BIR Tax Compliance onboarding guide

Stand-in: Santos Print Studio · BIR Tax Compliance · November 2026

Watch the lesson, then do the same with this page open. AutoSOA prepares and tracks your returns. It does not file them or pay BIR. Its answers are not tax advice: ask a Philippine tax professional about anything marked for one.

Lessons

#	Lesson	For	Min	At the end you will have
1	First sign-in and the BIR rules	owner	2	the BIR rules loaded
2	Your team	owner	3	Ana can prepare returns
3	BIR registration	owner	2	the registration saved
4	Taxpayer profile	owner	2	the profile saved, the calendar filled
5	Your 2303 on file	owner	1	the 2303 checked in BIR documents
6	What BIR has on record	owner	3	registration and income tax answers checked
7	How the business runs	owner	2	operations and history answered
8	Taking over from your bookkeeper	owner	1	the handover list started
9	A rule that needs you	owner	1	the weekend rule checked
10	Reading the calendar	owner	2	the next deadline found
11	What your bookkeeper filed	owner	4	Q1 and Q2 1701Q on record, with proof
12	Your sales	owner	1	Q3 sales checked
13	Prepare the 1701Q	staff	2	the Q3 1701Q computed
14	A customer's 2307	staff	1	the credit entered
15	Review and approve	staff, owner	2	the 1701Q approved
16	File it	owner	2	the 1701Q filed, acknowledgment checked
17	Pay it and prove it	owner	2	Filed and paid
18	The month-end check	owner	2	a month's check done, records exported
19	A return with no proof	staff, owner	3	the Q3 2551Q filed late and paid
20	A quarter with no sales	staff, owner	3	the Q1 2551Q filed, with nothing to pay
21	The wrong document	owner	2	the wrong paper rejected, the right one checked
22	A mistake after filing	staff	2	the amendment sent for review
23	BIR Academy	staff	2	a lesson finished
24	Your practice company	staff	1	a practice company opened, and back

Lesson 1 First sign-in and the BIR rules

For owner · 2 min · video `tax-onboard-01.webm`

At the end you will have: the BIR rules loaded

Before you start: Pause the video at any time, and do the same on your screen.

Steps

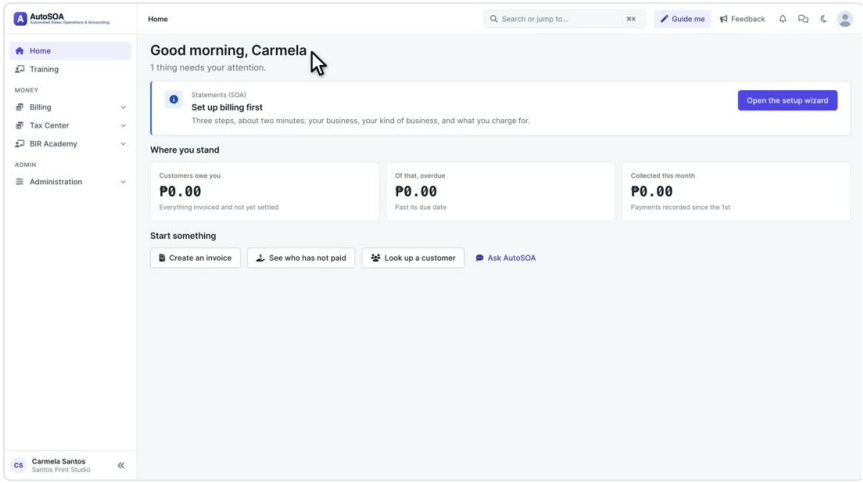
1

AutoSOA gives you a link, a user name and a password. The link opens this page.

Type your user name in User name or email.

Type your password in Password.

Click Log in.

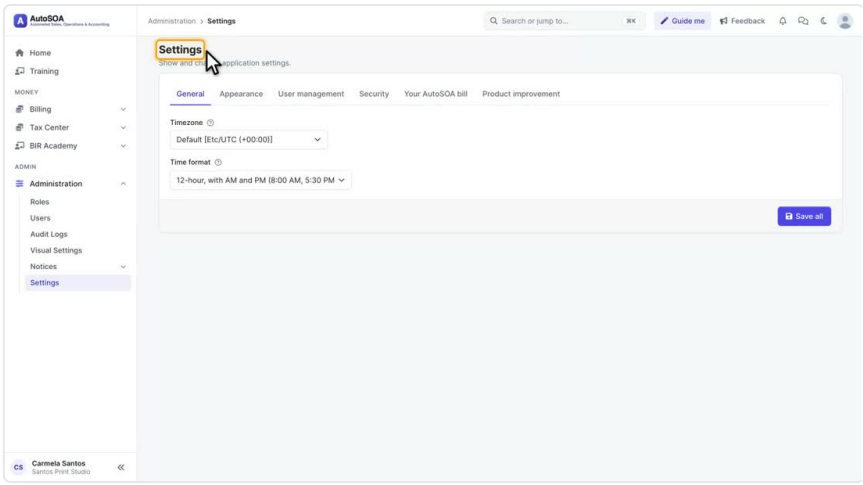


Home opens, and it greets you by name. The Billing course teaches Home. This course starts in the Tax Center.

2

If you did the Billing course, you did this already.

Open Administration, then Settings.



This is Settings. It holds the settings for your whole business.

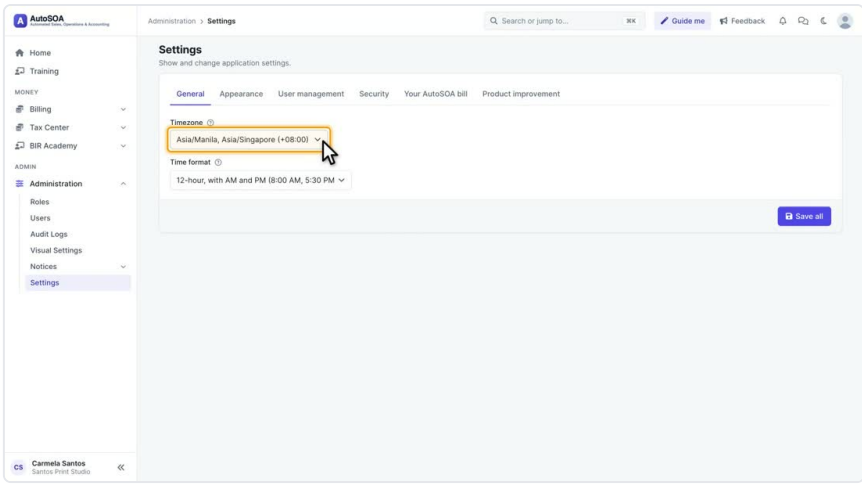
3

Every date and time in AutoSOA uses this time zone.

Choose Asia/Manila in Timezone.

Click Save all.

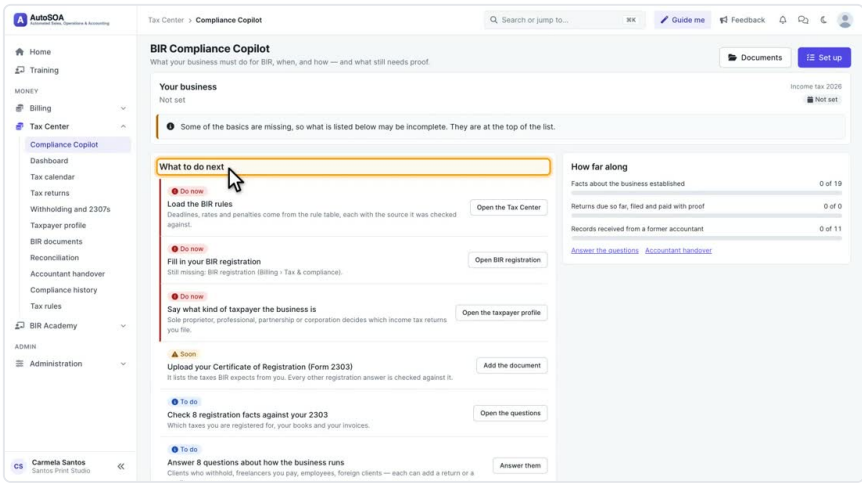
Click OK.



The page loads again. Timezone shows Asia/Manila.

4

Open Tax Center, then Compliance Copilot.

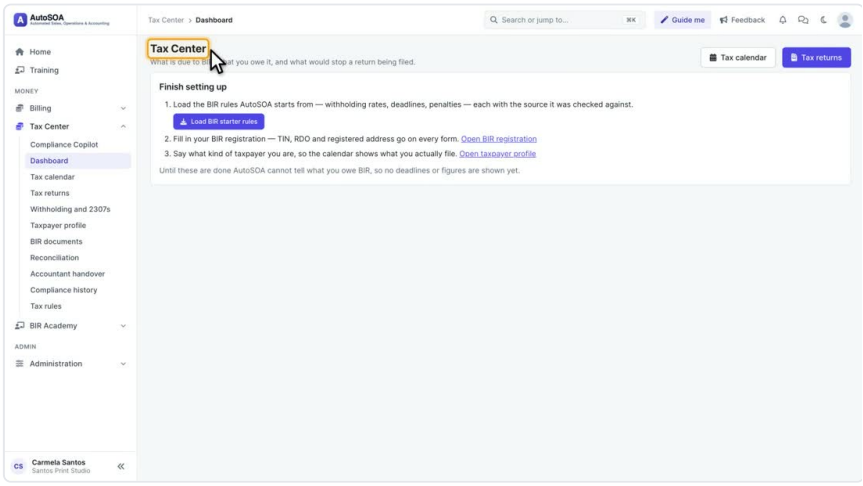


This is the Compliance Copilot. It says what your business must do for BIR, and what still needs proof. What to do next is your list. The most urgent item is at the top.

5

The first item is Load the BIR rules. Rates, deadlines and penalties all come from these rules.

Click Open the Tax Center.

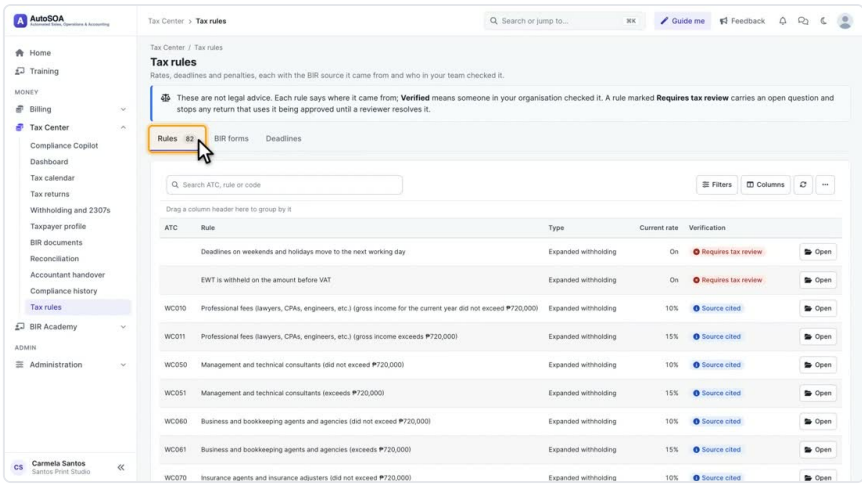


This is the Tax Center Dashboard.

6

Finish setting up shows what is still missing.

Click Load BIR starter rules.



A message says how many rules, forms and deadlines AutoSOA loaded. Now see the rules. Open Tax Center, then Tax rules. This is Tax rules. Each rule shows the BIR source it came from. Here are your rules. The tab shows how many.

You signed in. You set your time zone. You looked at the Compliance Copilot, and you loaded the BIR rules. Next, you add the person who prepares your returns.

Check yourself

▼ Where do you load the BIR rules?

Open **Tax Center**, then **Dashboard**. Click **Load BIR starter rules**.

▼ What does the Compliance Copilot show?

What your business must do for BIR, and what still needs proof. **What to do next** has the most urgent item at the top.

▼ Why do you set the time zone first?

Every date and time in the Tax Center's history reads in it. Set it to **Asia/Manila** on **Settings**.

Lesson 2 Your team

For owner · 3 min · video `tax-onboard-02.webm`

> **At the end you will have:** Ana can prepare returns
> **Before you start:** You need the account you opened in lesson one.

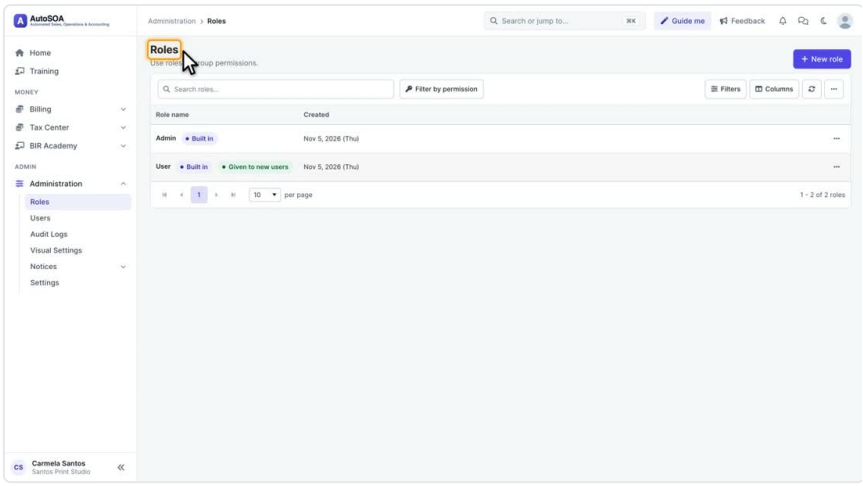
AutoSOA asks for two people on every return. One person prepares it. A second person approves it.

Steps

1

First, Ana needs a role.

Open Administration, then Roles.



This is Roles. A role is a list of things a person can do.

2

Four permissions stay with you, the owner. These are the checks on Ana's work.

Click New role.

Type Tax preparer in Role name.

Click Permissions.

Find "Tax Center" in the search box.

Turn on Tax Center.

Clear the search box.

Find "Approve tax" in the search box.

Turn off Approve tax returns.

Find "Record filing" in the search box.

Turn off Record filing and payment.

Find "Check BIR" in the search box.

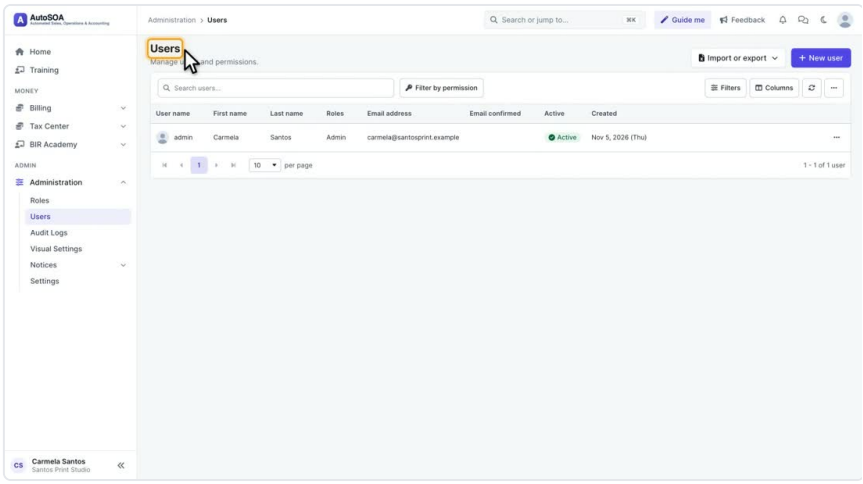
Turn off Check BIR documents.

Find "Verify tax" in the search box.

Turn off Verify tax rules.

Clear the search box.

Click Save.



Tax preparer is in the list of roles. Now add Ana. Open Administration, then Users. This is Users. It lists everybody who can sign in.

3

Click New user.

Type Ana in First name.

Type Reyes in Last name.

Type her email address in Email address.

Type ana in User name.

Turn off Set random password.

Type a first password in Password.

Type it again in Password (repeat).

Turn off Should change password on next login.

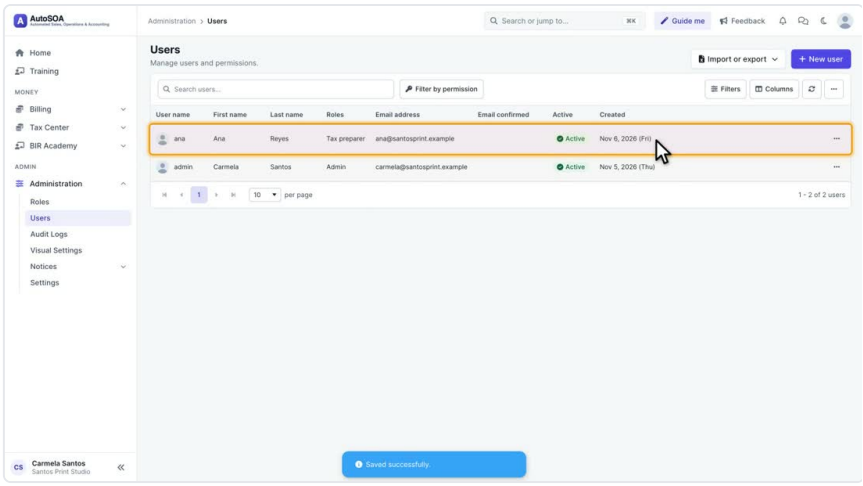
Turn off Send activation email. You tell Ana her password yourself.

Click Roles.

Turn on Tax preparer.

Turn off User. Ana needs only Tax preparer.

Click Save.



Here is Ana in your list of users, with the role Tax preparer.

You made a role that prepares returns but cannot approve them. Then you added Ana with that role. Next, you copy your BIR registration into AutoSOA.

Check yourself

▼ Why does AutoSOA ask for two people on a return?

One person prepares it, and a second person approves it. The person who prepares a return cannot approve it.

▼ Which four permissions stay with the owner?

Approve tax returns, **Record filing and payment**, **Check BIR documents** and **Verify tax rules**.

Common mistakes

- **The screen says:** You run the business alone.
  Do: You still need a second user to approve your returns, such as your bookkeeper.

Lesson 3 BIR registration

For owner · 2 min · video `tax-onboard-03.webm`

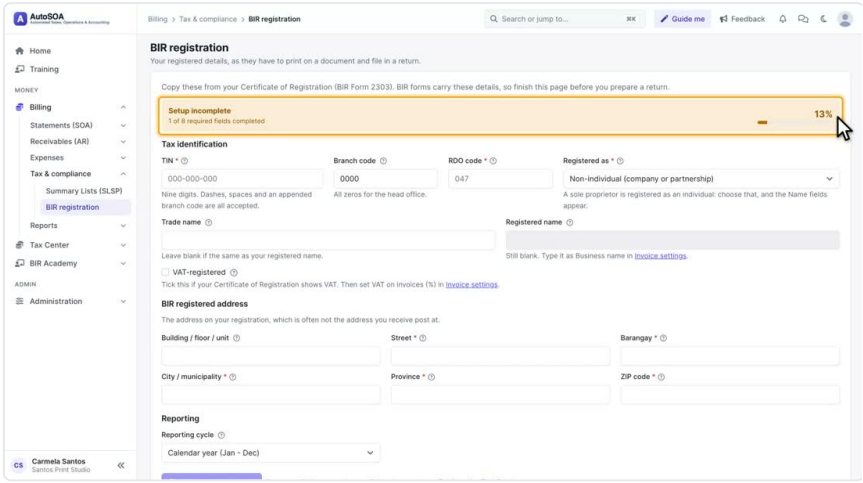
At the end you will have: the registration saved

Before you start: You need your Certificate of Registration, BIR Form 2303.

Steps

1

Open Billing, then Tax & compliance, then BIR registration.



This is BIR registration. Every return uses these details. This bar counts the required fields. Finish this page before you prepare a return.

2

Your TIN is your tax identification number. It is at the top of your 2303.

Your RDO is your Revenue District Office. The RDO code is on your 2303.

Registered as decides which name fields you must fill.

VAT-registered stays off. Santos Print Studio is not registered for VAT.

Copy the address exactly as your 2303 shows it.

Type your nine digits in TIN.

Type the branch code in Branch code. The head office has zeros.

Type 038 in RDO code.

Choose Individual in Registered as.

Type the business name in Trade name.

Type your last name in Last name.

Type your first name in First name.

Type your middle name in Middle name.

Type 118 in Building / floor / unit.

Type the street in Street.

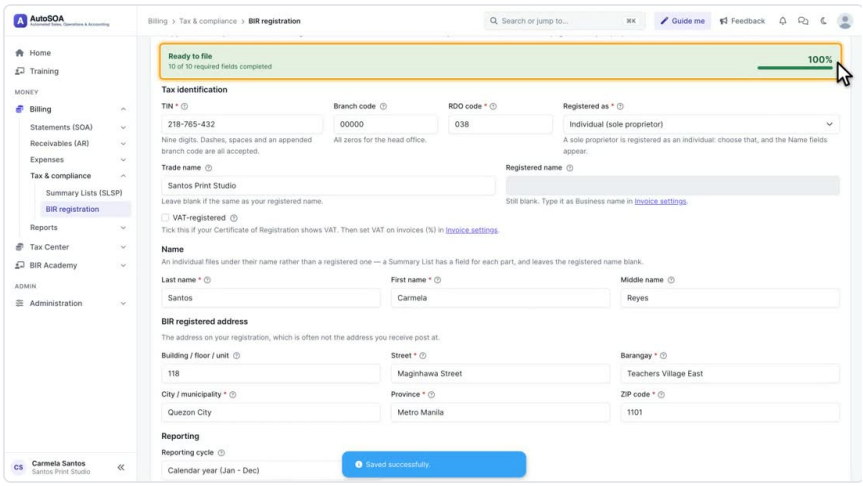
Type the barangay in Barangay.

Type the city in City / municipality.

Type the province in Province.

Type the code in ZIP code.

Click Save BIR registration.



The bar now says Ready to file.

You copied your TIN, your RDO, your name and your address from the 2303. Next, you tell AutoSOA what kind of taxpayer you are.

Check yourself

▼ Which paper do you copy the registration from?
Your Certificate of Registration, BIR Form 2303.

▼ When can you file?
When the bar on BIR registration says Ready to file.

