

## ADD USERS TO YOUR PROFILE

Once you have registered your administrator, you can add other users at your practice as users and assign user rights and profiles to them.

### Step 1:

Click on “Users” at the top left hand side of the screen.



The screenshot displays the SARS eFiling website interface. At the top left is the SARS eFiling logo. To the right are navigation buttons for Home, Site Map, Terms & Conditions, and SARS Home. On the left side, a vertical menu contains buttons for Users, Organisation, Returns, Services, and Log Out. The 'Users' button is highlighted with a red rectangle. Below the menu is a user profile for 'T Snyckers' with a sub-menu for 'User' containing links for Register New, Change Details, User Rights, Change Own Password, and Change Registered Details. The main content area shows the 'Section: User' header, followed by user details for Miss Telta Snyckers (Login Name: Telta5157). Below this is the heading 'Instructions on how to use this section' and a sub-heading 'How do I register a user?' with a list of four steps. Further down is the heading 'What are the access levels?' followed by a paragraph explaining administrator roles and a list of access levels, including 'Administrator'.

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**T Snyckers**

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**Special Links**

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**ABOUT SSL CERTIFICATES**

**Section: User**

**User** Miss Telta Snyckers  
**Login Name** Telta5157

**Instructions on how to use this section**

**How do I register a user?**

- Click on REGISTER NEW and complete the user details. Provide the new user with a login name and password. SARS eFiling recommends allocating a simple password such as "password" as the new user will be asked to change this for the first time that they use the service.
- Tick the appropriate boxes for the relevant tax returns that you wish to give the user access to and then allocate the user a level of access right.
- Click on continue and this will bring up the users login name. Make a note of this to give to the new user.
- CHANGE DETAILS allows you to change the user details and access rights if required.

**What are the access levels?**

An administrator will register all users and assign them with relevant rights, to one or various companies and/or returns types. The use of SARS eFiling's online hierarchy will also facilitate this process. The different user rights include:

- **Administrator** This user has full control, registers other users, assigns rights and registers companies. The administrator does not contact SARS eFiling to effect an addition or change

**Step 2:**

Click on “register new” on the left hand side of the screen and complete user details.

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**Required Details**

Title:  Initials:  Firstname:  Surname:

Identification Type:  ID Number:

Do you wish to receive SMS notifications for the following events:  Yes  No

- After activation as an eFiler
- After any payment

Cell Number:

E-mail Address:

Telephone Number: (  )

**Login Account Information**

SARS eFiling Login:

Password:  ⓘ

Confirm Password:

**Step 3:**

Provide the new user with a login name and password – we recommend that you use an easy password which the user can change on their first login.

On the same screen, it is important that you click on “This user is a “tax consultant / tax practitioner”

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**This user is a:**

- Tax Consultant / Tax Practitioner
- Organisation Representative

[Click here](#) to update the user rights per tax payer.

**User Authorisation Level**

As part of our ongoing efforts to keep you, the taxpayer, informed we send out periodic communications either via email or SMS.  
Please indicate whether you would like to be included in these communications.  Yes  No

See below for optional details that you may want to capture now.

**Optional Details**

Fax Number: (  )

Designation:

Postal Address:

**Step 4:**

Now select "User authorisation level" – Admin, Payments, Submissions, Completions, View only, No access.

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This user is a:  Tax Consultant / Tax Practitioner  Organisation Representative

[Click here](#) to update the user rights per tax payer.

**User Authorisation Level**

As part of our ongoing efforts to keep you informed we send out periodic communications either via email or SMS. Please indicate whether you would like to be included in these communications.  Yes  No

See below for more information that you may want to capture now.

Register Reset

**Optional Details**

Fax Number ( )

Designation

Postal Address

Click on "Register"

**Step 5:**

You will now get a "User summary" screen, which you can print for your records, or you may proceed to register additional users in the same manner as detailed above.

