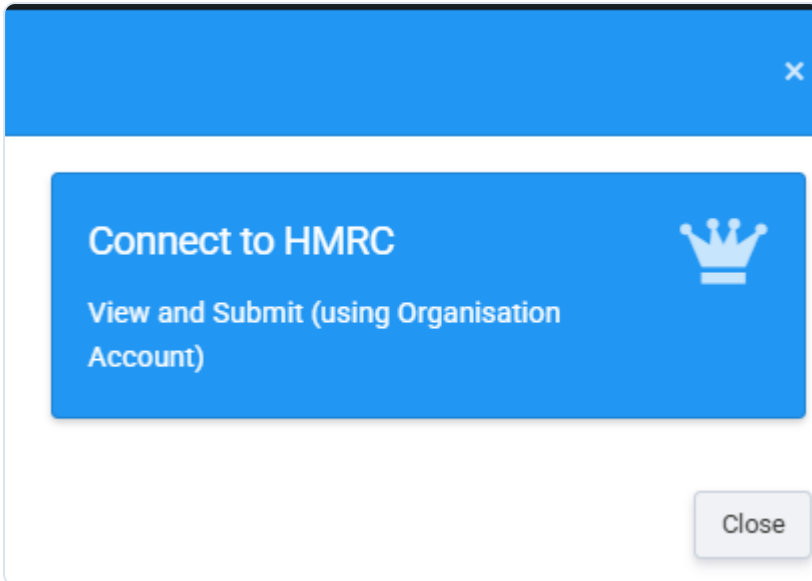
## Step 1: Reconnect to HMRC

From the sidebar, go to **VAT** → **VAT Returns**. On the blue bar at the top of the screen, click **Reconnect to HMRC**.