Lesson 4 Taxpayer profile

For owner · 2 min · video `tax-onboard-04.webm`

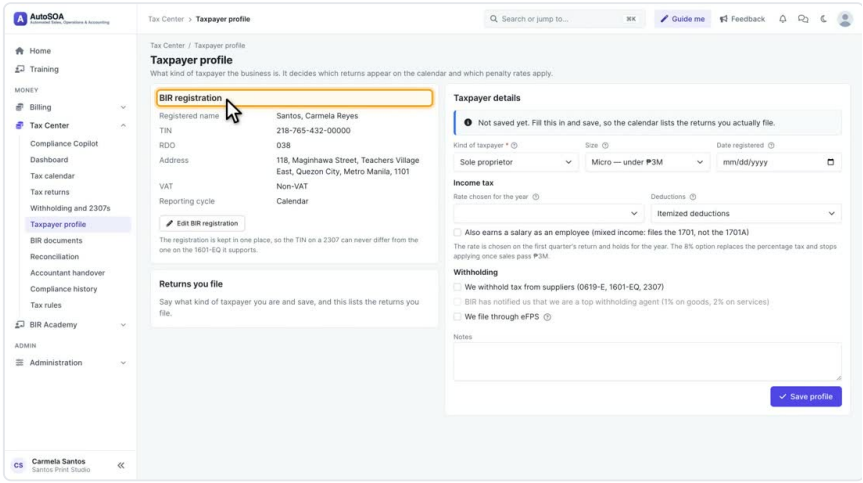
At the end you will have: the profile saved, the calendar filled

Before you start: You need the BIR registration you saved in lesson three.

Steps

1

Open Tax Center, then Taxpayer profile.



This is the Taxpayer profile. It decides which returns appear on your calendar. BIR registration shows the details you saved in lesson three.

2

Kind of taxpayer decides which forms you file.

Size decides the penalty rates. A micro taxpayer sells less than three million pesos a year.

Returns start from the date you registered.

This is your income tax choice for the year. Graduated rates also mean percentage tax on your sales. Ask your tax professional which choice suits you.

The optional standard deduction, or OSD, takes 40 percent off your sales. You keep no list of expenses for it.

We withhold tax from suppliers stays off. Santos Print Studio holds back no tax from its suppliers.

Choose Sole proprietor in Kind of taxpayer.

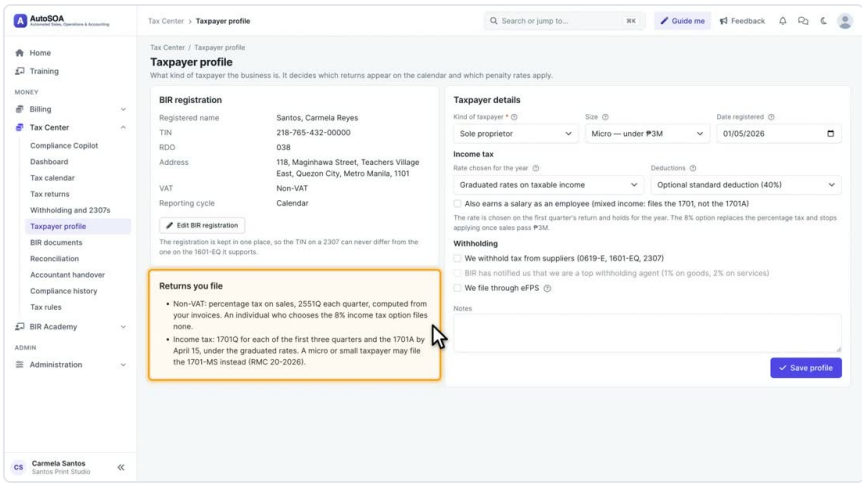
Choose Micro in Size.

Pick 5 January 2026 in Date registered.

Choose Graduated rates on taxable income in Rate chosen for the year.

Choose Optional standard deduction in Deductions.

Click Save profile.



Returns you file now lists your returns: the 2551Q for percentage tax, and the 1701Q for income tax.

You chose your kind of taxpayer, your size, your income tax choice and your deduction. Next, you put your 2303 on file.

Check yourself

▼ What does the Taxpayer profile decide?

Which returns appear on your calendar, and which penalty rates apply.

▼ Who should confirm your income tax choice?

Your tax professional. The choice holds for the whole year.

Common mistakes

- **The screen says:** Your calendar lists withholding returns you do not file.
  Do: Turn off **We withhold tax from suppliers** on the **Taxpayer profile**, then click **Save profile**.

Lesson 5 Your 2303 on file

For owner · 1 min · video `tax-onboard-05.webm`

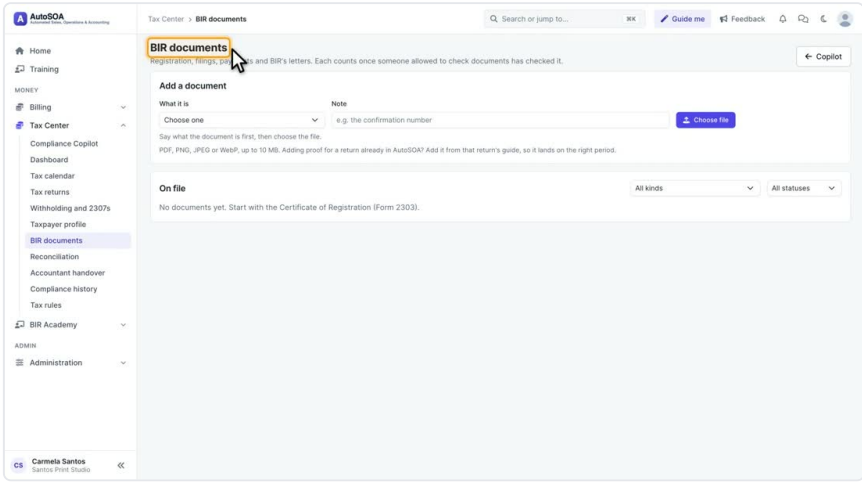
At the end you will have: the 2303 checked in BIR documents

Before you start: You need a scan or a photo of your 2303.

Steps

1

Open Tax Center, then BIR documents.



This is BIR documents. It keeps your papers from BIR. A paper counts only after a person checks it.

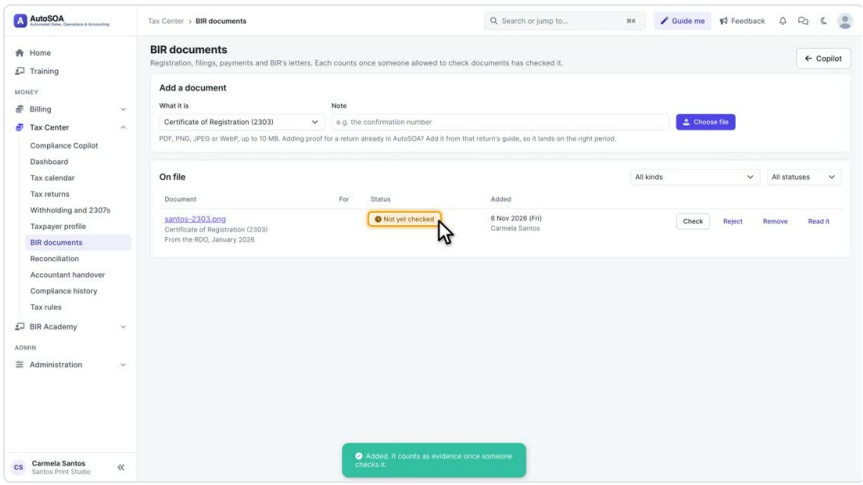
2

Add a document is where each paper comes in.

Choose Certificate of Registration in What it is.

Type where it came from in Note.

Click Choose file, and pick your scan.

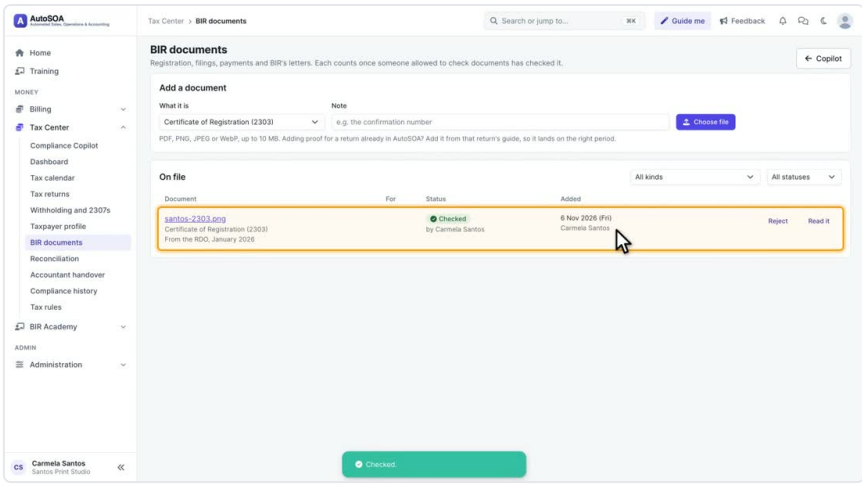


The document is on file. Its status says it is not checked yet.

3

Compare the file with your paper. If they match, check it.

Click Check.



Here is your 2303, and it says Checked.

You added your 2303, and you checked it. Next, you answer the questions AutoSOA asks about your registration.

Check yourself

▼ When does a paper count as proof?

Only after a person checks it.

Lesson 6 What BIR has on record

For owner · 3 min · video `tax-onboard-06.webm`

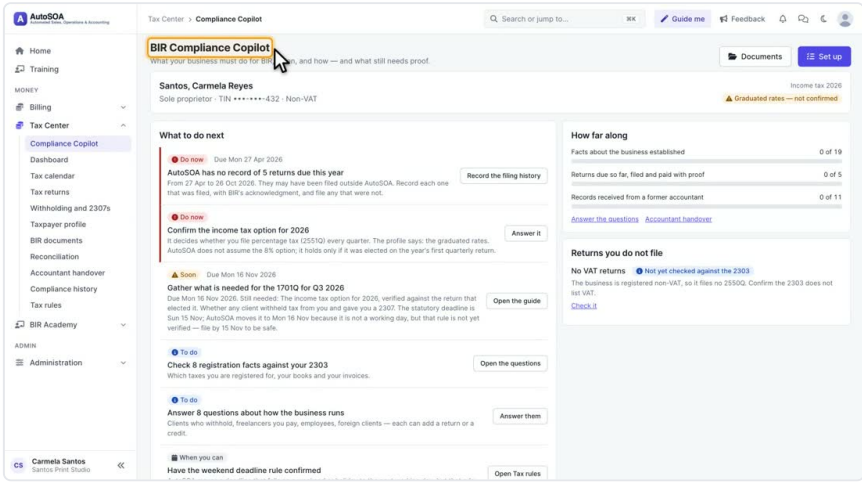
At the end you will have: registration and income tax answers checked

Before you start: You need the 2303 you checked in lesson five.

Steps

1

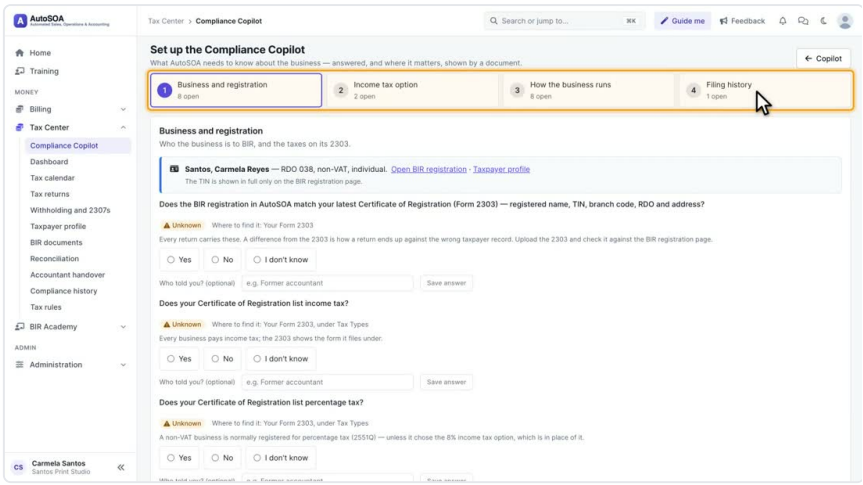
Open Tax Center, then Compliance Copilot.



The Copilot asks what it cannot find in your records.

2

Click Set up.



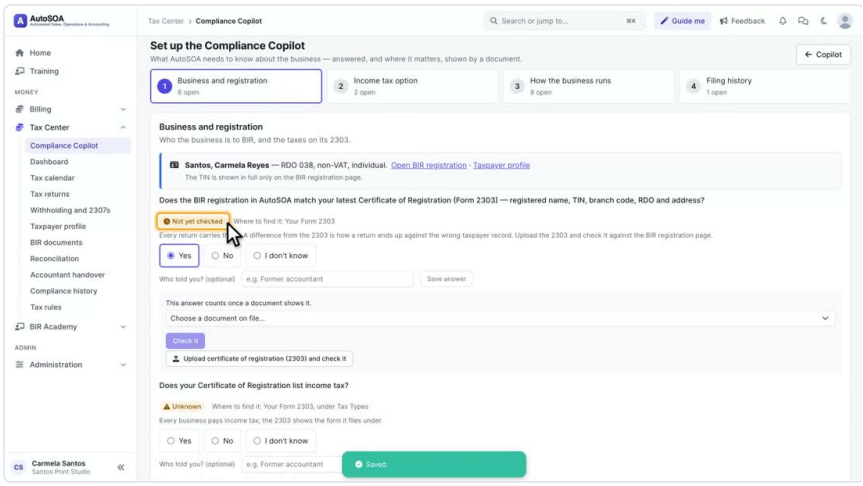
There are four steps. You do the first two in this lesson.

3

The first question asks if your registration in AutoSOA matches your 2303.

Choose Yes.

Click Save answer.



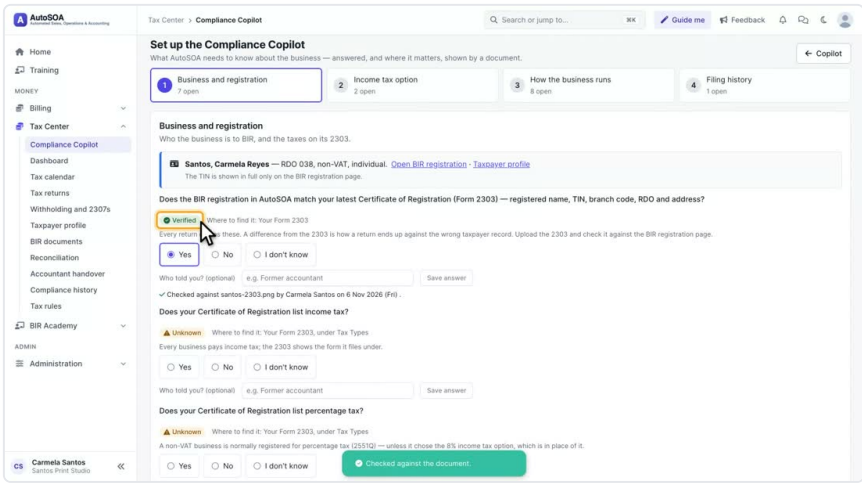
Your answer is saved. It says Not yet checked. So far it is only your word.

4

An answer counts when a document shows it.

Choose your 2303 in the list of documents.

Click Check it.



The answer now says Verified.

5

The next five questions ask which taxes your 2303 lists. Answer each one, and check it against the 2303.

Income tax is on the 2303.

Percentage tax is on the 2303.

Value-added tax is not.

Expanded withholding tax is not.

Withholding tax on compensation is not.

The next two questions need other papers. Answer them now, and check them when you have the papers.

Your books are registered.

Your invoices are authorized.

Choose Yes.

Click Save answer.

Choose your 2303 in the list of documents.

Click Check it.

Choose Yes.

Click Save answer.

Choose your 2303 in the list of documents.

Click Check it.

Choose No.

Click Save answer.

Choose your 2303 in the list of documents.

Click Check it.

Choose No.

Click Save answer.

Choose your 2303 in the list of documents.

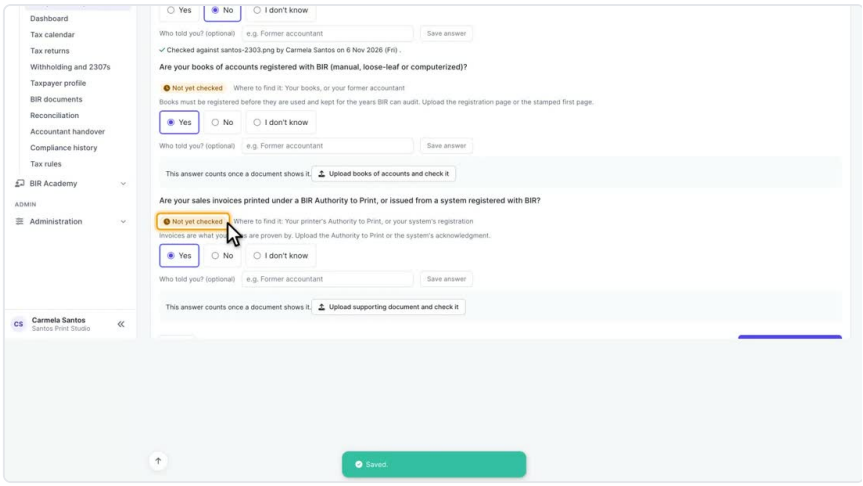
Click Check it.

Choose Yes.

Click Save answer.

Choose Yes.

Click Save answer.



These two stay Not yet checked until you add the papers.

6

This question asks for the choice you made on your first return of the year.

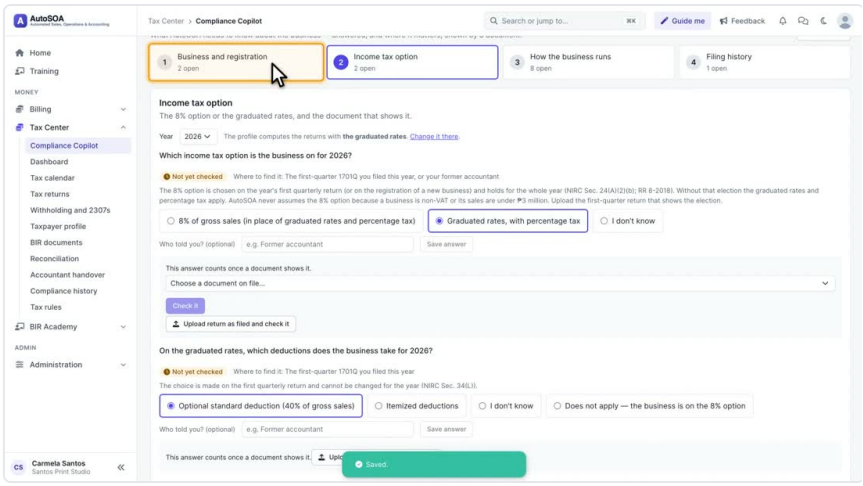
Click Next: Income tax option.

Choose Graduated rates, with percentage tax.

Click Save answer.

Choose Optional standard deduction.

Click Save answer.



The first step shows two answers still open. They wait for their papers.

You answered from your 2303. You checked each answer against it. Then you gave your income tax choice. Next, you answer how your business runs.

Check yourself

▼ What is the difference between Not yet checked and Verified?

Not yet checked is your word. **Verified** means a document on file shows the answer.

▼ Why are two answers still open after this lesson?

They wait for their papers: your books and your invoice authority.

Lesson 7 How the business runs

For owner · 2 min · video `tax-onboard-07.webm`

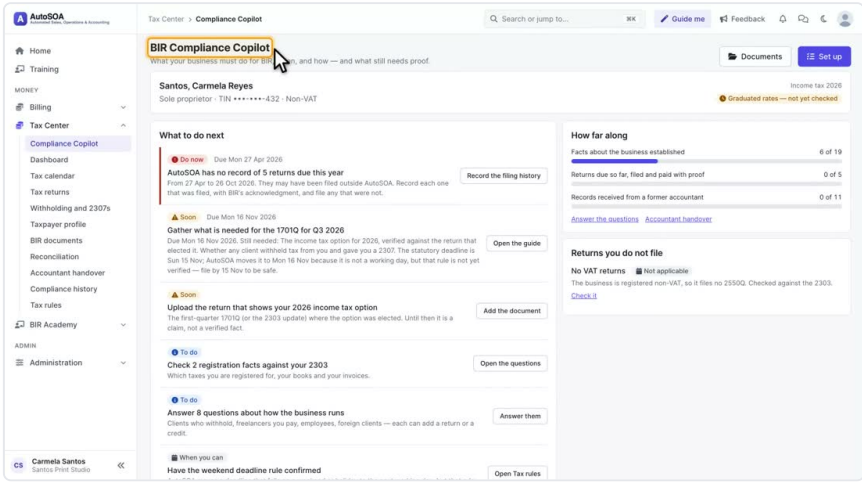
At the end you will have: operations and history answered

Before you start: You need the answers you saved in lesson six.

Steps

1

Open Tax Center, then Compliance Copilot.



Your answers so far are saved here.

2

These answers decide which returns and warnings you see.

You issue an invoice for every sale.

You have no clients abroad.

Some customers keep back part of what they pay you. They give you a BIR Form 2307 for it. Each 2307 is a credit against your income tax.

You have no employees.

You pay no freelancers.

You pay no rent.

You know of no open matter with BIR.

Carmela is taking over from her bookkeeper, Marites.

Ask your former bookkeeper for the last period she filed.

Click Set up.

Click How the business runs.

Choose Yes.

Click Save answer.

Choose No.

Click Save answer.

Choose Yes.

Click Save answer.

Choose No.

Click Save answer.

Choose No.

Click Save answer.

Choose No.

Click Save answer.

Choose We used one and are taking it over ourselves.

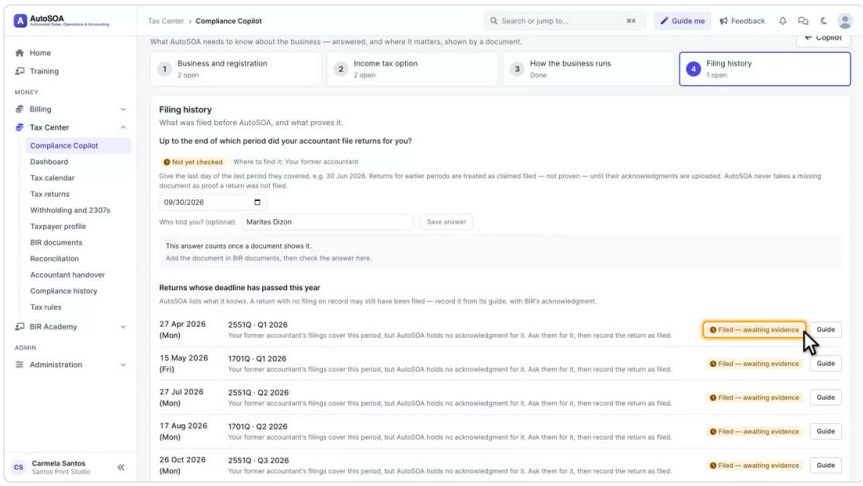
Click Save answer.

