

OPTO RELEASE 7.3

Changes Visible to Filers

License Changes

When viewing a license, users will be able to see a new field “License Activation Date”. This field is only editable by state users and is for informational purposes. It does not determine their filing requirement.

A - Jenna -Training- Active

Action ▾

Profile

Address

Contact

Filing Requirement

LICENSE NAMES

LICENSE NAME

A-Training-Jenna-WMBW

LICENSE TRADE NAME

A-Training-Jenna-WMBW

LICENSE DETAILS

LICENSE TYPE

WMBW

DISTRICT

1

OLCC LICENSE NUMBER

111111

OLCC PREMISES NUMBER

000222222

LICENSE ACTIVATION DATE

10/02/2025

FILING REQUIRED

Yes

FILING FREQUENCY

Monthly

Back to Account

When hovering over the Filing Frequency value, filer users will be able to see the below message.

Profile

Address

Contact

Filing Requirement

LICENSE NAMES

LICENSE NAME

A-Training-Jenna-WMBW

LICENSE TRADE NAME

A-Training-Jenna-WMBW

LICENSE DETAILS

LICENSE

DIS

OLCC LICENSE NU

OLCC PREMISES NU

LICENSE ACTIVATION

FILING REQUIRED

FILING FREQUENCY

Monthly

This value is automatically determined based on the filing frequency set on the Filing Requirement tab of the license. The system selects the frequency whose start and end dates include today's date.

The “Dates” tab was renamed to “Filing Requirement”.

The “Start Date” and “End Date” columns were renamed to “Filing Start Date” and “Filing End Date”.

A new column “Filing Frequency” was added.

This table will show when a filer is required to file a return and what type of return (Annual, Monthly, Quarterly).

ProfileAddressContactFiling Requirement

FILING REQUIREMENT

TABLE MODECHART MODE

SORT BY: Filing Start Date ▾

Filing Start Date	Filing End Date	Filing Frequency	Actions
01/01/2022		Monthly	

1 Record Found

Back to Account

When accessing the Filing Requirement tab, the user will now, by default, see the table mode layout.

ProfileAddressContactFiling RequirementSecondary Licenses

FILING REQUIREMENT

TABLE MODECHART MODE

SORT BY: Filing Start Date ▾

Filing Start Date	Filing End Date	Filing Frequency	Actions
06/01/2023	11/30/2023	Monthly	
12/01/2023	01/01/2024	Monthly	
02/01/2024		Monthly	

3 Records Found

Back to Account

Filing Changes

Currently, when a user creates a filing, the filing period drop-down defaults to the current period. Going forward, the dropdown will default to the period that has not been created. Users retain the option to select a different filing; however, they will be prompted to submit filings in chronological order.

The screenshot displays a web form titled "CREATE FILING". It features a "FILING PERIOD" dropdown menu, a "Create Filing" button, and a "Cancel" button. A tooltip above the dropdown reads "Select the filing period from the dropdown". The dropdown menu is open, showing a list of months from MAY 2022 to DEC 2023. The "MAY 2022" option is highlighted with a red box.

CREATE FILING

FILING PERIOD •

Select the filing period from the dropdown

MAY 2022

JUN 2022

JUL 2022

AUG 2022

SEP 2022

OCT 2022

NOV 2022

DEC 2022

JAN 2023

FEB 2023

MAR 2023

APR 2023

MAY 2023

JUN 2023

JUL 2023

AUG 2023

SEP 2023

OCT 2023

NOV 2023

DEC 2023

Create Filing Cancel

Switching Between Monthly and Annual Frequency

Before Release 7.3, effective 10/24/2025, the system did not transfer ending inventories from annual returns to serve as beginning inventories for monthly returns when switching from annual to monthly reporting.

Moving forward, when transitioning between annual and monthly reporting periods, the system will transfer ending inventories from the annual return to serve as beginning inventories for the monthly return.

Note: BI values are carried over only if the filing is created after the last filing reaches complete status. If created earlier, users must manually enter BI values or delete the in-process filing to start over and carry forward completed values.

Before Release 7.3, effective 10/24/2025, credits from monthly and annual filings couldn't be used to pay for invoices interchangeably. Now, users can apply credits from either filing frequency to pay for the other.

Credit Management Changes

After the deactivation of a license, the system will now allow users to access and use the credit management of the inactive license.

In credit management, the filer user will see the redesigned credit detail summary section.

“Other Credits” was renamed to “Credits”.

“Original” was split into two sections “Credit Additions” and “Credit Reductions”.

“Credit Additions” will represent all positive entries into credit management.

“Credit Reductions” will represent all negative entries into credit management

CREDIT DETAIL				AVAILABLE BALANCE: \$0.00	
	Credit Additions		Credit Reductions		Balance
Credits		\$1,393.20		(\$1,393.20)	\$0.00
Claims		\$1,300.00		(\$1,300.00)	\$0.00
Audit Credit		\$220.00		(\$220.00)	\$0.00
Total Credit		\$2,913.20		(\$2,913.20)	\$0.00

Invoice Changes

From the invoice page, Users will now be able to Go to Credit Management from the invoice page using the “Go to Credit Management” button.

Invoice

[Go to Credit Management](#)
[Back to Accounts](#)

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Jenna sdf

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PRIVILEGE TAX ID

LICENSE TYPE

INVOICE STATUS

INVOICE TYPE

PT421850

PT-WMBW

Transferred to Credit

Filing

FILING INFO

LOCATION

CREATED BY

MAR 2022 - Original (1)

leesburg

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