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User Register New Change Details User Rights Change Own Password Change Registered Details Special Links

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**User Summary**

**Basic Details**

Login Name: Telita4762

Name: Miss Telita Snyckers

Email: tsnyckers@sars.gov.za

Telephone Number: (012) 4226514

Please make a note of the login name and give it only to the user for whom it is intended

Continue Print Summary

# ADDING TAXPAYERS TO YOUR PROFILE: BULK UPLOADS

## Step 1:

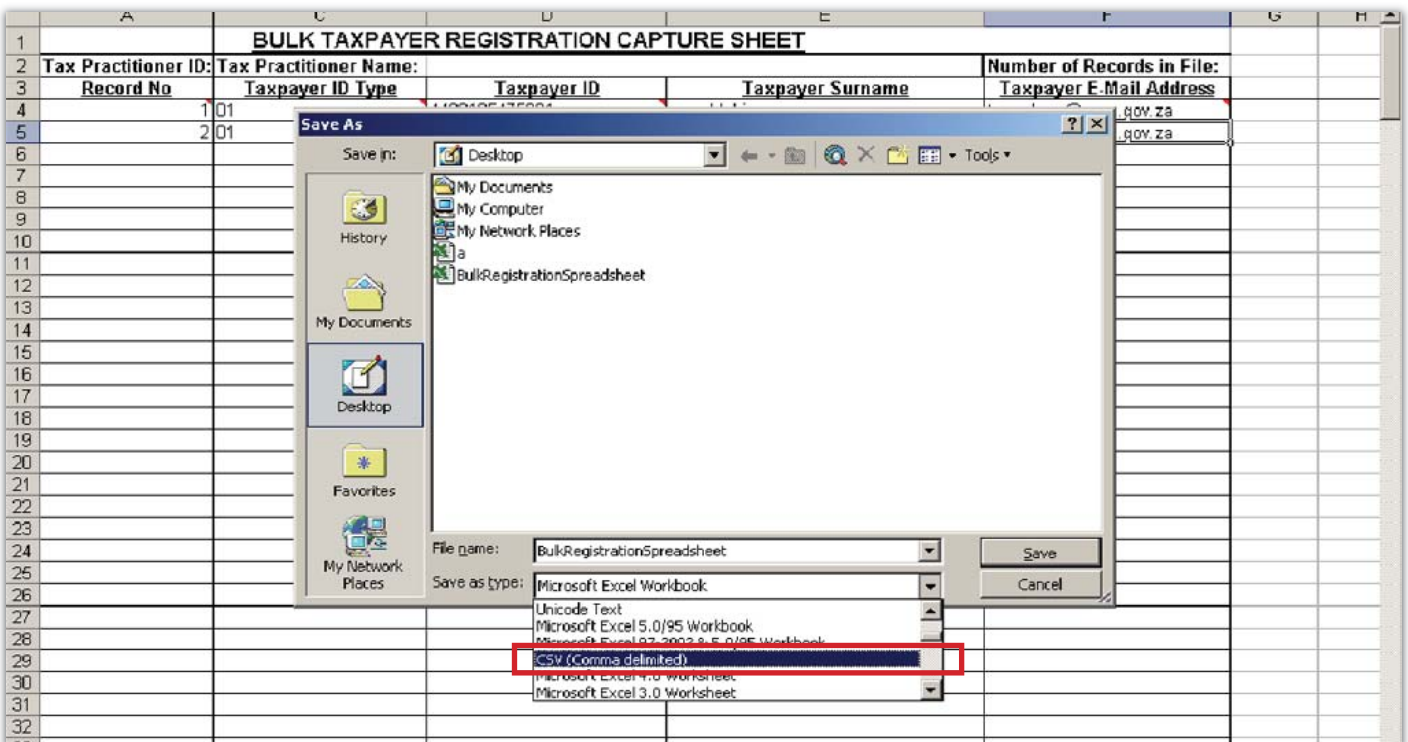
Click on "Organisation" and then on "Upload Individuals".



## Option A:

### Step1:

Right click on "Click here for spreadsheet", click on "Save target as" and save it to your PC by clicking on Save. You will only be able to add the details of 252 taxpayers per sheet. Please complete and upload separate sheets if you want to register more taxpayers. Complete the fields, and save the sheet as a CSV type on your PC.