Click Next: Filing history.

Pick 30 September 2026 in the date box.

Type her name in Who told you?

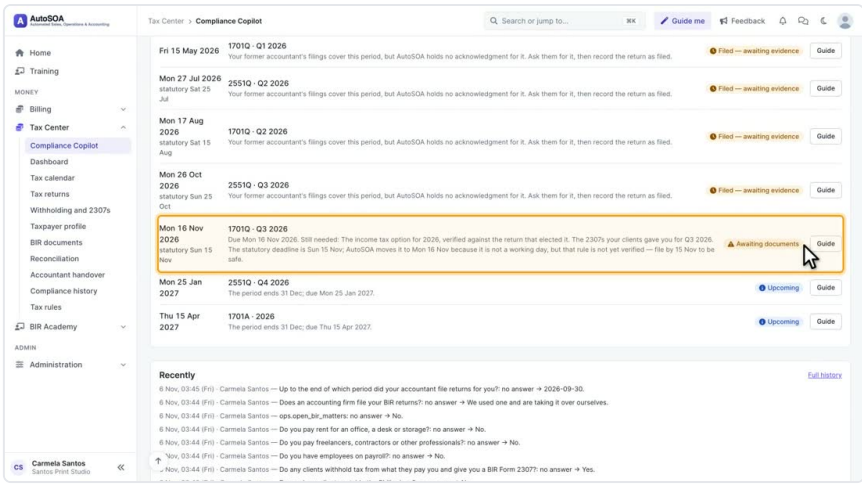
Click Save answer.



Returns she says she filed now say Filed, awaiting evidence. That is a claim, not proof.

3

Click Done, back to the copilot.



The third-quarter 1701Q is still on your list. Its deadline is ahead, so nobody has filed it yet.

You answered eight questions about your business. You saved the date your bookkeeper filed up to. Next, you list what to get from your bookkeeper.

Check yourself

▼ What happens when you say your bookkeeper filed up to 30 September?

Returns with a passed deadline say **Filed, awaiting evidence**. That is a claim, not proof.

▼ Does her answer hide a deadline that is still ahead?

No. A return due later stays on your list.

Lesson 8 Taking over from your bookkeeper

For owner · 1 min · video `tax-onboard-08.webm`

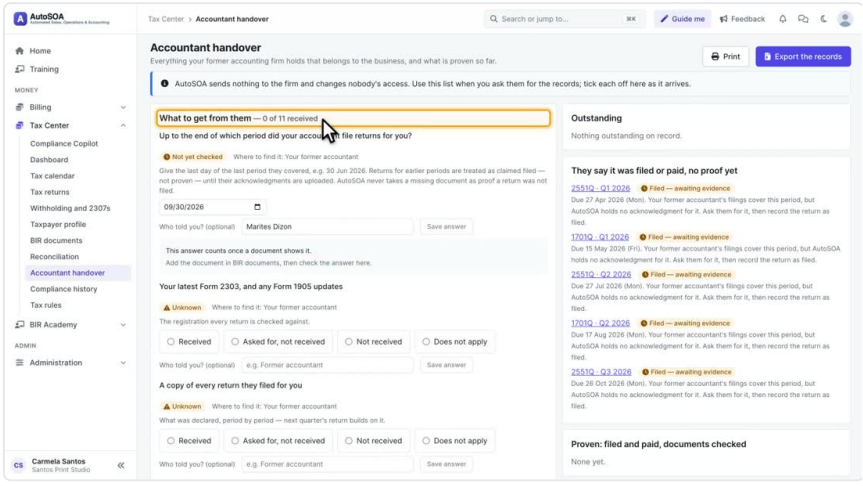
At the end you will have: the handover list started

Before you start: You need your answers from lesson seven.

Steps

1

Open Tax Center, then Accountant handover.



This is the Accountant handover. It lists everything your former bookkeeper holds for your business. AutoSOA sends nothing to her. You use this list when you ask. What to get from them is the list.

2

You have your 2303 already.

The next three are what you must ask for today: the returns, the acknowledgments and the proofs of payment.

Choose Received.

Click Save answer.

Choose Asked for, not received.

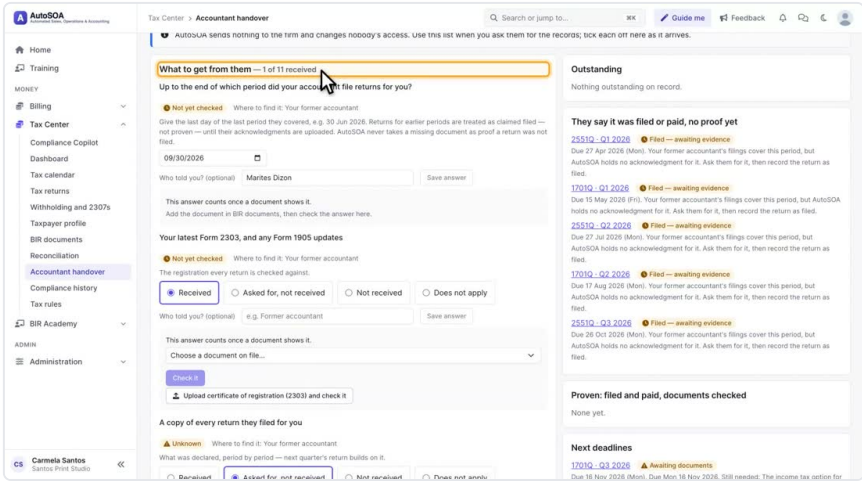
Click Save answer.

Choose Asked for, not received.

Click Save answer.

Choose Asked for, not received.

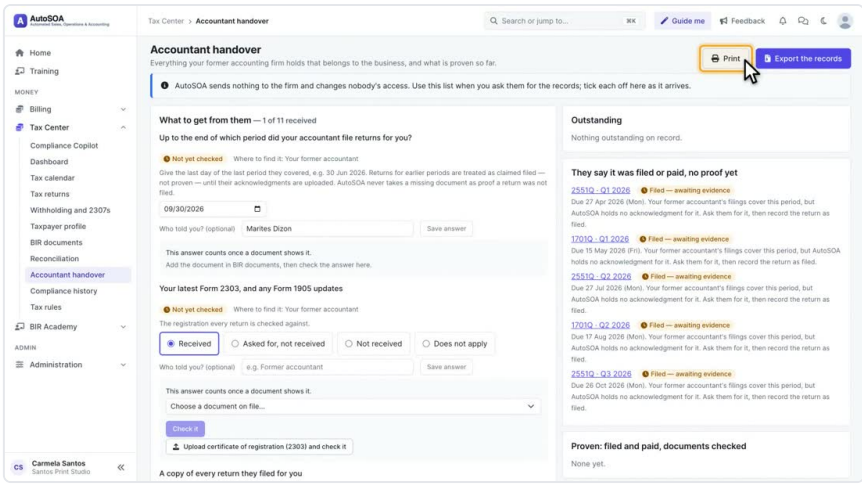
Click Save answer.



This panel lists what she says she filed and nobody has proved. One item is received, and you asked for three.

3

Click Print to make a paper copy, and take it to her.



You marked what you have, and what you asked for. Next, you check a rule that AutoSOA cannot decide for you.

Check yourself

▼ Does AutoSOA contact your bookkeeper?

No. It sends nothing. You use the list when you ask her.

Lesson 9 A rule that needs you

For owner · 1 min · video `tax-onboard-09.webm`

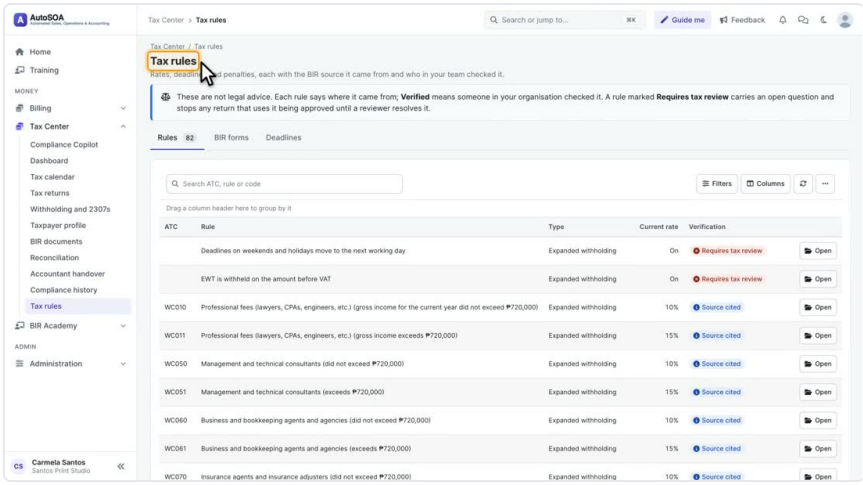
At the end you will have: the weekend rule checked
Before you start: You need the rules you loaded in lesson one.

Your 1701Q falls due on a Sunday this quarter. A rule moves that deadline to Monday. AutoSOA has only secondary sources for that rule, so no return can be approved until a person checks it.

Steps

1

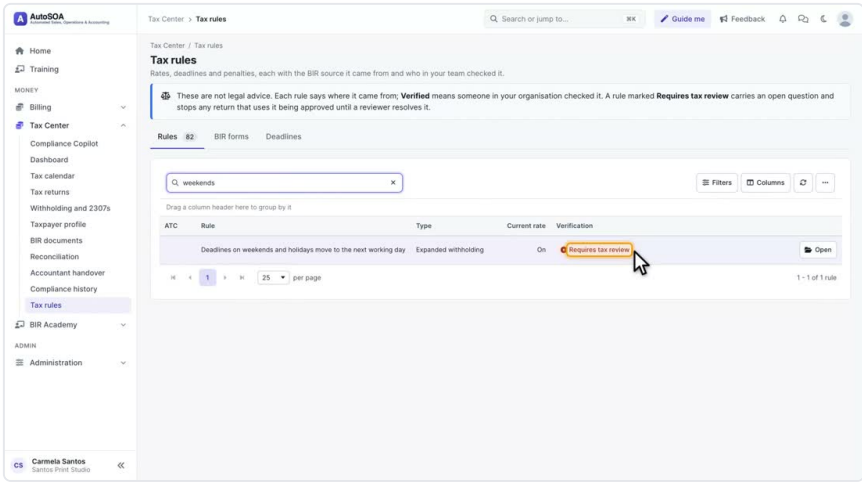
Open Tax Center, then Tax rules.



Most rules cite the law. One rule needs a person.

2

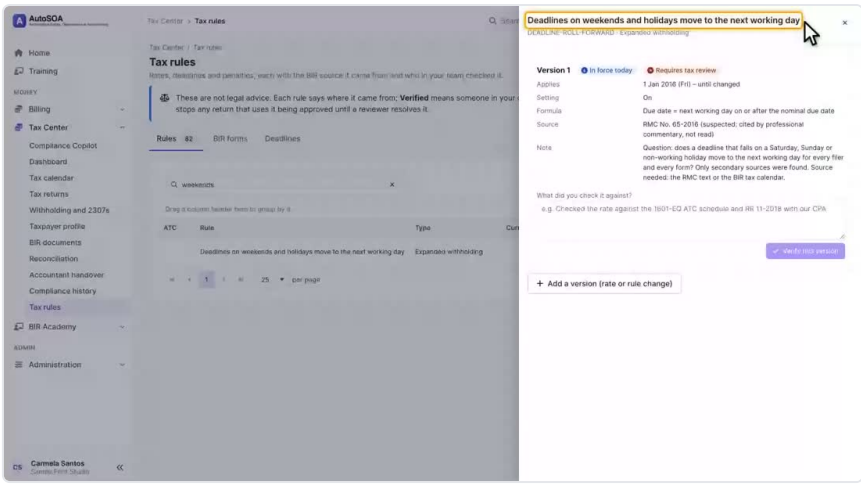
Find “"weekends"” in the search box.



Its status says it requires tax review.

3

Click Open.



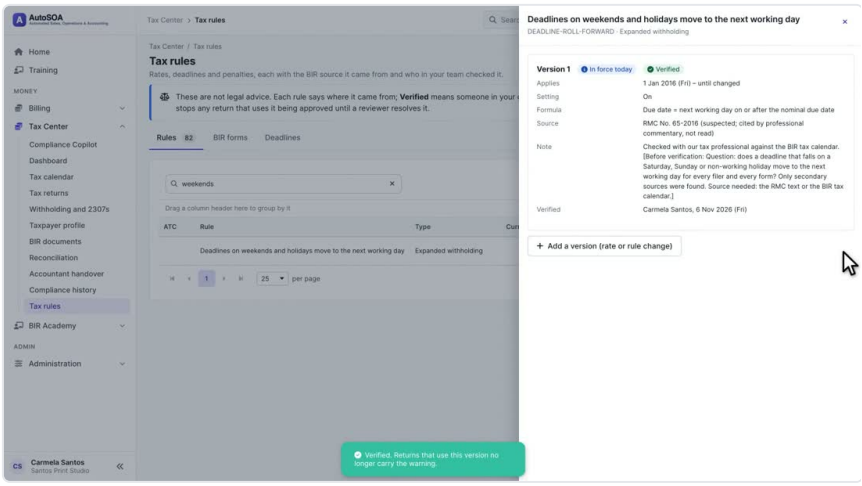
The rule opens, with its source.

4

Ask your tax professional first. Then write down what you checked it against.

Type what you checked in the box.

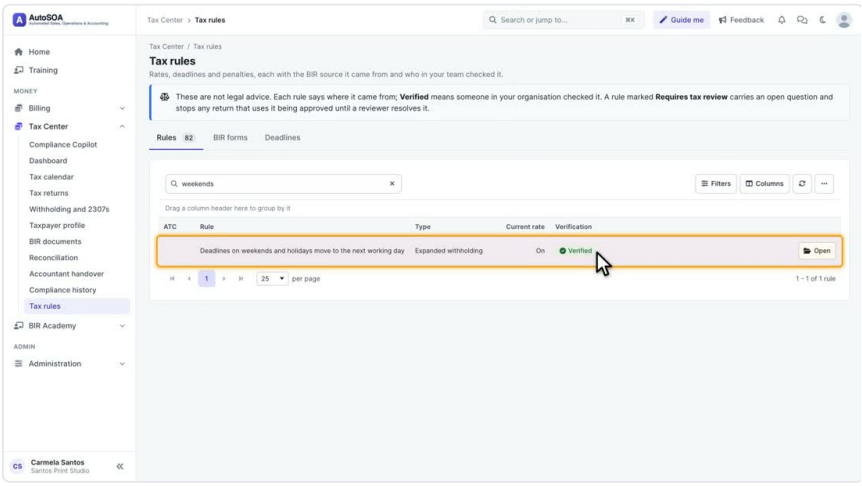
Click Verify this version.



A message says the rule is verified.

5

Close the panel.



The rule now says Verified.

You found the rule that needs a person. You recorded what you checked it against. Next, you find your next deadline on the calendar.

Check yourself

▼ Why must a person check this rule?

AutoSOA has only secondary sources for it, and no return can be approved until a person checks it.

▼ What do you write in the box?

What you checked the rule against, after you ask your tax professional.

Lesson 10 Reading the calendar

For owner · 2 min · video `tax-onboard-10.webm`

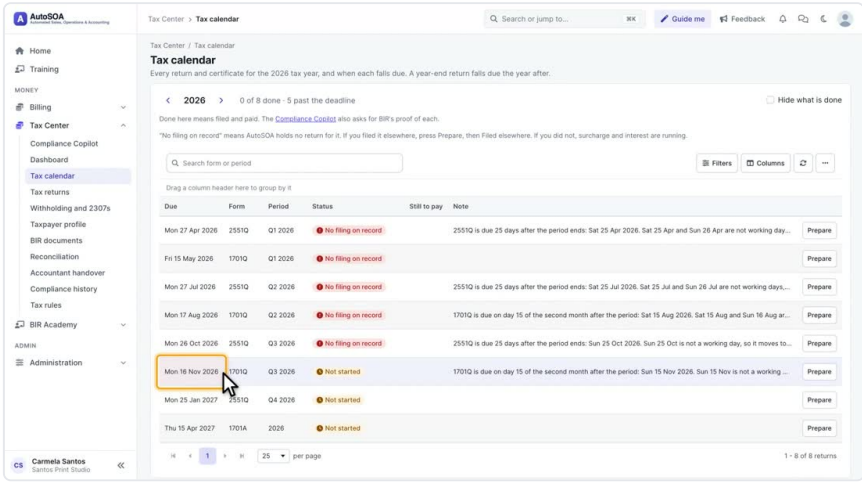
At the end you will have: the next deadline found

Before you start: You need the profile you saved in lesson four.

Steps

1

Open Tax Center, then Tax calendar.

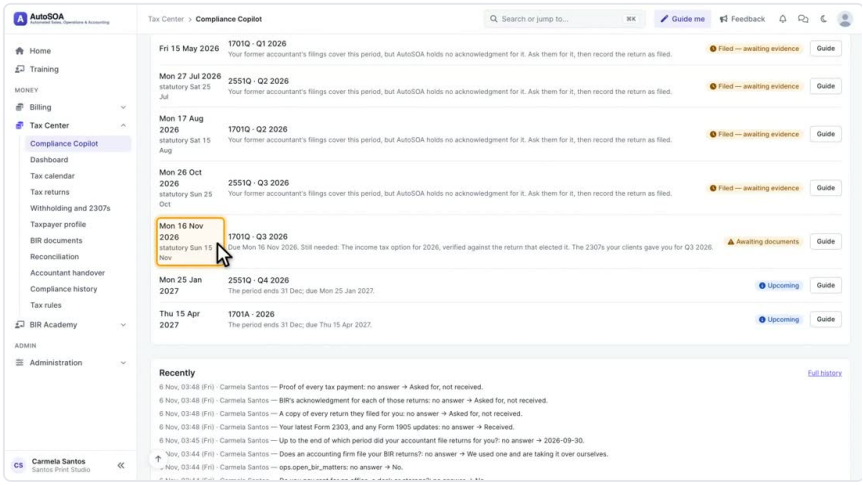


This is the Tax calendar. It lists each return your profile makes you file this year. Each row is one return. No filing on record means AutoSOA holds no return for it yet. You add them in lesson eleven. Your next return is the 1701Q for the third quarter. It is due on Monday, 16 November.

2

The Compliance Copilot shows the same returns, with more help.

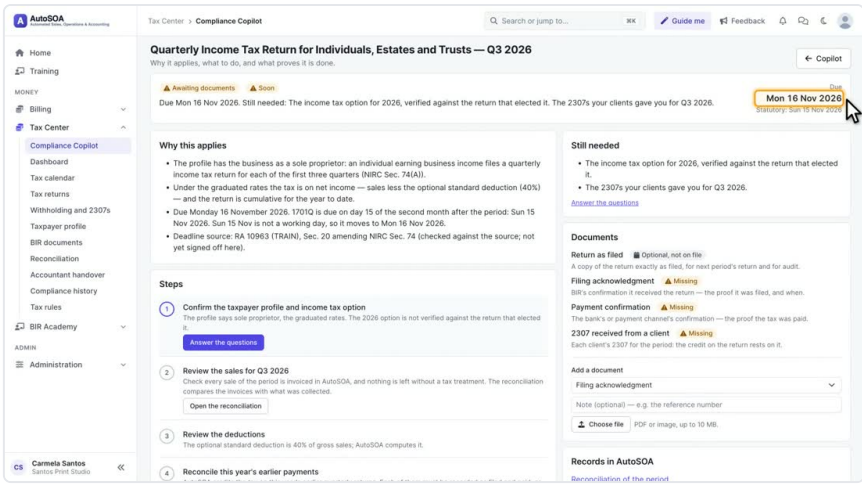
Open Tax Center, then Compliance Copilot.



This is the Compliance Copilot. It shows what your bookkeeper says she filed. This row shows two dates. The law says Sunday the 15th. The rule you checked moves it to Monday. When you can, file by the earlier date.

3

Click Guide.



Each return has a guide. It starts with why the return applies to you. Steps shows what to do, in order. The next step is marked. Filing it with BIR says how to file and pay. AutoSOA prepares and tracks. It does not file for you. Here is your next deadline: Monday, 16 November 2026.

You looked at the calendar. You saw how a deadline moves off a Sunday. You opened a guide. Next, you record the returns your bookkeeper filed.

Check yourself

▼ Why does a return show two dates?

The law gives the first date. The rule moves a Saturday, Sunday or holiday to the next working day. When you can, file by the earlier date.

Lesson 11 What your bookkeeper filed

For owner · 4 min · video `tax-onboard-11.webm`

At the end you will have: Q1 and Q2 1701Q on record, with proof

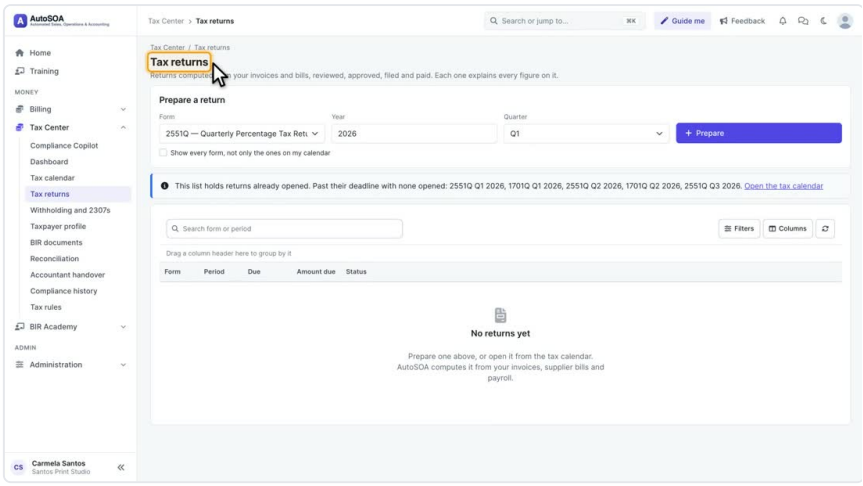
Before you start: You need the papers from your bookkeeper, and the 2303 work from lesson five.