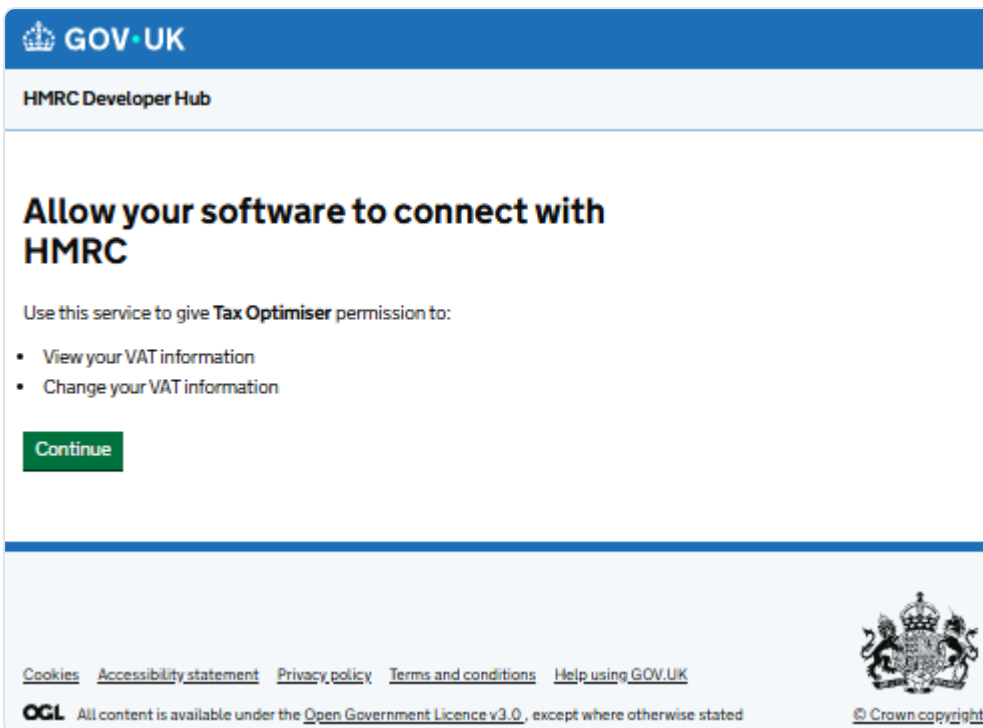


The screenshot shows the Tax Optimiser interface for VAT Returns. The top blue bar contains a navigation menu with the following items: "Reconnect to HMRC" (highlighted with a red box), "Refresh data", and "Actions". Below this is a table of VAT Returns with the following columns: Period, Start Date, End Date, Due Date, Not Due, Return Status, Submission Status, and Actions. The table contains 10 rows of data, with the first row showing a period of 2026-05, start date of 01/03/2026, end date of 31/05/2026, due date of 07/07/2026, not due amount of 5000.00, return status of Open, and submission status of Confirmation of data required. The bottom of the table shows "Showing 1 to 10 of 29 entries" and a pagination control with "Previous", "1", "2", "3", and "Next".

Choose **Connect to HMRC** – this connects using your organisation's own account, letting Tax Optimiser view and submit your VAT returns.



You'll be taken to HMRC's website. The first page simply explains what you're agreeing to – press **Continue**.



The next page tells you what to have ready: the Government Gateway user ID and password you use for your *business's* VAT. Click **Sign in to the HMRC online service**.

## What you will need

You will need the correct HMRC user ID and password. For example, if you want to authorise VAT software, use your VAT HMRC user ID and password.

If you are a tax agent, [check you are using the right account \(opens in new tab\)](#).

You might need to confirm who you are by answering some security questions on, for example, your passport, P60 or other documents.

[Sign in to the HMRC online service](#)

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Enter your **Government Gateway user ID** (up to 12 characters) and **password**, then press **Sign in**. HMRC may also ask you a security question or send a code to your phone.


**Keeping your information secure**

Do not share your Government Gateway user ID and password with anyone else.

# Sign in using Government Gateway

Government Gateway user ID

This could be up to 12 characters.

Password

[Sign in](#)

## No sign in details

[I do not have a Government Gateway User ID](#)

## Problems signing in

[I have forgotten my password](#)

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

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

Finally, press **Give permission**. That's it – you're reconnected for another 18 months, and your VAT periods will refresh on the VAT Returns screen.

GOV.UK

HMRC Developer Hub

Mark O'Grady

## Allow your software to connect with HMRC

I give Tax Optimiser permission to:


- View your VAT information
- Change your VAT information

**Give permission** Do not give permission

Your permission lasts 18 months. After that, you will need to give permission again. You can [remove permission at any time](#).

Tax Optimiser will conform to their [privacy policy \(opens in new tab\)](#) and their [terms and conditions \(opens in new tab\)](#).

## Seen this message? You're connected to the wrong account



**There was a problem**

There have been the following errors: It appears that the company is connected to an incorrect Government Gateway account. You might be using the wrong company account or self-assessment account. To resolve this issue:

- 1.) Visit the [HMRC Business Dashboard](#) and verify that you are using the correct Government Gateway account.
- 2.) Once you confirm it is the correct account, reconnect by clicking the "Reconnect to HMRC" button located on the top blue bar of the VAT return list screen. Follow the instructions provided (press continue on the first HMRC page).

If you have any further questions, please do not hesitate to contact our support team at [support@taxoptimiser.co.uk](mailto:support@taxoptimiser.co.uk).

**OK**

Don't worry – nothing is broken. This message means the Government Gateway sign-in you used doesn't hold this company's VAT registration. It usually happens because you have more than one set of HMRC sign-in details – for example a *personal* one for your own self-assessment and a *business* one for the company's VAT – and the wrong one was used when connecting. The fix is simply to check which account is the right one, then reconnect with those details.

## Check your account on the Government's website

Go to [www.gov.uk/log-in-register-hmrc-online-services](http://www.gov.uk/log-in-register-hmrc-online-services) and press the green **Sign in** button.

# HMRC online services: sign in or set up an account

## Contents

- Sign in or set up an account
- [Get help with signing in to HMRC online services](#)

## Sign in or set up an account

Sign in to your HM Revenue and Customs (HMRC) online account for things like a personal or business tax account, Self Assessment, Corporation Tax, PAYE for employers, VAT and the Construction Industry Scheme.

If you do not already have sign in details, you'll be able to create them.

This guide is also available [in Welsh \(Cymraeg\)](#).