**Step 2:**

Once the sheet has been completed, go back to “Organisations”, “Bulk registration” and “Upload individuals”, click on “Browse” to find the correct file on your PC, then click on “Upload”.

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**IT12 Individual Taxpayer Bulk Upload**

Welcome to the functionality for bulk registration of individual tax payers. This functionality allows you to upload multiple tax payers at once using a CSV (Comma Separated Values) file format (see below for specification).

[Click here for file specification \(.doc - 232Kb\)](#)  
[Click here for spreadsheet \(.xls - 41Kb\)](#)

*Note: If the documents open in the browser, please use the "Right Click, Save As..." option.*

Please click on "Browse" and select your file to upload. Then click on the "Upload" button in order to start the upload process.

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Change Details  
Banking Details  
Organisation Tax Types  
Summary  
Interface  
Workflow  
VAT Vendor Search  
Change Registered Details  
**Bulk Registration**  
Upload Individuals  
File Status

**Step 3:**

You will then get a message that reads “File successfully uploaded. Please check the status for each taxpayer from the status menu item”.

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**IT12 Individual Bulk Upload File Statuses**

Received	File Name	File Size	Status	Failed Reason	View
11 Aug 2007 12:05:16.383	BulkRegistrationSpreadsheet ts.csv	2458	Upload for bulk registration succeeded		<a href="#">View Records</a>
1					

**Organisation**  
Register New  
Change Details  
Banking Details  
Organisation Tax Types  
Summary  
Interface  
Workflow  
VAT Vendor Search  
Change Registered Details  
**Bulk Registration**  
Upload Individuals  
File Status

## Step 4:

Click on "File Status" on the left hand side of the screen under Bulk Registration. Click on "View uploads". You will be able to view the status of the entries on your sheet under the "Status" column.

The screenshot shows the SARS eFiling interface. At the top, there are navigation buttons for Home, Site Map, Terms & Conditions, and SARS Home. On the left, there is a sidebar with navigation options: Users, Organisation, Returns, Services, Log Out, KRUGER mc (Miss), and a 'Back' button. Below this, there is a menu for 'Bulk Registration' with options: Upload Individuals, File Status (highlighted with a red box), and Special Links. The main content area is titled 'Individuals uploaded in file' and contains a table with the following data:

Record Num	Reference Num	ID/Passport Num	Surname	Status	Activation Status	View Errors
1	0733913149	4409195475081	ramchhabhi	Awaiting Upload		
2	0734014152	7510075525080	thlaka	Awaiting Upload		

## Option B:

### Step 1:

You will be able to extract taxpayer information from your administration system or accounting software into CSV (comma delimited) files for bulk upload to the SARS eFiling facility. The required format for a CSV file to be loaded is as follows:

- The maximum number of records per file is limited to 500, to avoid the failure of uploading files that are too large in size
- The record format of the data must be Windows NT compliant ASCII
- The file will only consist of transaction records.
- The head / control information will be deduced at the time of the upload of the file.
- Required record structure:

Field name	Description	Length	Format	Rules
Record number	Sequential number that uniquely identifies a record contained in the file	3	Numeric	(1)
TAX-REF-NO	Personal tax reference number of an individual	10	Numeric	(1)
TAX-ID-TYPE	Taxpayer ID type	2	Alphanumeric	(1), (3)
TAX-ID	Taxpayer ID	15	Alphanumeric	(1), (4)
TAX-NAME	The surname of the taxpayer in the case of an individual. The company name in the case of another entity.	120	Alphanumeric	(1)
TAX-E-EMAIL	The email address of the taxpayer	50	Alphanumeric	(2)

Data rules:

1. Mandatory
2. Not optional
3. The taxpayer ID type field indicates which ID number if provided for the taxpayer
  - o 01 – SA ID number
  - o 02 – Passport number
  - o (please note only 01 and 02 are valid for this version of the specification)
4. The taxpayer ID may be a SA ID for in individual, a company / CC registration number for a company, or a CC or a Trust deed number for a trust.