Your next 1701Q takes off what you paid in earlier quarters. So those returns must be on record.

Steps

1

Open Tax Center, then Tax returns.



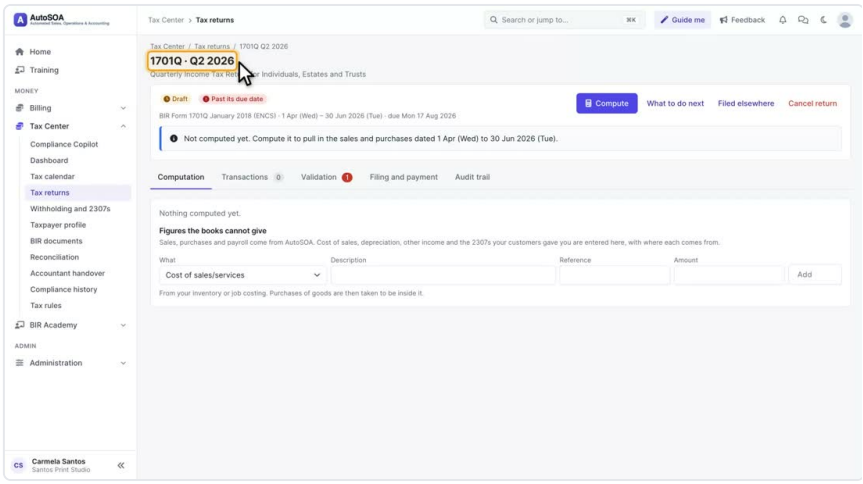
This is Tax returns. It lists each return in AutoSOA. It is empty today.

2

Choose 1701Q in Form.

Choose the second quarter in Quarter.

Click Prepare.



The return opens. Your bookkeeper filed this one, so you do not compute it.

3

She paid it too.

Click Filed elsewhere.

Pick 14 August 2026 in Filed on.

Choose eBIRForms, paid at an authorized agent bank, in Filed through.

Type 5,700 in Tax due on the return as filed.

Type the reference number from the acknowledgment.

Click Record filing.

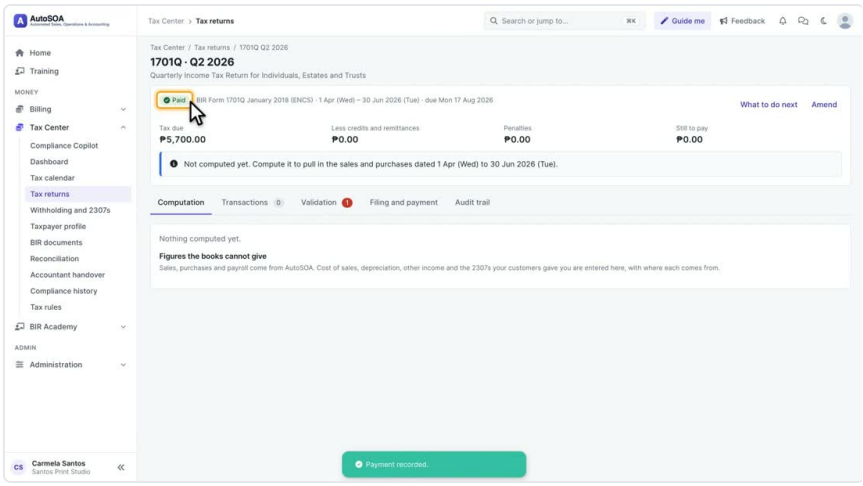
Click Record payment.

Pick 14 August 2026 in Paid on.

Type 5,700 in Tax.

Type the bank reference.

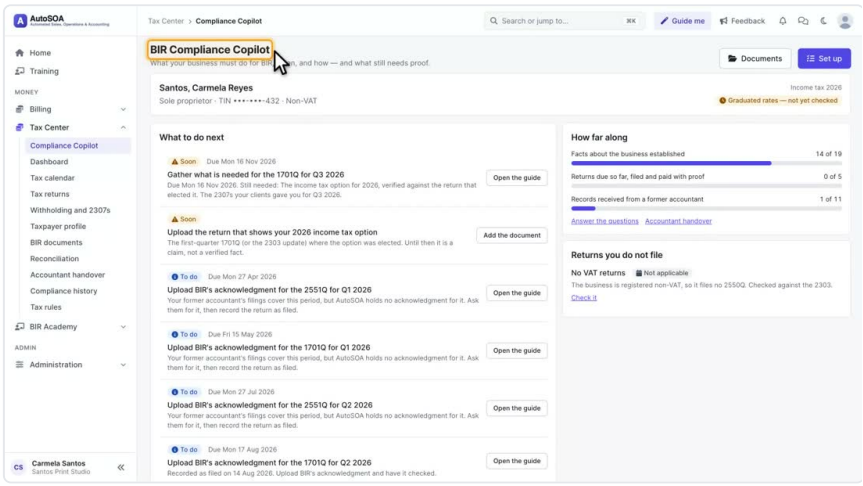
Click Record payment.



The return is paid. AutoSOA still needs the proof.

4

Open Tax Center, then Compliance Copilot.

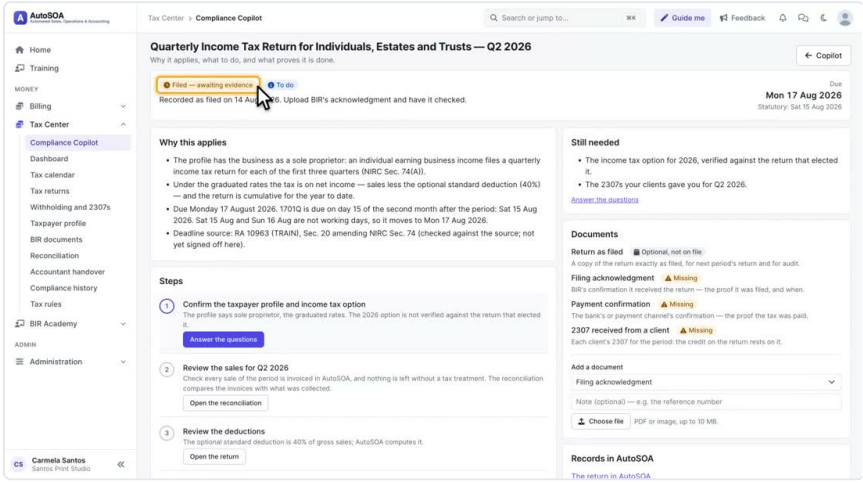


Each return has its guide here.

5

Find the second-quarter 1701Q under Returns for 2026.

Click Guide.



The status says the filing still needs evidence.

6

Compare it with the return.

Choose Filing acknowledgment in Add a document.

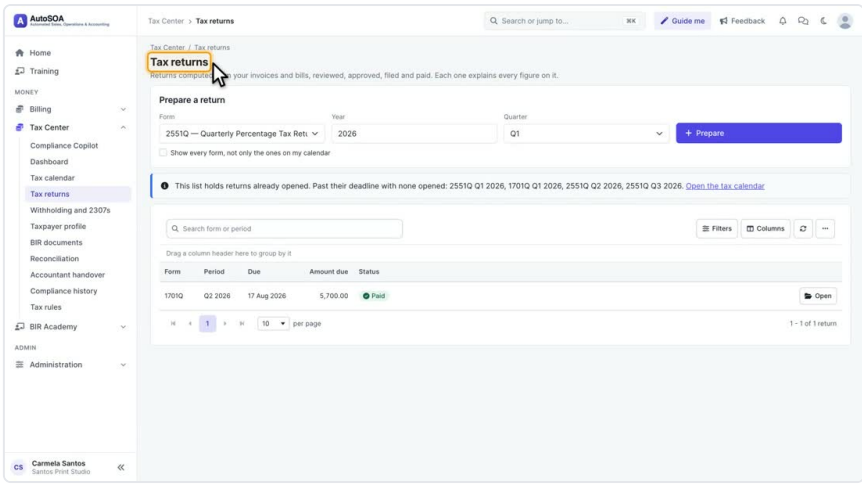
Click Choose file, and pick the acknowledgment.

Click It says what it should.

Choose Payment confirmation in Add a document.

Click Choose file, and pick the confirmation.

Click It says what it should.



Now the status says Filed and paid. Now the first quarter. Open Tax Center, then Tax returns. You had no sales in the first quarter, and no tax to pay.

7

Choose 1701Q in Form.

Choose the first quarter in Quarter.

Click Prepare.

Click Filed elsewhere.

Pick 14 May 2026 in Filed on.

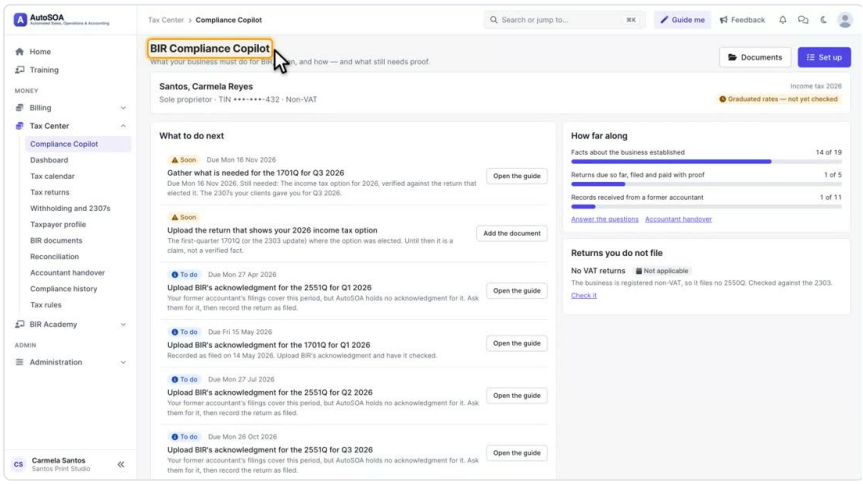
Choose eBIRForms, paid at an authorized agent bank, in Filed through.

Type 0 in Tax due on the return as filed.

Type the reference number.

Click Record filing.

Open Tax Center, then Compliance Copilot.



One paper proves this return.

8

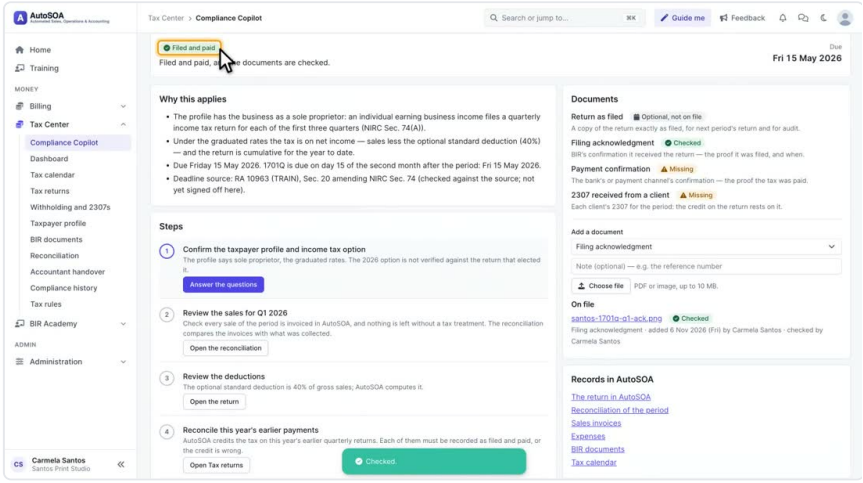
Find the first-quarter 1701Q under Returns for 2026.

Click Guide.

Choose Filing acknowledgment in Add a document.

Click Choose file, and pick the acknowledgment.

Click It says what it should.



This return says Filed and paid too.

You recorded two returns as filed elsewhere. You added the proof, and you checked it. Next, you look at your sales for the quarter.

Check yourself

▼ Why record returns your bookkeeper filed?

Your next 1701Q takes off what you paid in earlier quarters.

▼ Which button records a return filed outside AutoSOA?

Filed elsewhere, on the return.

Lesson 12 Your sales

For owner · 1 min · video `tax-onboard-12.webm`

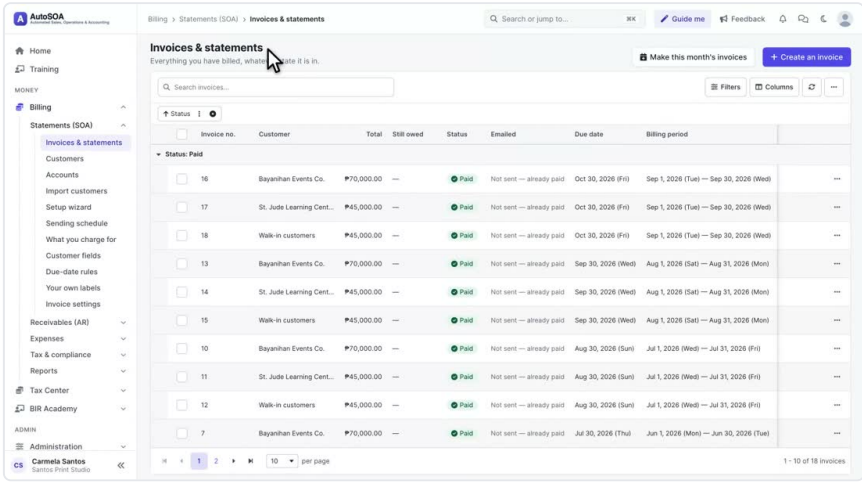
At the end you will have: Q3 sales checked

Before you start: You need your invoices in Billing. The Billing course teaches them.

Steps

1

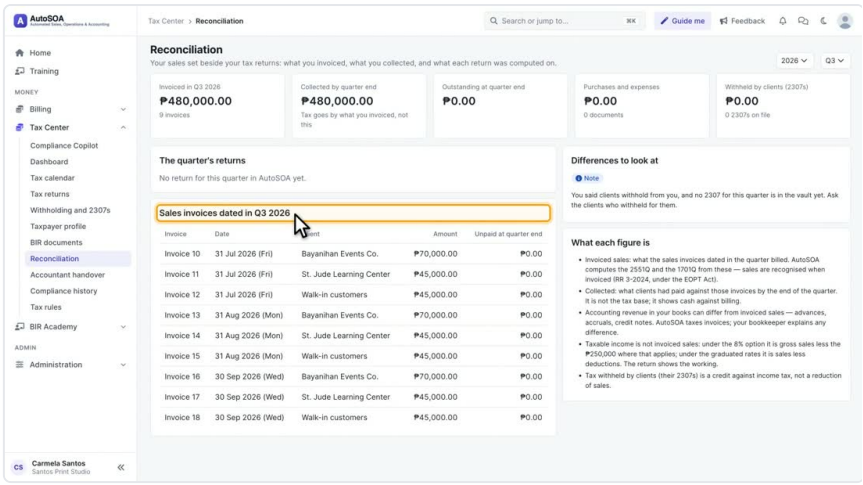
Open Billing, then Statements (SOA), then Invoices & statements.



These are your invoices from Billing. We made these invoices before this video, for April to September. Your own invoices take their place.

2

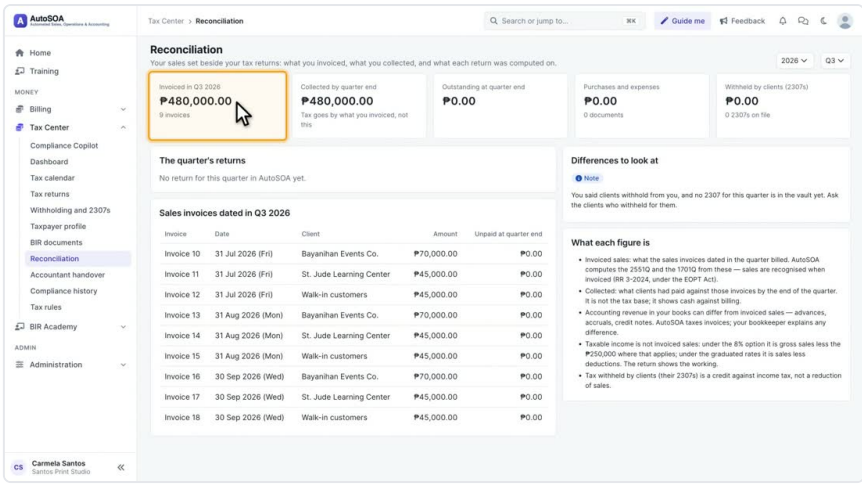
Open Tax Center, then Reconciliation.



This is Reconciliation. It sets your invoices beside your returns. It opens on the last quarter that ended. You invoiced ₱480,000 in the third quarter. You collected all of it by the end of the quarter. The invoices behind that figure are listed here.

3

If an invoice is missing here, your return will be short. Fix it in Billing first.



Your third-quarter sales are ₱480,000.

You saw your invoices. You checked the quarter in Reconciliation. Next, Ana prepares the 1701Q.

Check yourself

▼ What do you do if an invoice is missing?

Fix it in Billing first, then prepare the return.

Lesson 13 **Prepare the 1701Q**

For staff · 2 min · video `tax-onboard-13.webm`

At the end you will have: the Q3 1701Q computed

Before you start: You need the sales from lesson twelve, and the earlier returns from lesson eleven.

This happens every quarter, after the quarter ends. The preparer does it.

Steps

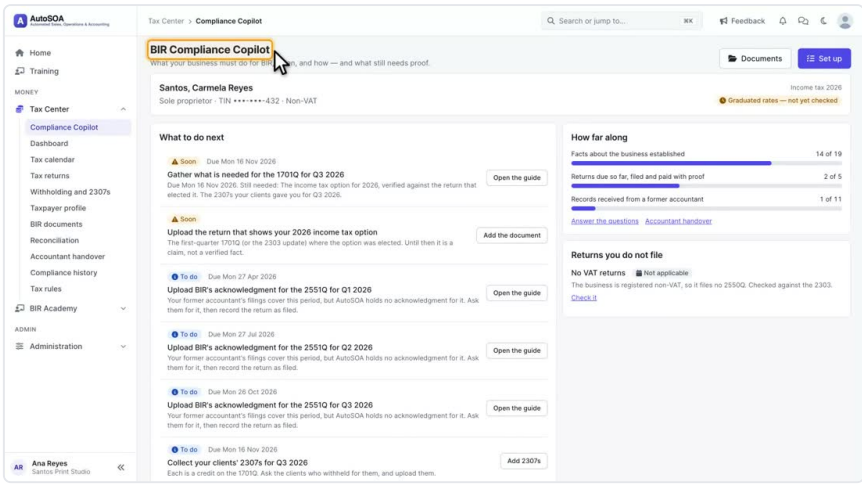
1

Click your picture.

Click Logout.

Ana signs in with her user name and password.

Open Tax Center, then Compliance Copilot.



Ana sees the same list as Carmela.

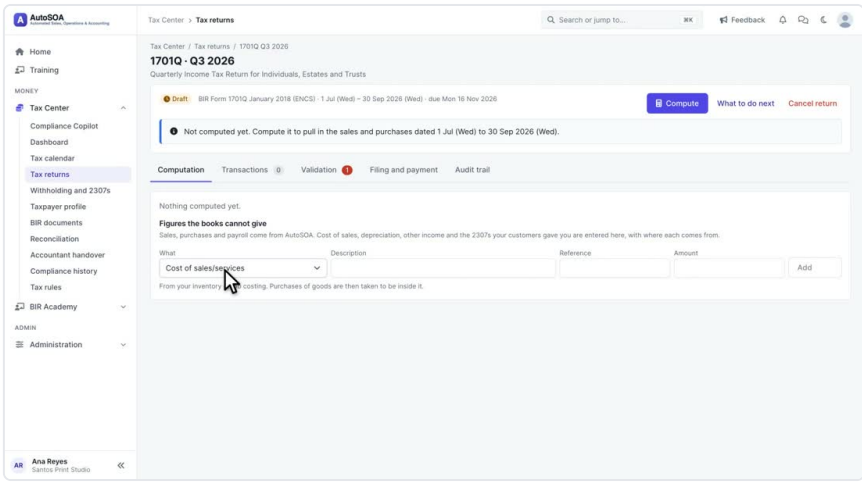
2

Compute the return in AutoSOA is the step for Ana. The steps above it are done or do not stop her.

Find the third-quarter 1701Q under Returns for 2026.

Click Guide.

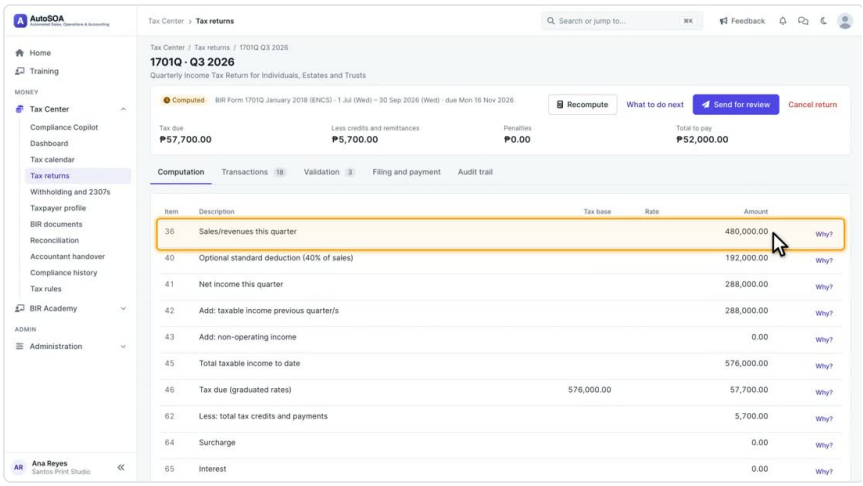
Click Prepare it.



The return opens. It has no figures yet.