[Sign in >](#)

### Which sign in details to use

There are 2 ways to sign in to HMRC online services:

- Government Gateway – sign in with a user ID (up to 12 characters) and password
- GOV.UK One Login – sign in with an email address and password

### If you already use HMRC online services

Continue to use the sign in details you have. This could be:

### Related content

[HMRC service availability and issues](#)

### Collection

[Paying HMRC: detailed information](#)

Choose **Government Gateway** and press **Continue**.

**Beta** This is a new service. Help us improve it and [give your feedback \(opens in new tab\)](#).

[< Back](#)

## Sign in to HMRC



Government Gateway

Use your Government Gateway user ID which can be up to 12 characters



GOV.UK One Login

Use your GOV.UK One Login email address if you have used this to sign in to HMRC before

or



Create new sign in details

We will tell you if you need to create a GOV.UK One Login or a Government Gateway user ID

[Continue](#)

[Is this page not working properly? \(opens in new tab\)](#)

Sign in with the same user ID and password you used when connecting in Tax Optimiser.

Keeping your information secure

Do not share your Government Gateway user ID and password with anyone else.

# Sign in using Government Gateway

Government Gateway user ID

This could be up to 12 characters.

Password

Show

Sign in

## No sign in details

[I do not have a Government Gateway User ID](#)

## Problems signing in

[I have forgotten my password](#)

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

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

**Forgotten your details?** Use the links under *Problems signing in* on this page – HMRC can recover your user ID, your password, or both. A handy shortcut: your Government Gateway user ID was emailed to you when the account was first created, so try searching your email inbox for “Government Gateway”.

Once signed in, you'll land on your **Business tax account**. Scroll down and look for a **VAT** section showing your VAT registration number – if it's there, these are the right details to use.

# Business tax account

View and access your business taxes in one place

Add a tax to your account to [get online access to a tax, duty or scheme](#).

Payments will take up to 7 working days to show, depending on how you pay. After you complete your return your tax calculation will take up to 2 days.

These processing times do not apply to PAYE for employers. [View processing times for PAYE for employers](#).

## Corporation Tax

Corporation Tax Unique Taxpayer Reference 156156123

### Your returns

You may have returns to complete.

Complete your Corporation Tax return using commercial software. View the list of [HMRC-recognised software suppliers](#).

[More details about your Corporation Tax](#)

### Your payments

You owe **£0**.

[View your Corporation Tax statement](#)

[Make a Corporation Tax payment](#)

## PAYE for employers

Employer PAYE reference 111/150000  
Accounts Office reference 1452755454

Forms P11D and P11D(b) can only be submitted and amended online. [Send P11Ds online](#) to report employee expenses and benefits by 6 July.

[Find out if you can claim for Employment Allowance](#).

### Your upcoming payments

You have no upcoming bills or charges to pay. You can still [make a payment on account](#) for an upcoming tax month.

[Manage your Direct Debit](#)

[Annual statements and payment record](#)

[View tax codes or notices and set up alerts](#)

### Your overdue payments

You have no overdue payments.

## VAT

VAT registration number 121454514

### Your returns

You have 2 returns to submit

[View return deadlines](#)

[View submitted returns](#)

[Manage your VAT account](#)

### Your payments

[Check what you owe and make a payment](#)

[View payment history](#)

[Track repayments and manage your bank account](#)

**Can't see VAT on the dashboard?** Then this sign-in doesn't have access to your business's VAT. You may have signed in to a personal account (the one you use for self-assessment) or to a different business's account – try your other sign-in details. (Accountants' *agent* accounts look different again; if your accountant manages your VAT, ask them to connect using their agent login.)

## Reconnect with the right details

Once you've confirmed which account shows your VAT, head back to Tax Optimiser: **VAT** → **VAT Returns**, click **Reconnect to HMRC** on the top blue bar, and follow the steps from the top of this article using the confirmed sign-in details.

Still stuck? Email us at [support@taxoptimiser.co.uk](mailto:support@taxoptimiser.co.uk) – we're happy to help.

Related: *Connect to HMRC and find your VAT periods.*