3

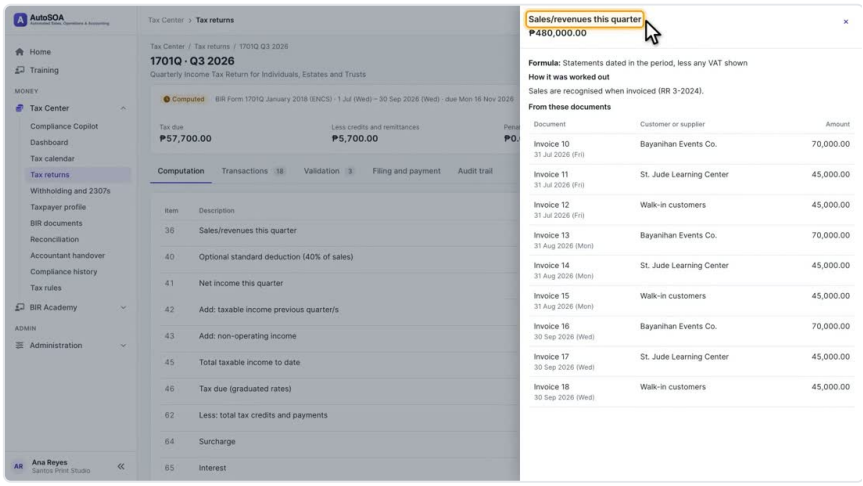
Click Compute.



Tax due is ₱57,700, for the year so far. Less credits and remittances is ₱5,700. That is what you paid for the second quarter. The total to pay is ₱52,000. This line is your sales for the quarter: ₱480,000.

4

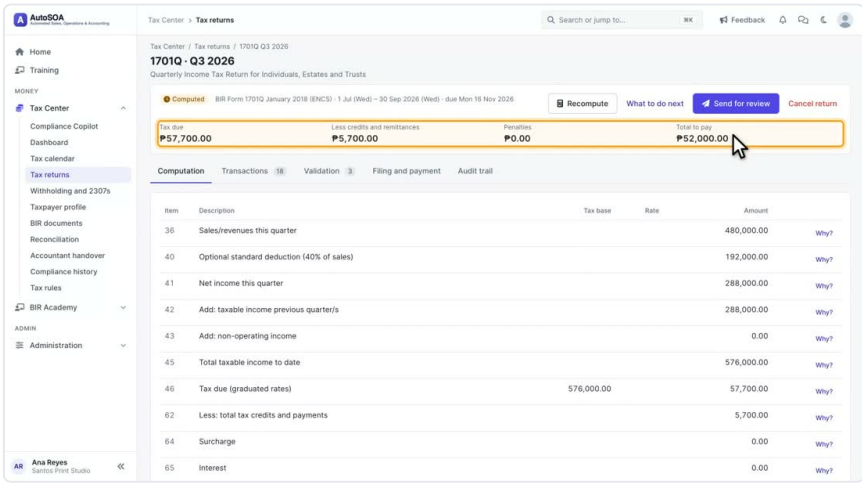
Click Why? on this line.



This panel shows how AutoSOA got the figure, and from which invoices.

5

Close the panel.



Here is your working copy. It is not a filed return yet.

Ana prepared the return. AutoSOA computed it from your invoices and your earlier returns. Next, Ana enters a credit from a customer.

Check yourself

▼ How do you see where a figure came from?

Click **Why?** on its line.

▼ Is this working copy a filed return?

No. It is for preparation and review.

Lesson 14 A customer's 2307

For staff · 1 min · video `tax-onboard-14.webm`

At the end you will have: the credit entered

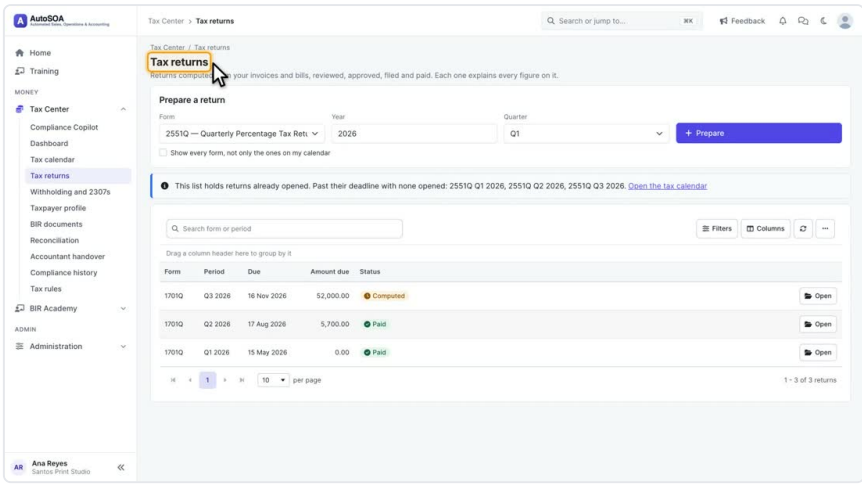
Before you start: You need the 1701Q from lesson thirteen, and the 2307 from your customer.

Bayanihan Events kept back ₱4,200 from what it paid you. That amount counts as tax you already paid.

Steps

1

Open Tax Center, then Tax returns.



This is Tax returns.

2

Figures the books cannot give is where you type what is not in your records.

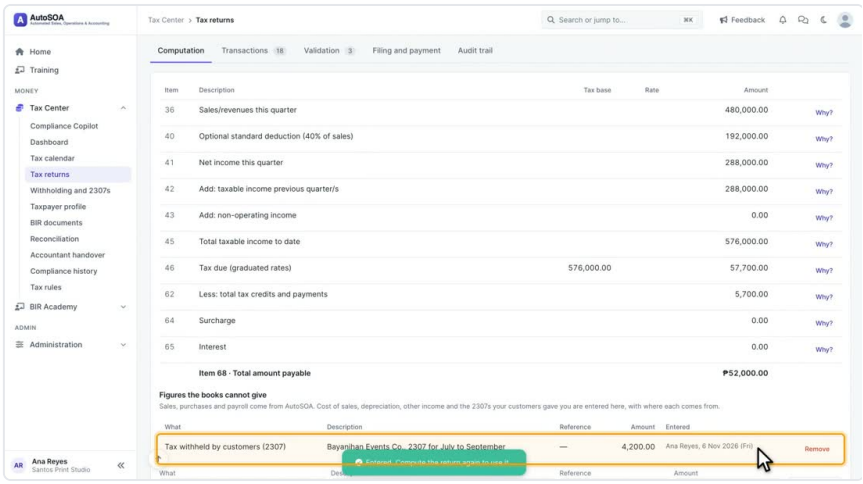
Click Open on the third-quarter 1701Q.

Choose Tax withheld by customers (2307) in What.

Type who gave the 2307 in Description.

Type 4,200 in Amount.

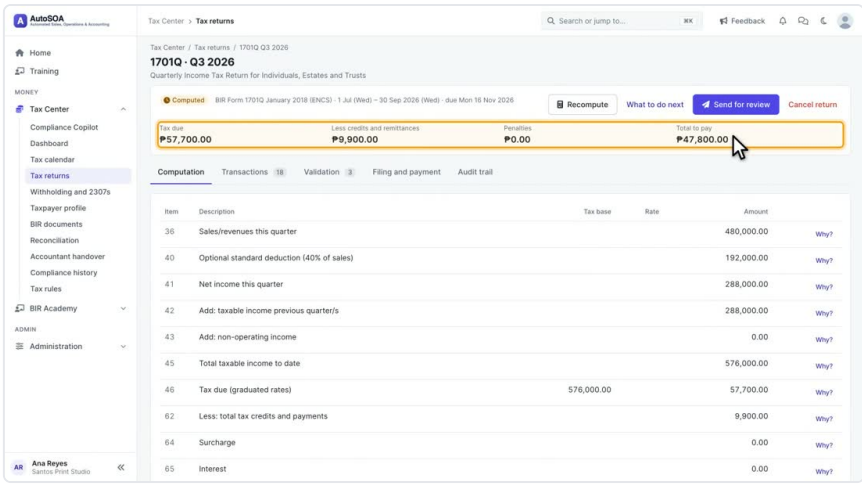
Click Add.



The credit is on the return.

3

Click Recompute.



Credits are ₱9,900 now, and the total to pay is ₱47,800.

Ana entered the 2307, and computed the return again. Next, Ana sends the return to Carmela, and Carmela approves it.

Check yourself

▼ Where do you enter a 2307?

On the return, in **Figures the books cannot give**. Choose **Tax withheld by customers (2307)**.

Common mistakes

- **The screen says:** The total did not change after you added the credit.
  Do: Click **Recompute**.

Lesson 15 Review and approve

For staff, owner · 2 min · video `tax-onboard-15.webm`

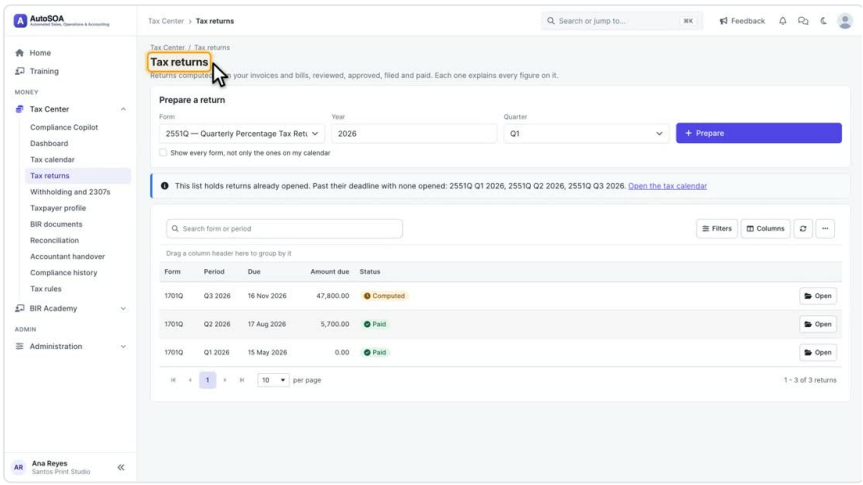
At the end you will have: the 1701Q approved

Before you start: You need the return from lesson fourteen, and the role from lesson two.

Steps

1

Ana opens Tax Center, then Tax returns.



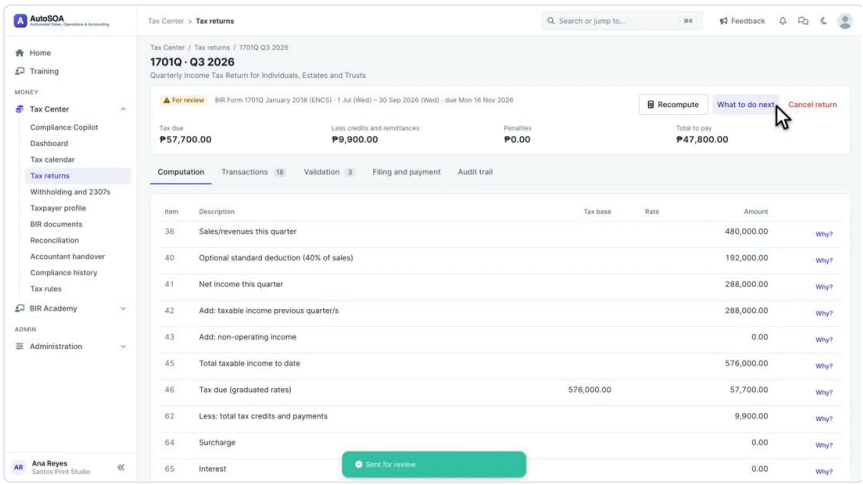
This is Tax returns.

2

Ana has finished. Send for review passes the return to Carmela.

Click Open on the third-quarter 1701Q.

Click Send for review.



Ana has no Approve button. The person who prepares a return never approves it.

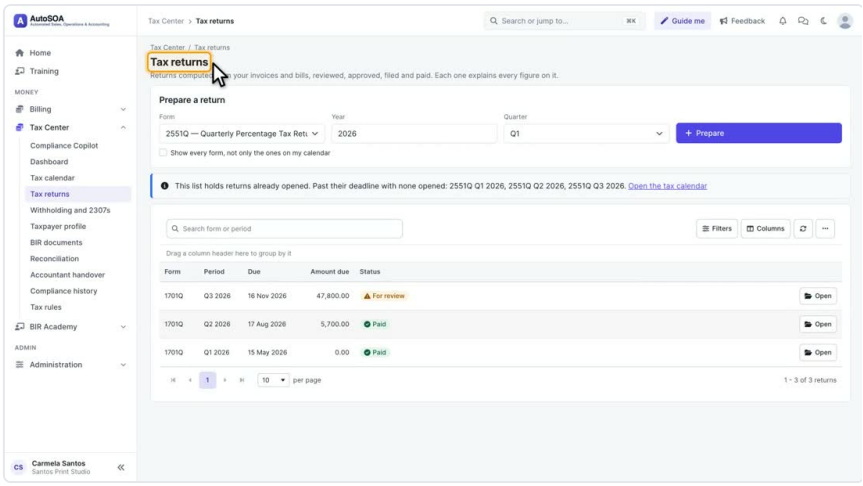
3

Click your picture.

Click Logout.

Carmela signs in with her user name and password.

Open Tax Center, then Tax returns.



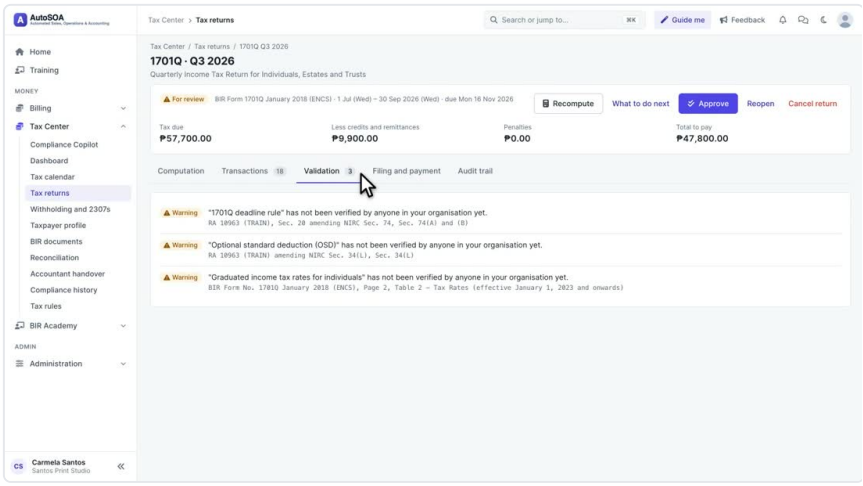
This is Tax returns.

4

Read the figures first. You are the second pair of eyes.

Click Open on the third-quarter 1701Q.

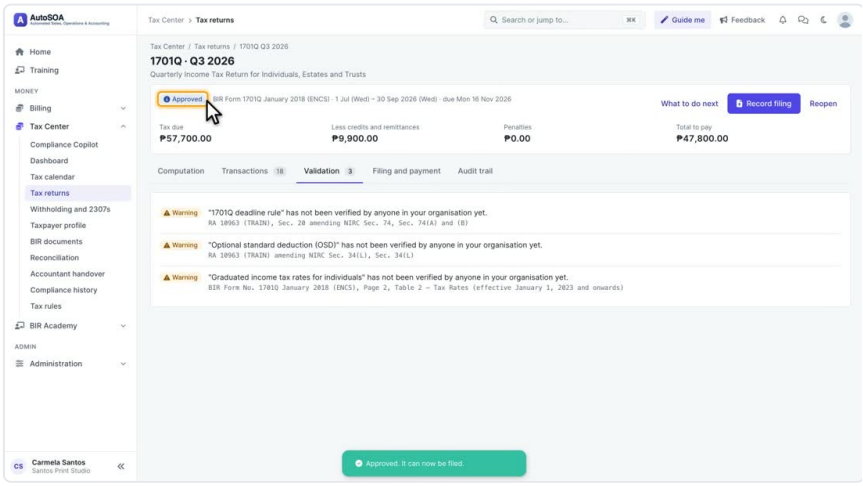
Click Validation.



Validation lists what AutoSOA wants you to read. An error stops the approval. A warning does not. These warnings say nobody has checked these rules yet.

5

Click Approve.



The return says Approved.

Ana sent the return for review. Carmela checked it, and she approved it. Next, you file the return with BIR.

Check yourself

▼ Does a warning stop an approval?

No. An error stops it. A warning does not.

Common mistakes

- **The screen says:** You sent the return for review, and you see no Approve button.
  Do: Somebody else approves it. The person who prepares a return never approves it.

Lesson 16 File it

For owner · 2 min · video `tax-onboard-16.webm`

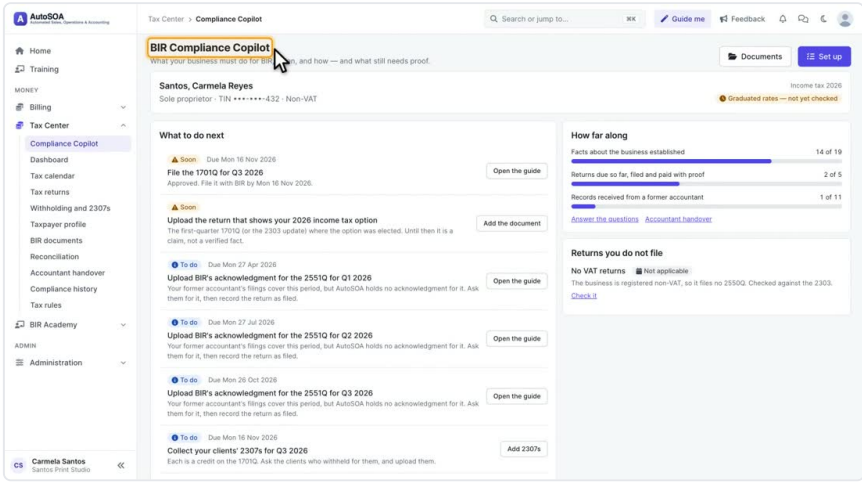
At the end you will have: the 1701Q filed, acknowledgment checked

Before you start: You need the return you approved in lesson fifteen.

Steps

1

Open Tax Center, then Compliance Copilot.

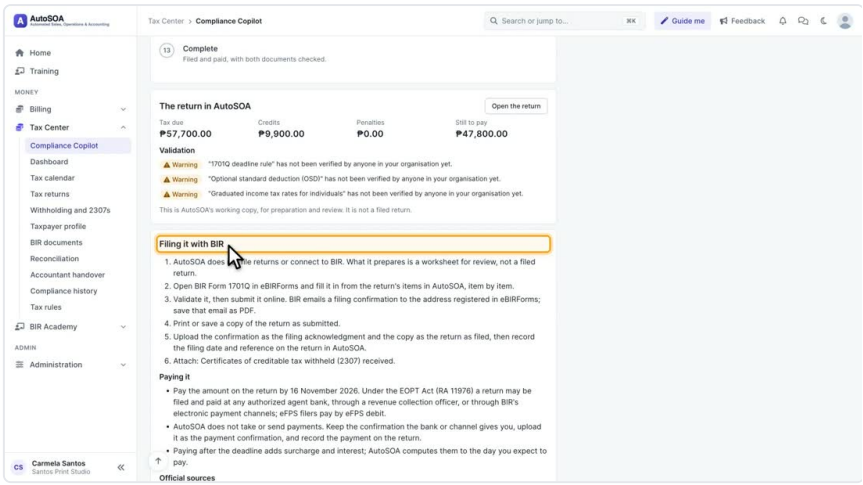


The guide has the steps for filing.

2

Find the third-quarter 1701Q under Returns for 2026.

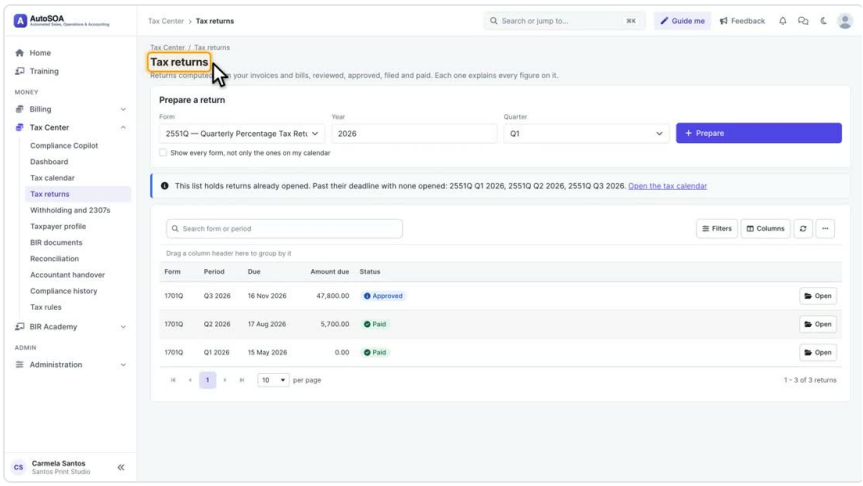
Click Guide.



Filing it with BIR lists each step.

3

Do these steps in eBIRForms, outside AutoSOA. AutoSOA never asks for your BIR password. When you finish, keep the acknowledgment.



Now record the filing. Open Tax Center, then Tax returns. This is Tax returns.

4

Click Open on the third-quarter 1701Q.

Click Record filing.

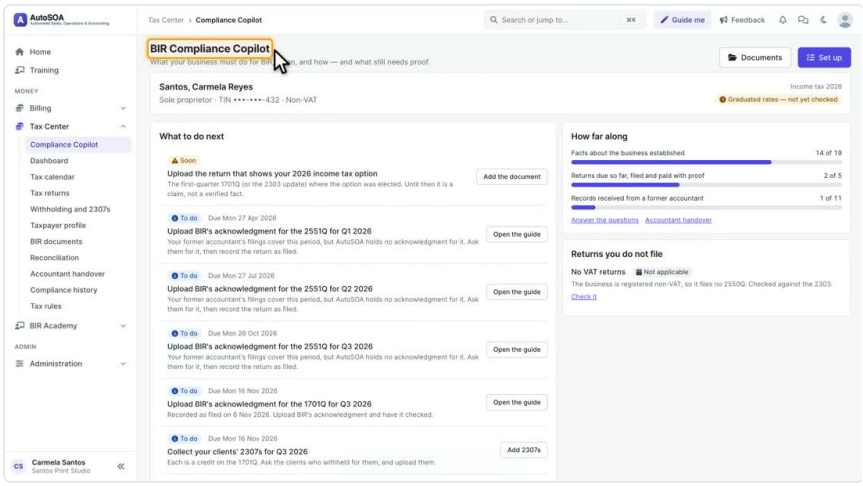
Pick today in Filed on.

Choose eBIRForms, paid at an authorized agent bank, in Filed through.

Type the reference from the acknowledgment.

Click Record filing.

Open Tax Center, then Compliance Copilot.

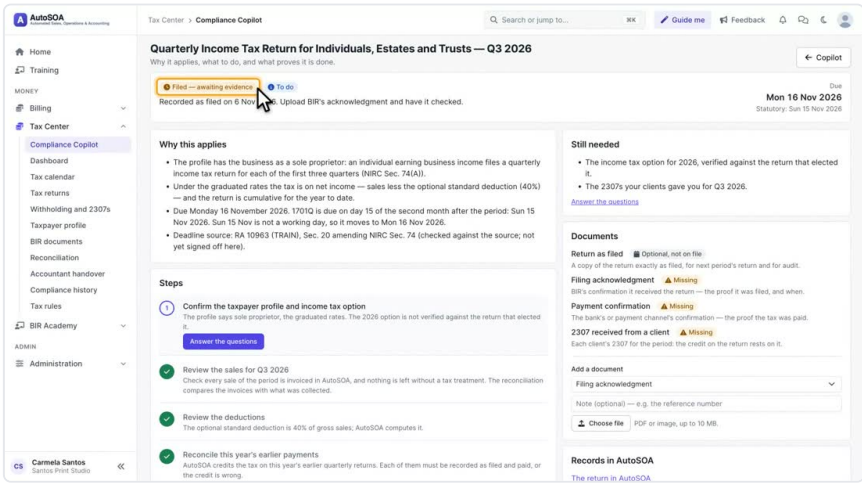


The guide asks for the proof.

5

Find the third-quarter 1701Q again.

Click Guide.



The status now waits for the proof.

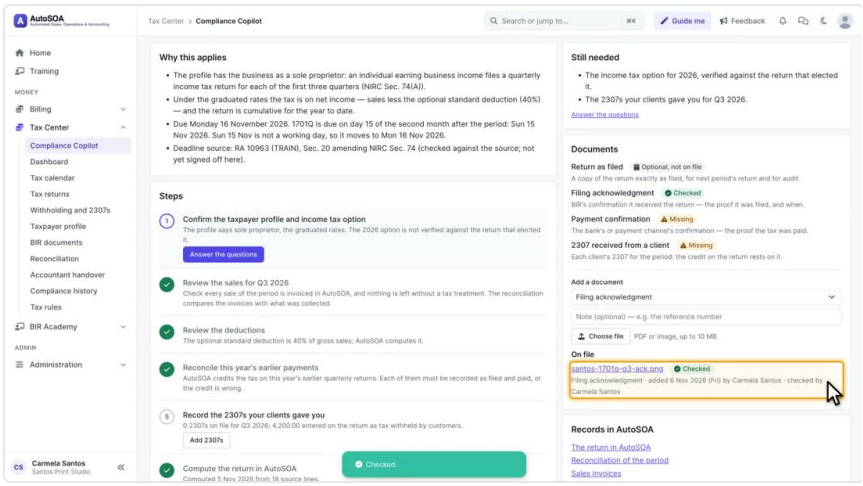
6

Compare it with the return.

Choose Filing acknowledgment in Add a document.

Click Choose file, and pick the acknowledgment.

Click It says what it should.



The acknowledgment says Checked.

You filed in eBIRForms. You recorded the filing, and you checked the acknowledgment. Next, you pay the tax, and you prove it.

Check yourself

▼ Does AutoSOA file with BIR?

No. File in eBIRForms or eFPS, then record the filing. AutoSOA never asks for your BIR password.

Lesson 17 Pay it and prove it

For owner · 2 min · video `tax-onboard-17.webm`

At the end you will have: Filed and paid

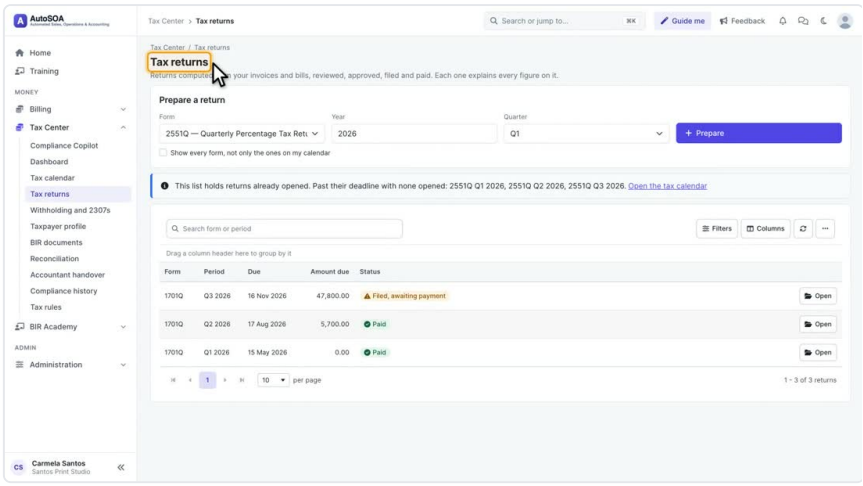
Before you start: You need the filing from lesson sixteen, and your bank confirmation.

Pay on or before the due date. A late payment adds a surcharge and interest.

Steps

1

Open Tax Center, then Tax returns.



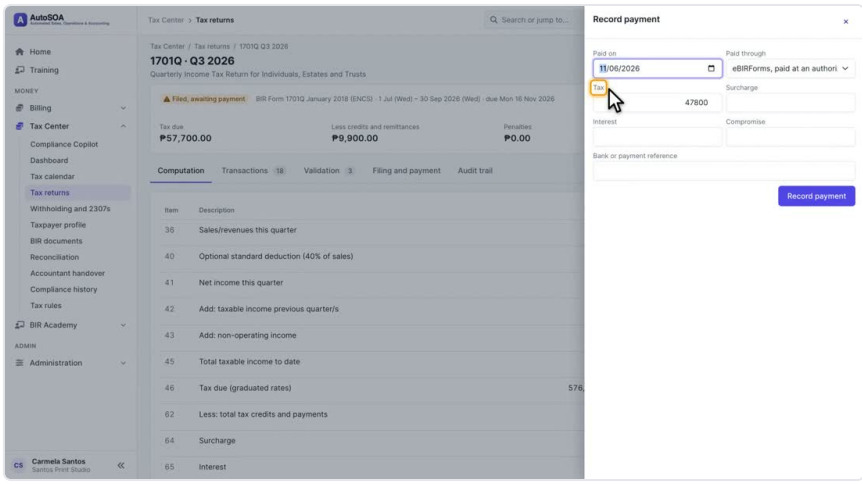
This is Tax returns.

2

Click Open on the third-quarter 1701Q.

Click Record payment.

Pick today in Paid on.



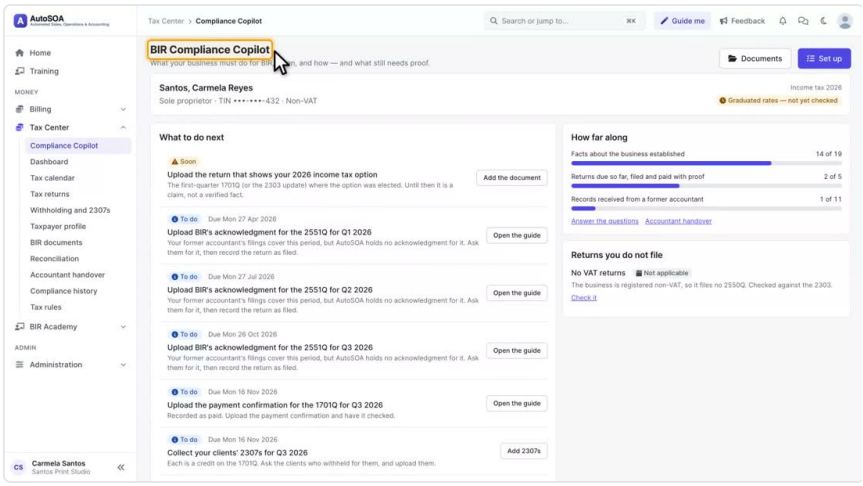
Tax already shows ₱47,800.

3

Type the bank reference.

Click Record payment.

Open Tax Center, then Compliance Copilot.



One more paper is needed.

4

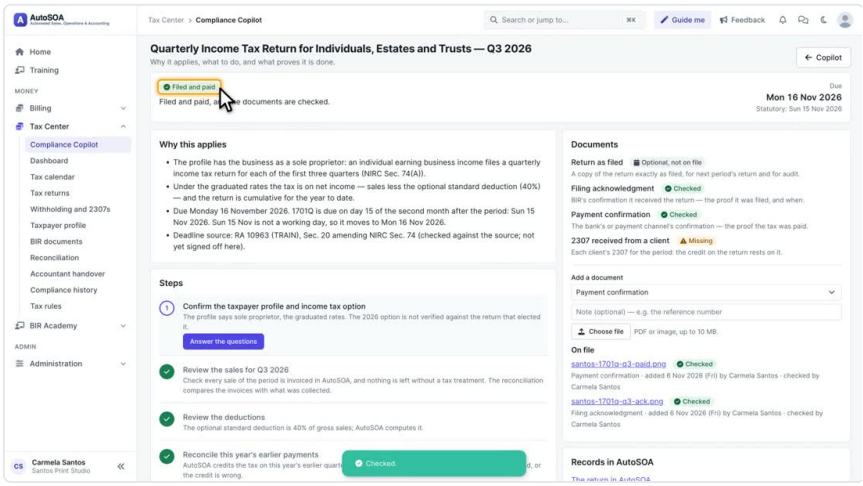
Find the third-quarter 1701Q under Returns for 2026.

Click Guide.

Choose Payment confirmation in Add a document.

Click Choose file, and pick the confirmation.

Click It says what it should.



The status says Filed and paid. This is your first full quarter in AutoSOA.

You recorded the payment, and you checked the confirmation. Filed and paid needs both papers. Next, you do your check at the end of the month.

Check yourself

▼ Why does the return say Paid before the Copilot says Filed and paid?

Paid means you recorded the money. The Copilot waits until a person checks the proof.

▼ What makes a return Filed and paid on the Compliance Copilot?

A checked acknowledgment, and a checked payment confirmation when tax was due.

Lesson 18 The month-end check

For owner · 2 min · video `tax-onboard-18.webm`

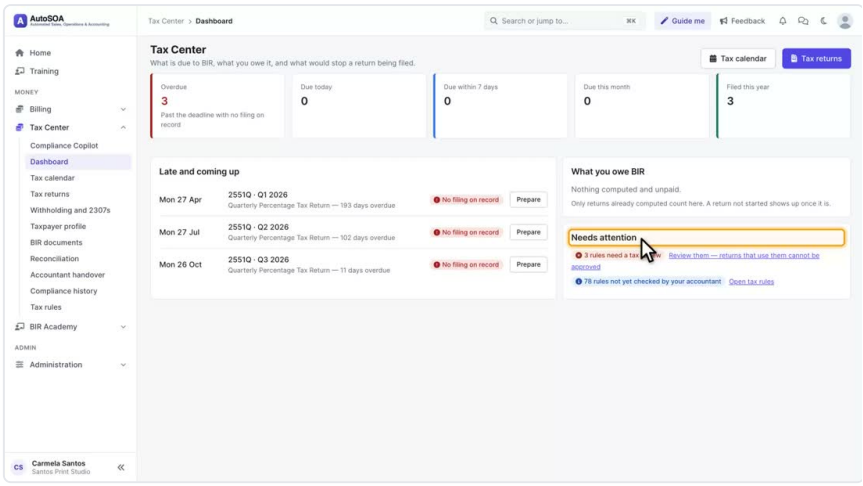
At the end you will have: a month's check done, records exported
Before you start: You need the return you finished in lesson seventeen.

Do this once a month. It takes five minutes.

Steps

1

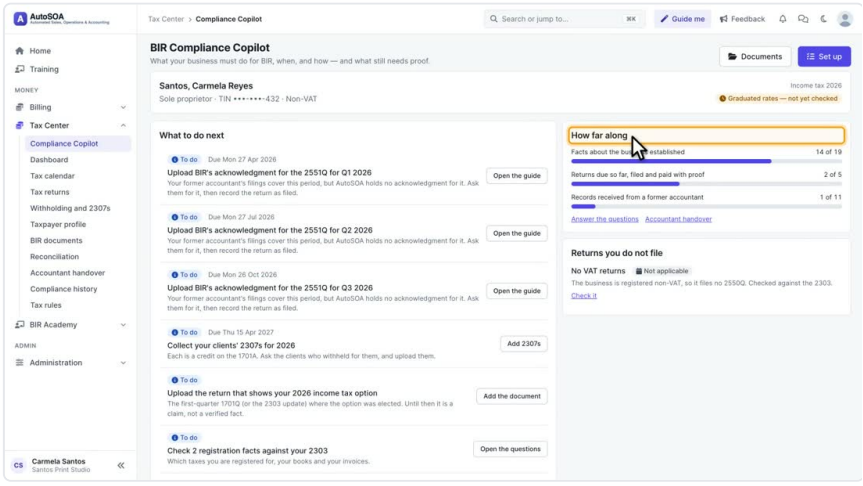
Open Tax Center, then Dashboard.



This is the Dashboard. It shows the whole Tax Center on one page. Late and coming up lists returns past their deadline, and your next deadlines. What you owe BIR shows tax on your returns that you have not paid. Today there is none. Needs attention shows what could stop a return, and rules nobody has checked yet.

2

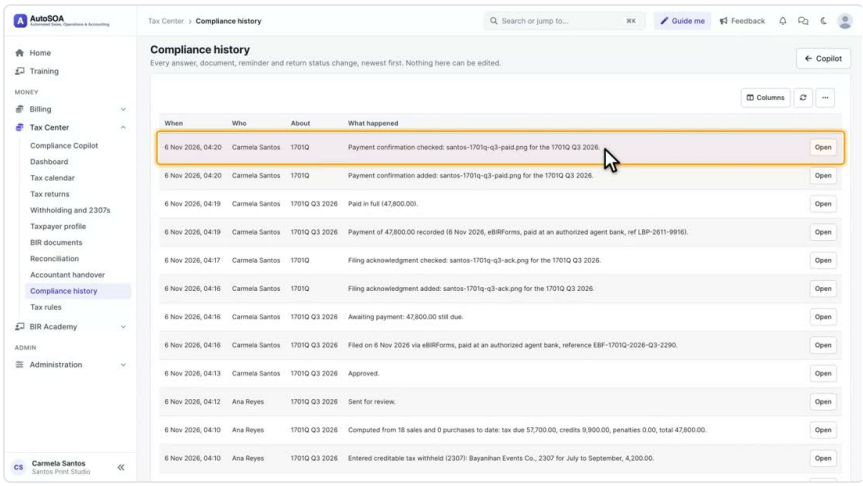
Open Tax Center, then Compliance Copilot.



Start from the top of the list. Work through What to do next, from the top. How far along shows your progress on facts, returns and records.

3

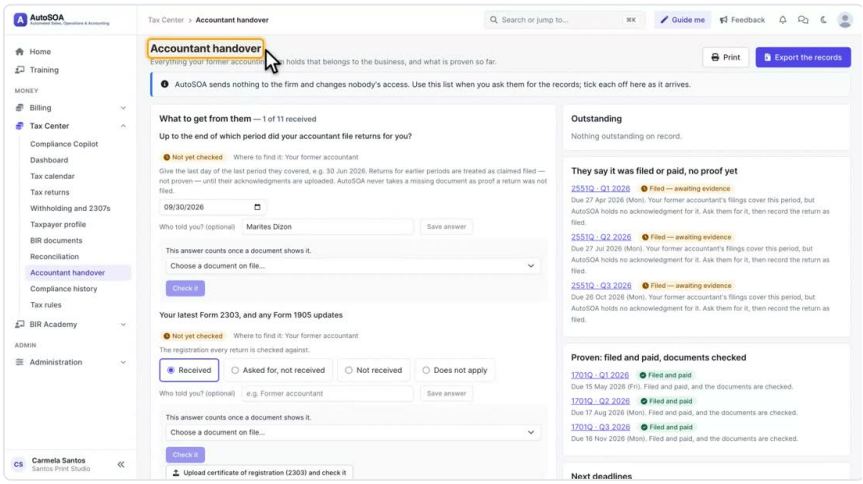
Open Tax Center, then Compliance history.



This is Compliance history. Each answer, document and return is here. Nothing here can be changed. The newest entry is at the top.

4

Open Tax Center, then Accountant handover.

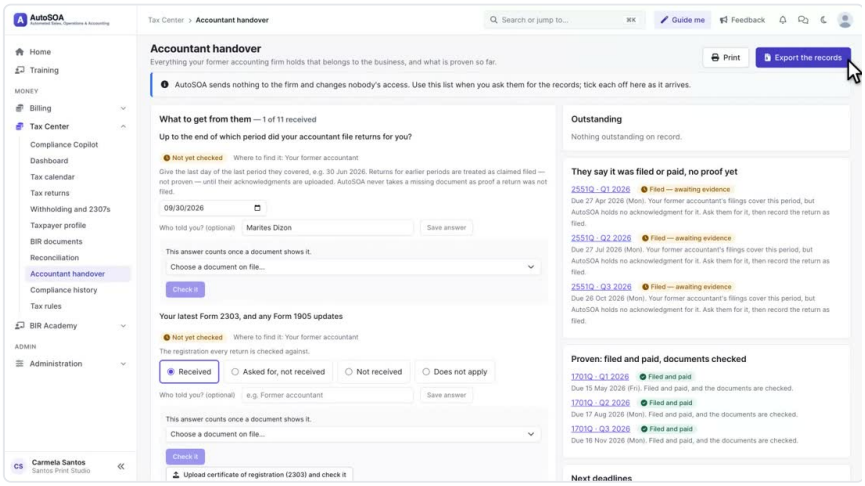


This is the Accountant handover.

5

Export the records keeps a copy of your BIR records outside AutoSOA.

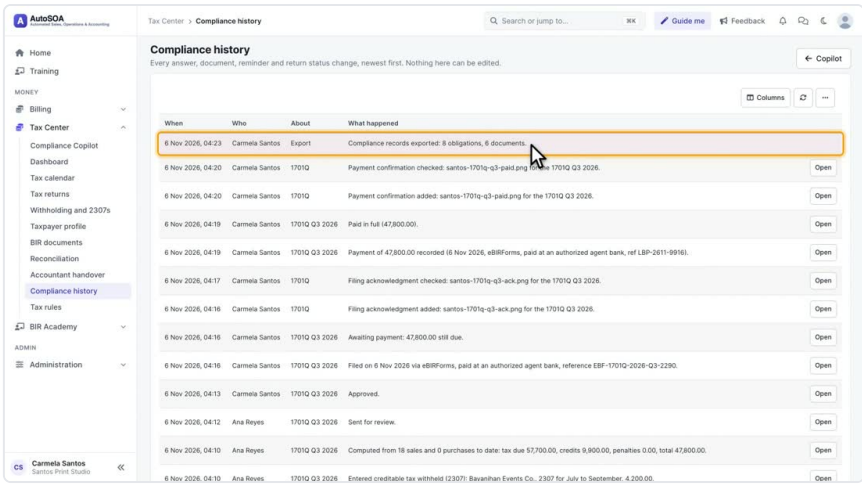
Click Export the records.



AutoSOA makes one zip file, and your browser saves it.

6

Open Tax Center, then Compliance history.



The export is in the history too. Here is your export, at the top of the history.

You looked at the Dashboard and the Copilot. You looked at the history, and you exported your records. That is your normal cycle. The next lessons show what to do when something goes wrong.

Check yourself

▼ How often do you do this check?

Once a month.

▼ Can anybody change Compliance history?

No. Nothing there can be changed.

Lesson 19 A return with no proof

For staff, owner · 3 min · video `tax-onboard-19.webm`

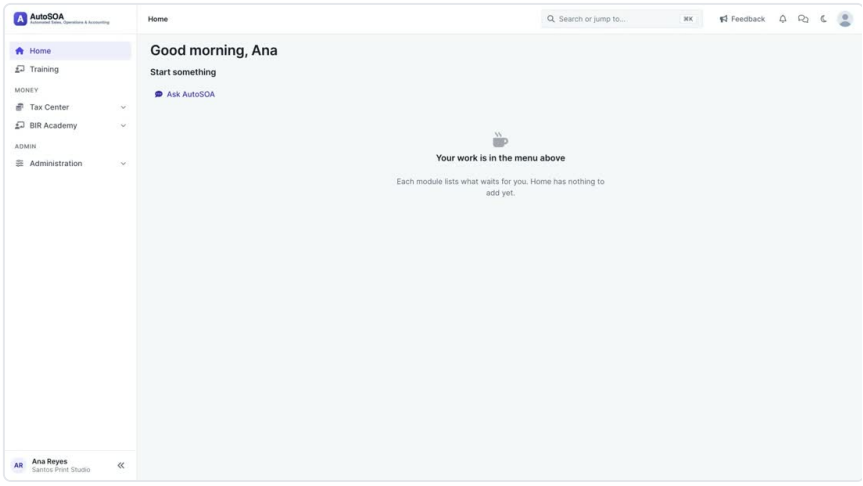
At the end you will have: the Q3 2551Q filed late and paid

Before you start: This starts from the 2551Q that was due on 26 October. In this story, BIR has no record of it.

A claim does not protect you. Ask your RDO if BIR has the return. If it has no record, file now, because the penalties grow every day.

Steps

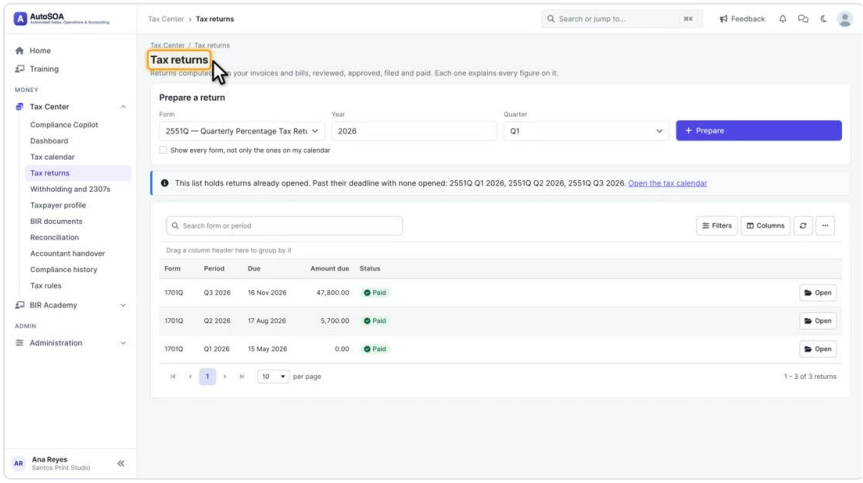
1



Your bookkeeper says she filed the third-quarter 2551Q. She cannot find the acknowledgment.

2

Ana opens Tax Center, then Tax returns.



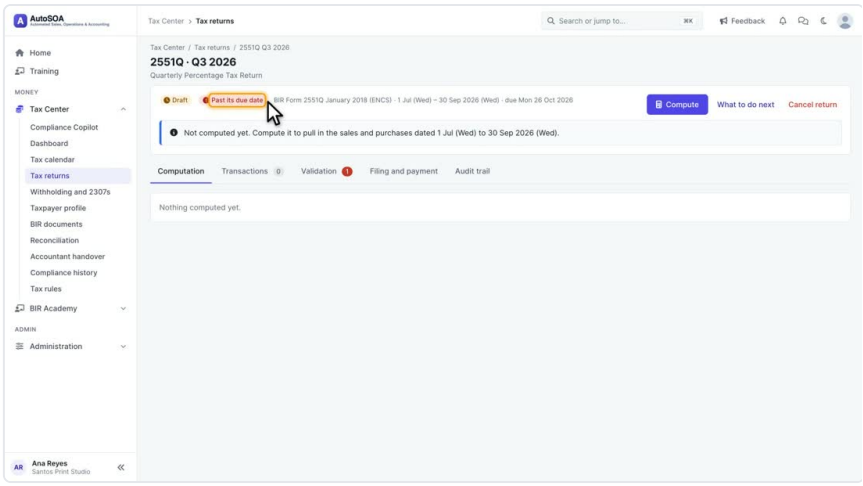
Ana prepares this return the same way.

3

Choose 2551Q in Form.

Choose the third quarter in Quarter.

Click Prepare.



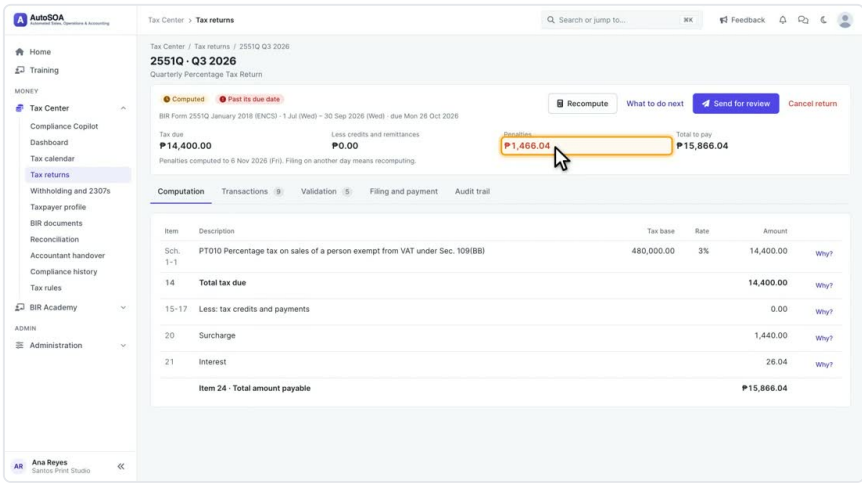
The return says Past its due date.

4

The date is today.

Click Compute.

Click Compute.



The tax is ₱14,400. That is three percent of your sales. Penalties are the surcharge and the interest to today.

5

If you file on another day, compute again. Interest changes every day.

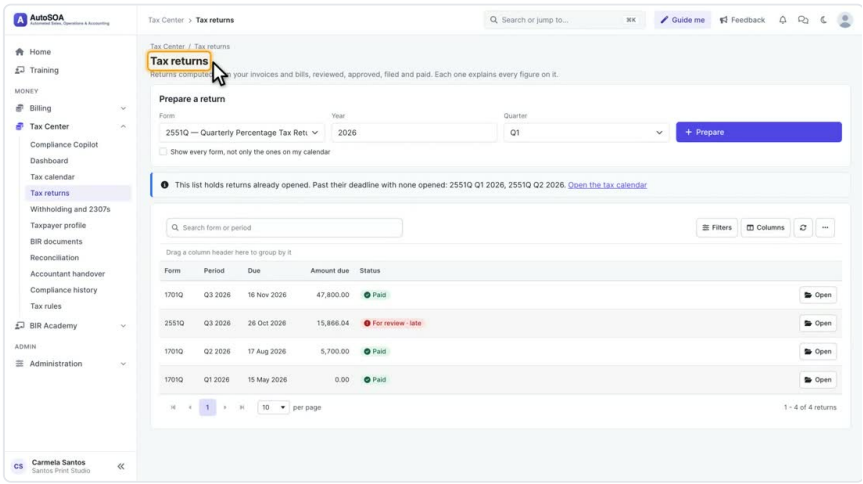
Click Send for review.

Click your picture.

Click Logout.

Carmela signs in with her user name and password.

Open Tax Center, then Tax returns.



This is Tax returns.

6

Click Open on the third-quarter 2551Q.

Click Approve.

Click Record filing.

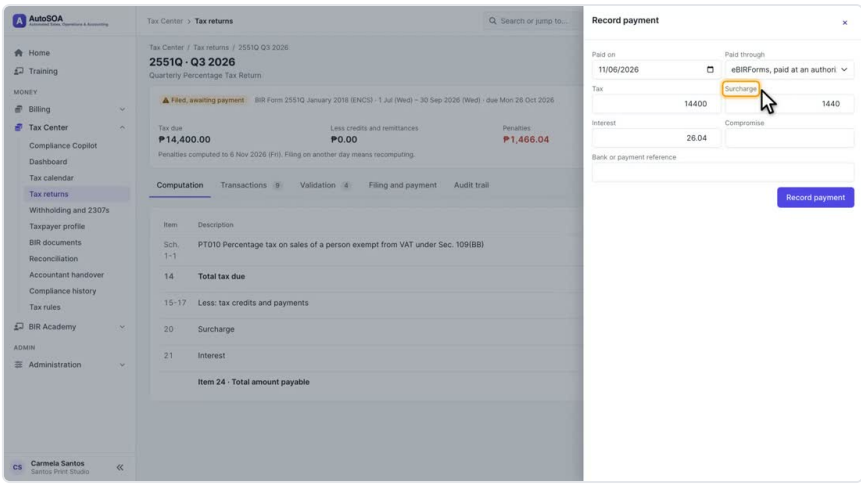
Pick today in Filed on.

Choose eBIRForms, paid at an authorized agent bank, in Filed through.

Type the reference from the acknowledgment.

Click Record filing.

Click Record payment.

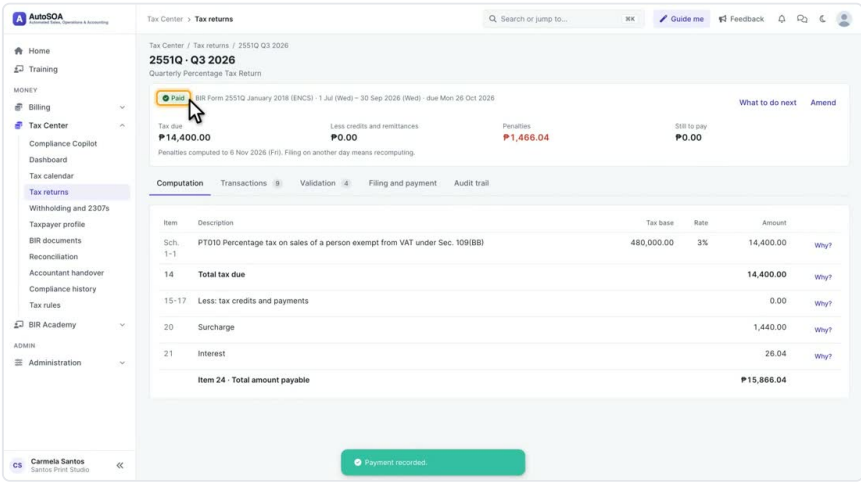


The surcharge and the interest are already filled in.

7

Type the bank reference.

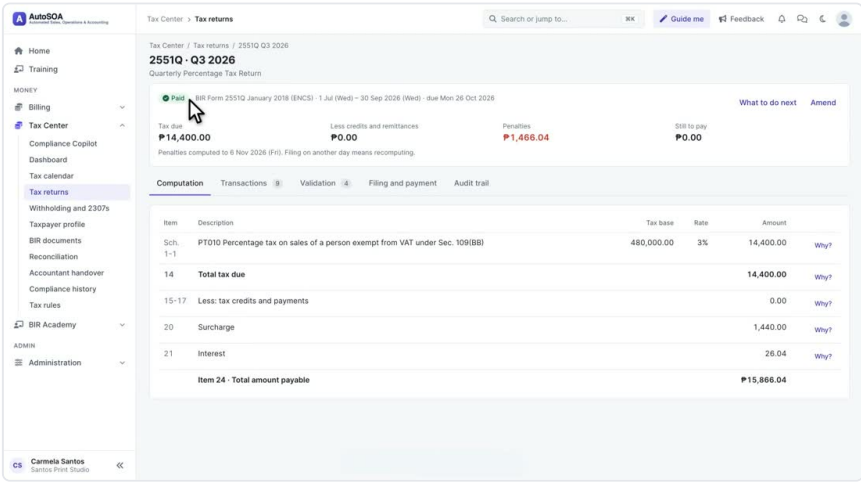
Click Record payment.



The return is paid, with its penalties.

8

Add your proof, as you did in lesson seventeen. BIR can also ask for a compromise penalty, an extra amount for a late return. Ask your tax professional.



The second-quarter 2551Q is still on your Dashboard. If BIR has no record of it, do the same for it. No proof means you cannot rely on it: ask your RDO, and file now if BIR has no record.

Check yourself

▼ What do you do first when a bookkeeper has no proof?

Ask your RDO if BIR has the return.

Common mistakes

- **The screen says:** "This return is filed after its due date, but its penalties were computed to…"
  Do: Reopen the return, compute it with the day you will file, and approve it again.

Lesson 20 A quarter with no sales

For staff, owner · 3 min · video `tax-onboard-20.webm`

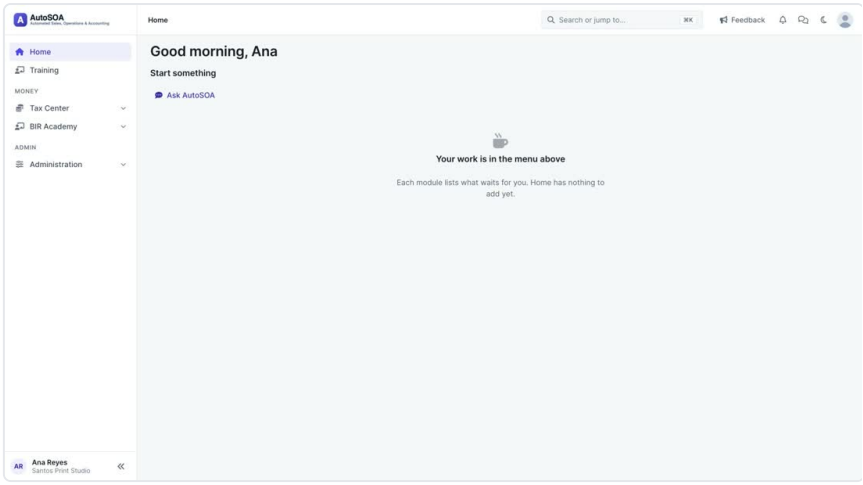
At the end you will have: the Q1 2551Q filed, with nothing to pay

Before you start: This starts from the first-quarter 2551Q. Santos Print Studio registered in January, and made its first sale in April.

No sales does not mean no return. Many new businesses forget this, and BIR can fine them for it.

Steps

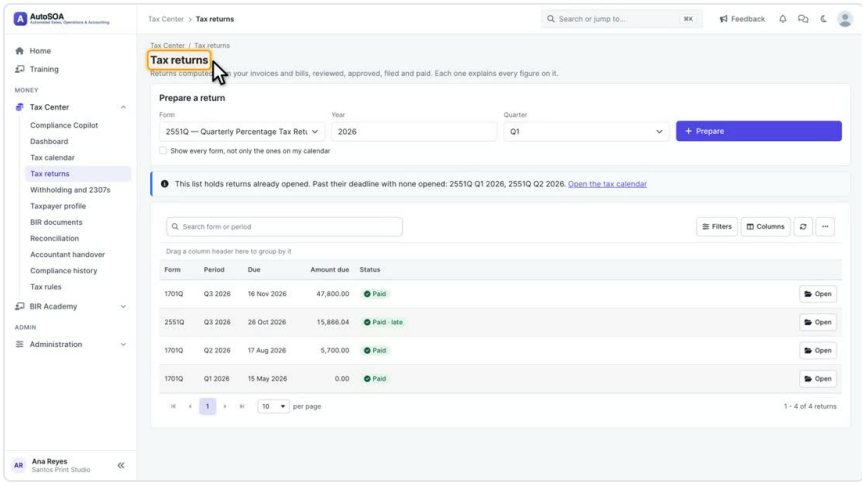
1



Your shop had no sales from January to March.

2

Ana opens Tax Center, then Tax returns.



She prepares this return the same way.

3

The date is today.

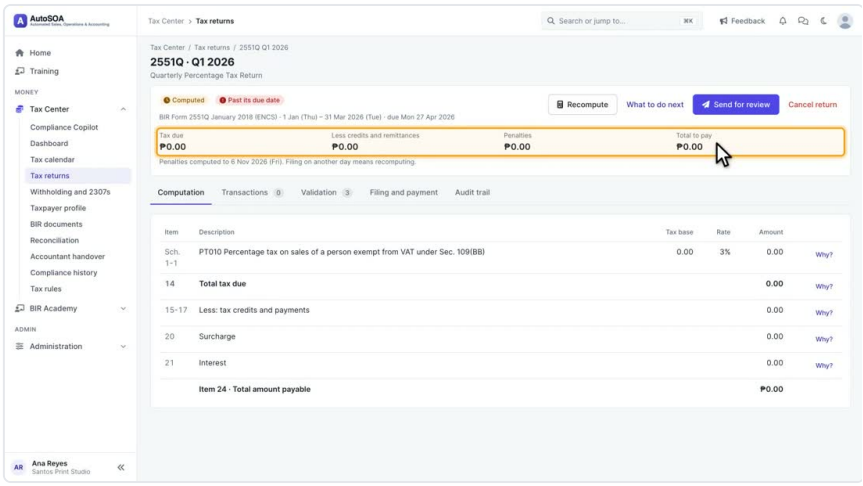
Choose 2551Q in Form.

Choose the first quarter in Quarter.

Click Prepare.

Click Compute.

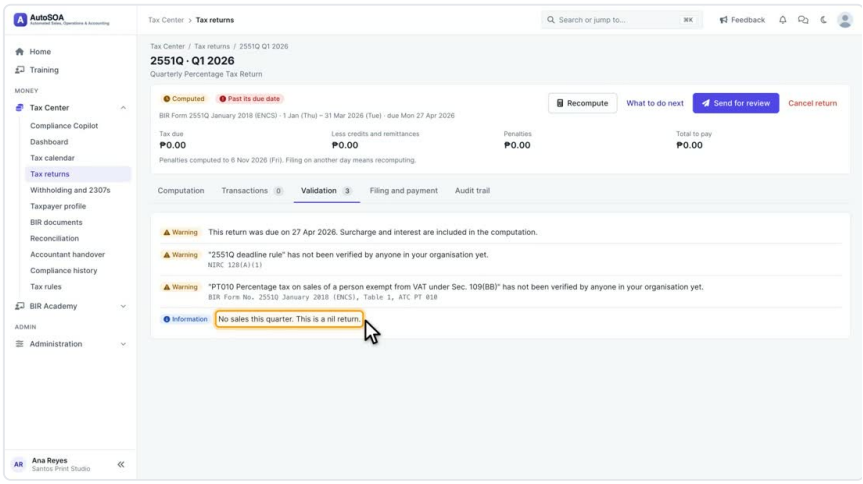
Click Compute.



The tax is zero, so there is no surcharge and no interest. BIR can still ask for a compromise penalty on a late return.

4

Click Validation.



AutoSOA notes that this is a nil return, a return with no sales.

5

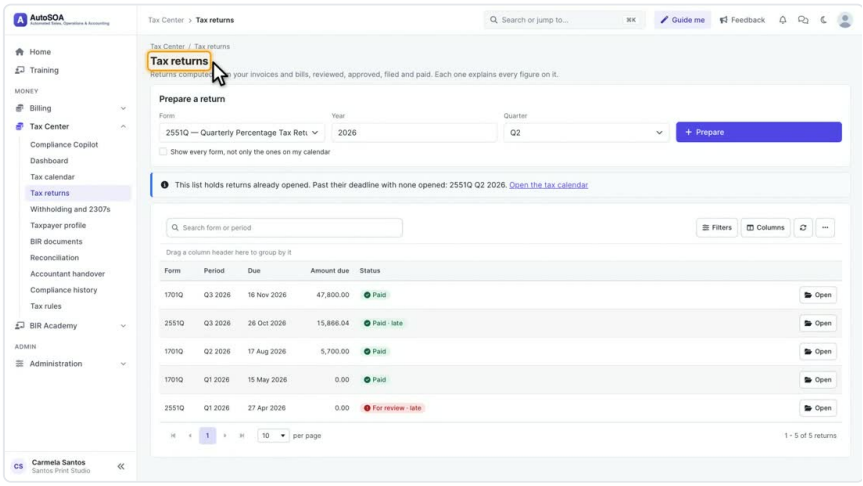
Click Send for review.

Click your picture.

Click Logout.

Carmela signs in with her user name and password.

Open Tax Center, then Tax returns.



This is Tax returns.

6

Click **Open on the first-quarter 2551Q**.

Click **Approve**.

Click **Record filing**.

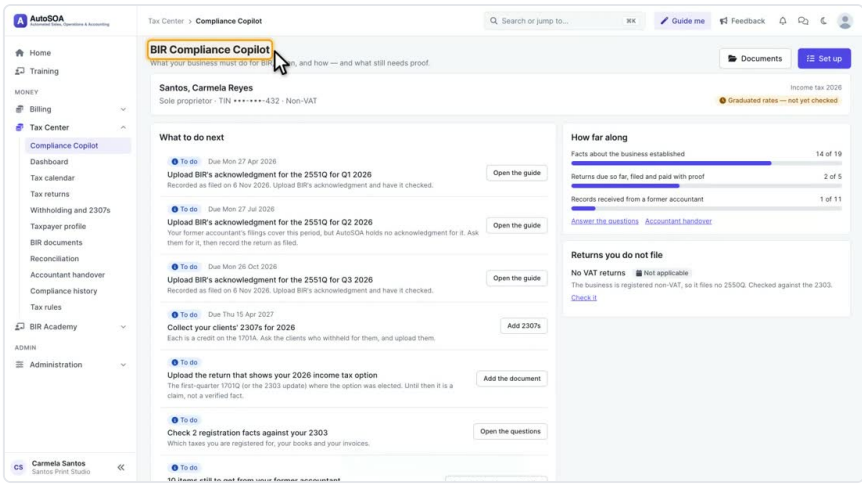
Pick today in Filed on.

Choose **eBIRForms, paid at an authorized agent bank,** in **Filed through**.

Type the reference from the acknowledgment.

Click **Record filing**.

Open **Tax Center**, then **Compliance Copilot**.



One paper proves a nil return.

7

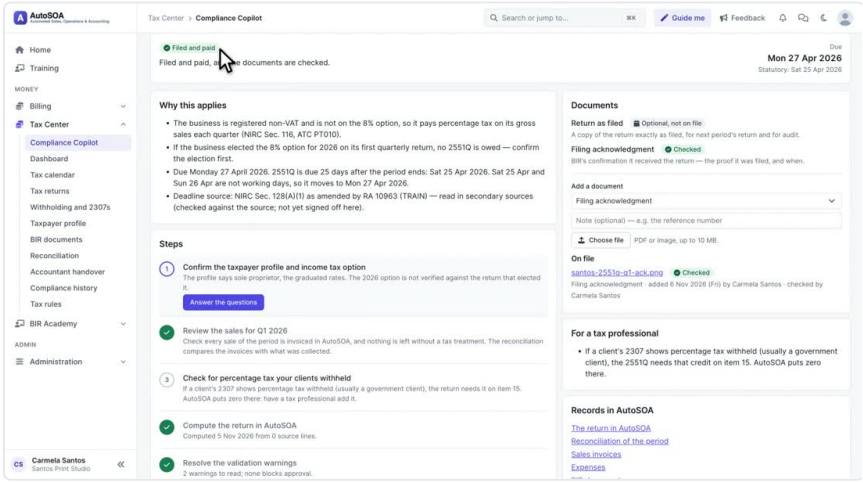
Find the first-quarter 2551Q under Returns for 2026.

Click **Guide**.

Choose **Filing acknowledgment** in **Add a document**.

Click **Choose file**, and pick the acknowledgment.

Click **It says what it should**.



The status says Filed and paid, with nothing to pay. No sales still means a return.

Check yourself

▼ Do you file a return when you had no sales?

Yes. No sales still means a return.

Lesson 21 The wrong document

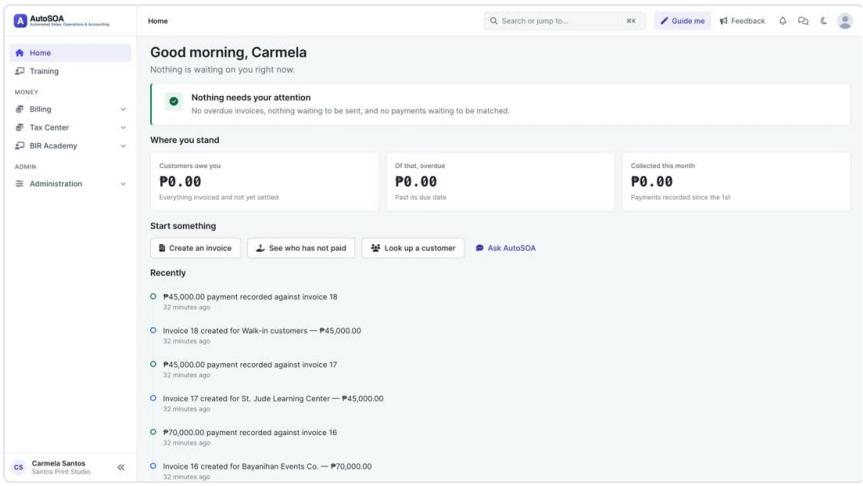
For owner · 2 min · video `tax-onboard-21.webm`

At the end you will have: the wrong paper rejected, the right one checked
Before you start: This starts from the second-quarter 2551Q. Your bookkeeper says she filed it.

A wrong paper in your file looks like proof. In an audit, it proves nothing.

Steps

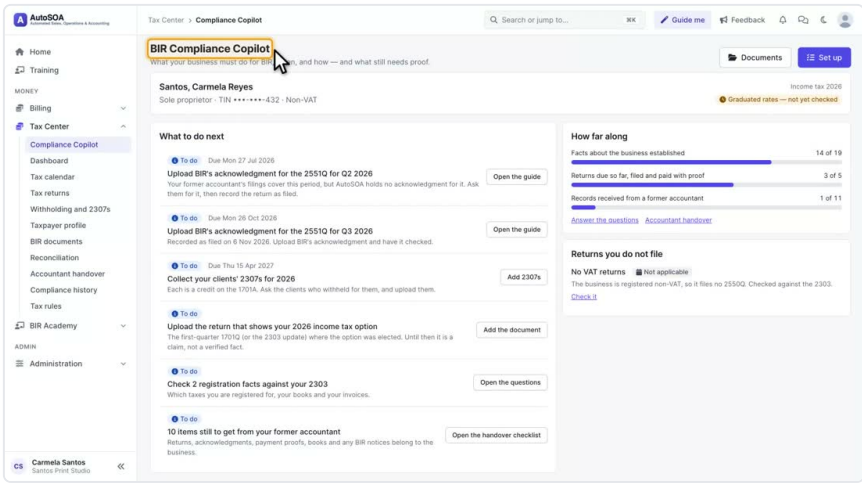
1



Your bookkeeper sends an acknowledgment. You look at it, and it is for the wrong quarter.

2

Open Tax Center, then Compliance Copilot.



Every paper comes in through a guide.

3

Read the paper before you check it. Its file name says third quarter, and this is the second-quarter guide.

Find the second-quarter 2551Q under Returns for 2026.

Click Guide.

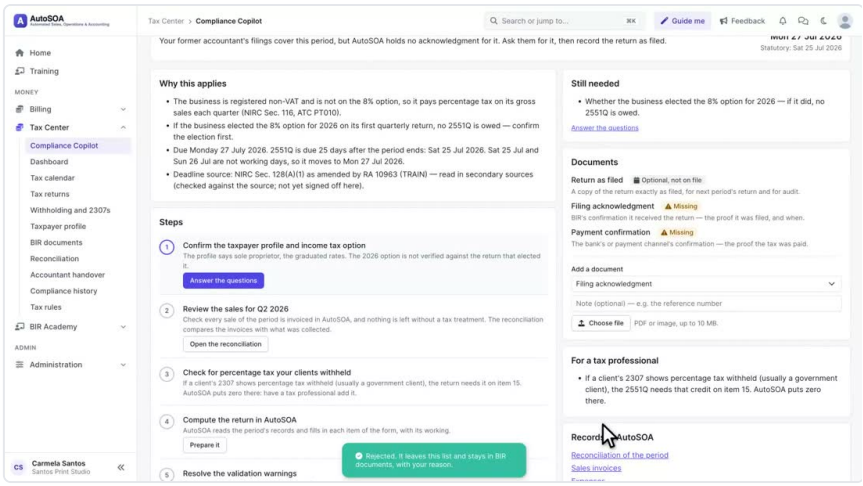
Choose Filing acknowledgment in Add a document.

Click Choose file, and pick the paper.

Click It is wrong.

Type why in the box.

Click Reject.



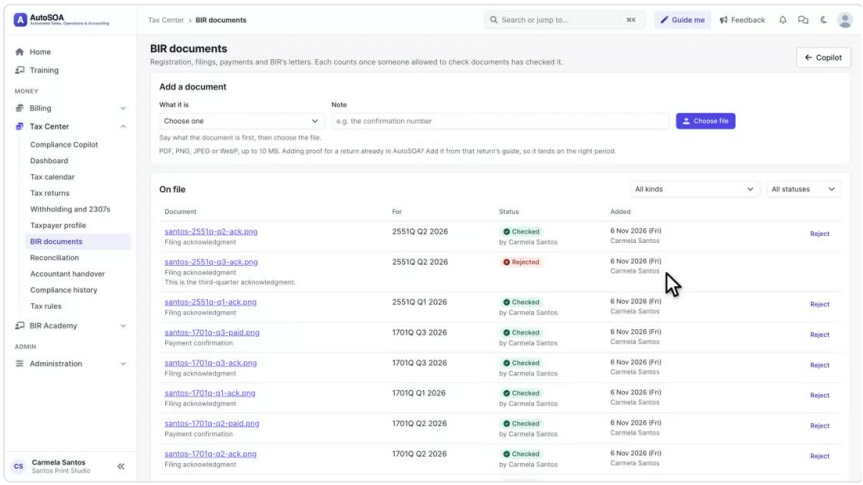
A message says the paper is rejected. It leaves this list, and it stays in BIR documents.

4

Choose Filing acknowledgment in Add a document.

Click Choose file, and pick the right paper.

Click It says what it should.



The right paper says Checked. Now see the rejected paper. Open Tax Center, then BIR documents. Every paper stays here. Here is the rejected paper in BIR documents, with its status and your reason. A paper counts only after a person checks it.

Check yourself

▼ Where does a rejected paper go?

It leaves the guide and stays in **BIR documents**, with your reason.

Lesson 22 A mistake after filing

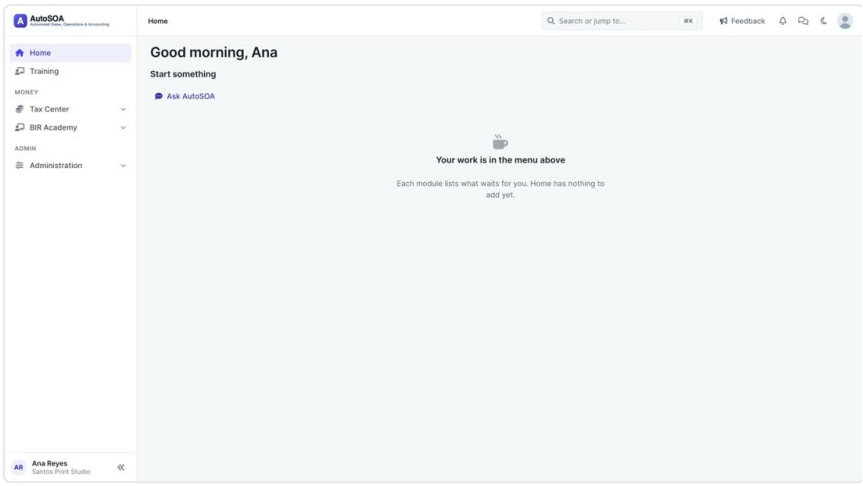
For staff · 2 min · video `tax-onboard-22.webm`

At the end you will have: the amendment sent for review
Before you start: This starts from the 1701Q you filed in lesson sixteen.

A filed return is a record. If you change it, you lose what BIR already has. You file an amended return.

Steps

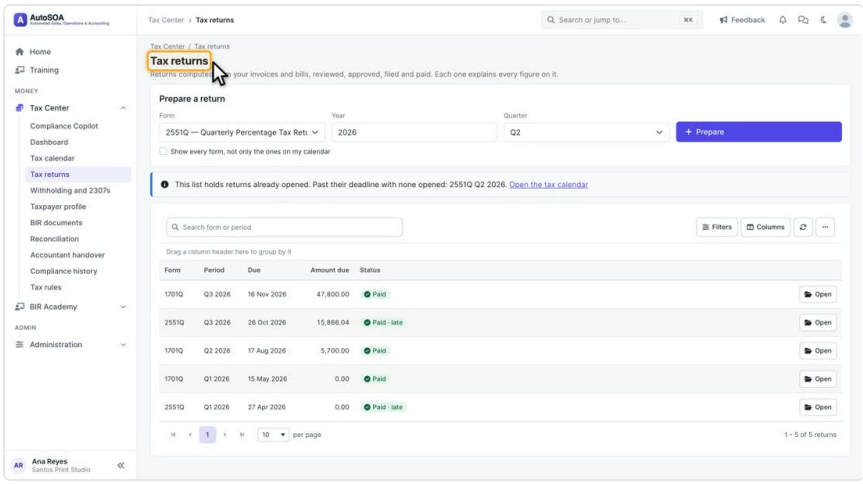
1



You filed your 1701Q. Then you remember ₱5,000 from selling an old printer.

2

Ana opens Tax Center, then Tax returns.



This is Tax returns.

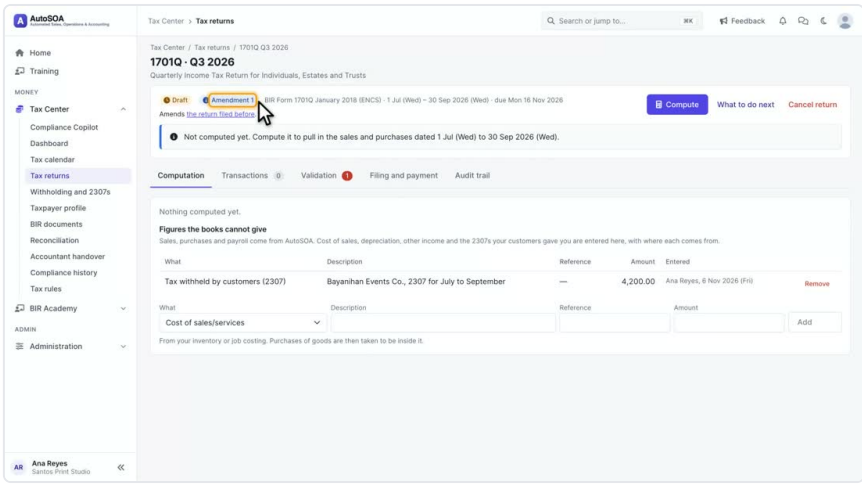
3

Click **Open on the third-quarter 1701Q**.

Click **Amend**.

Type why in the box.

Click **Open amendment**.



A new return opens. It says Amendment 1, and it keeps the 2307 you entered.

4

Click **Compute**.

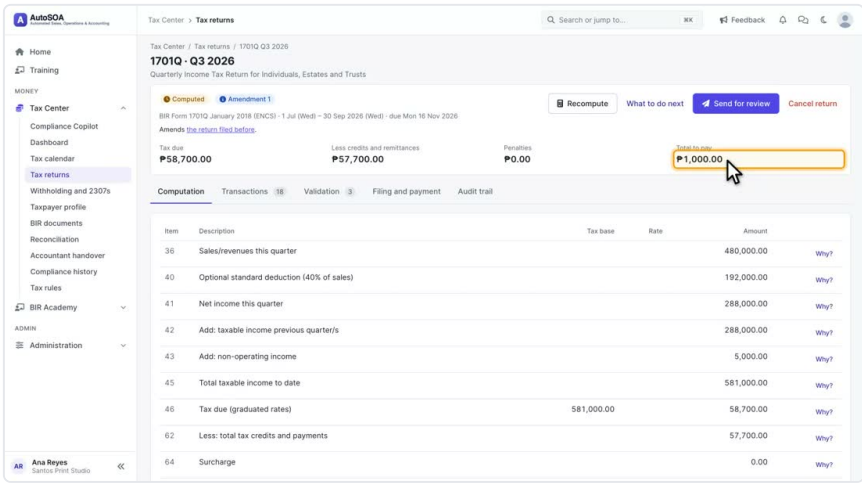
Choose **Other income** in **What**.

Type what it was in **Description**.

Type 5,000 in **Amount**.

Click **Add**.

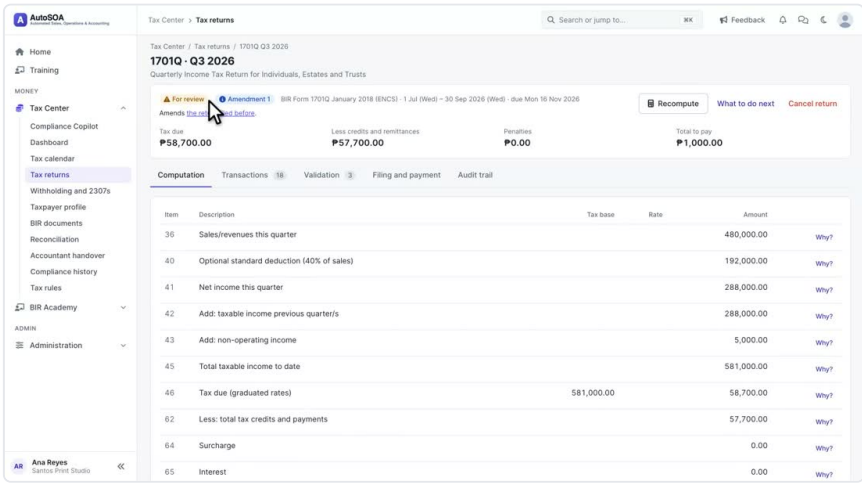
Click **Recompute**.



Tax due rises to ₱58,700. You still owe ₱1,000. AutoSOA already takes off what you paid, and your 2307.

5

Click **Send for review**.



The amendment now goes through the same steps: approve, file, pay and prove. Never change a filed return: amend it.

Check yourself

▼ Does an amendment keep your 2307s?

Yes. It also takes off what you already paid.

Lesson 23 BIR Academy

For staff · 2 min · video `tax-onboard-23.webm`

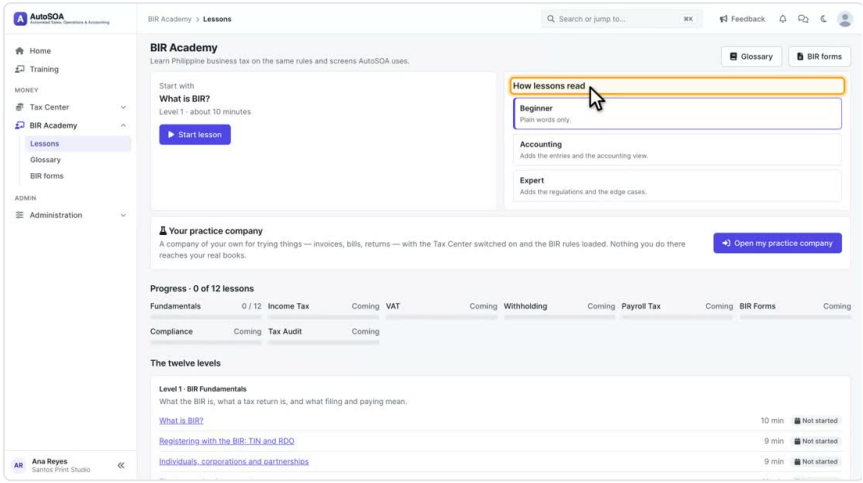
At the end you will have: a lesson finished

Before you start: You need nothing from earlier lessons. Everybody on your team can use the Academy.

Steps

1

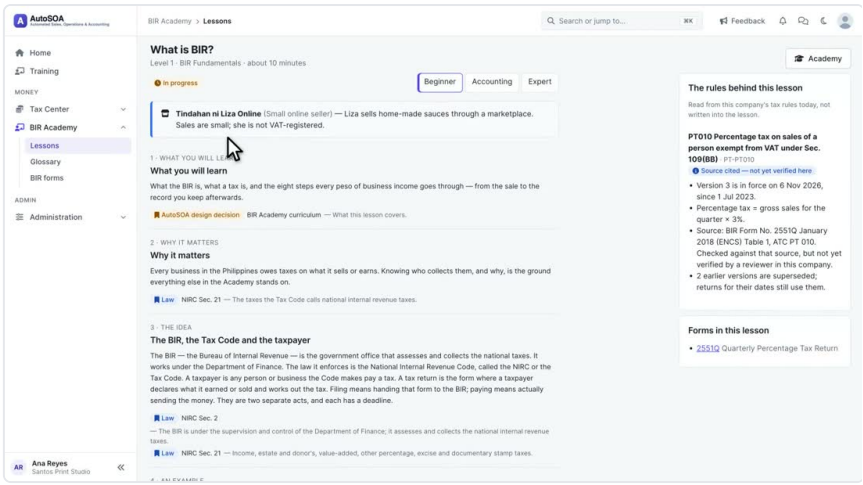
Open BIR Academy, then Lessons.



This is the BIR Academy. It teaches Philippine business tax, in plain words. How lessons read has three levels. Beginner uses plain words only.

2

Click Start lesson.



The lesson opens: What is BIR? Read it at your own speed.

3

Each lesson ends with questions. Each answer is checked.

Filing and paying are not the same.

Three percent of ₱200,000 is ₱6,000.

Real property tax is a local tax.

Choose Bureau of Internal Revenue.

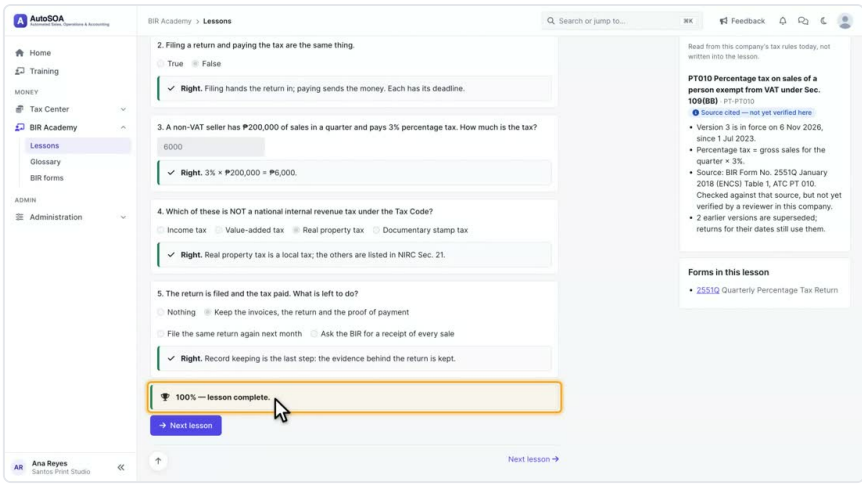
Choose False.

Type 6000.

Choose it.

Choose Keep the invoices, the return and the proof of payment.

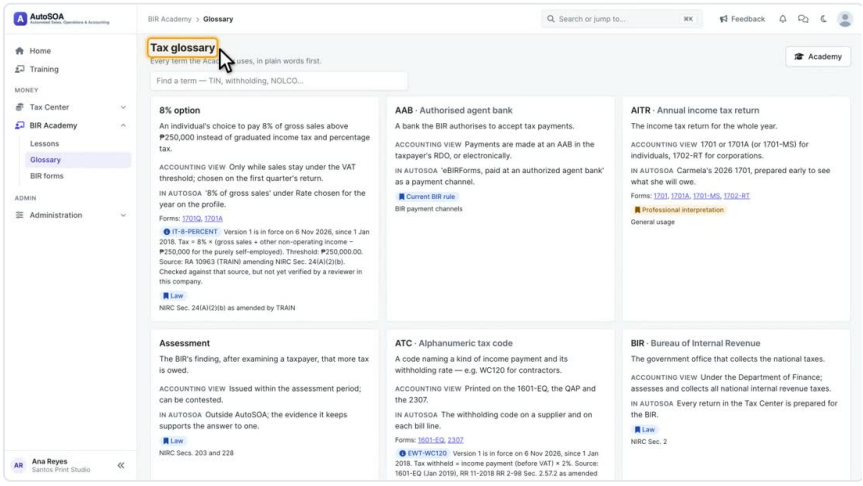
Click Mark my answers.



Your score is here, with the answers explained.

4

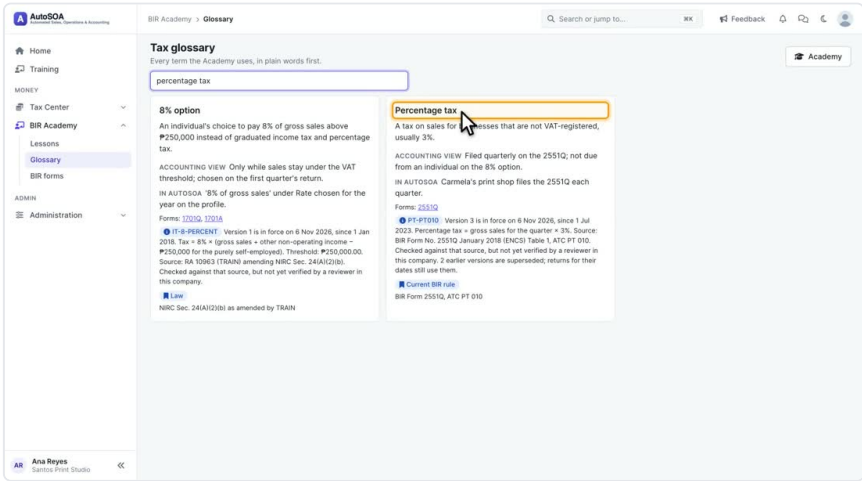
Open BIR Academy, then Glossary.



This is the Glossary. It explains each tax word in plain words.

5

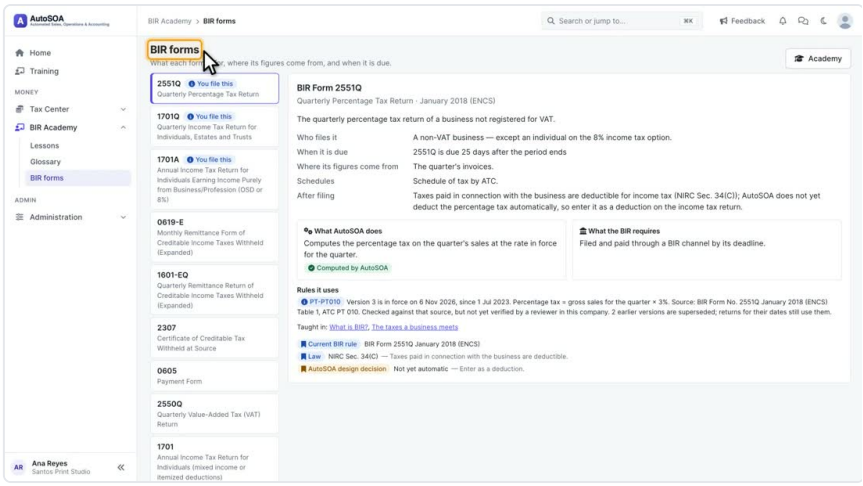
Find "percentage tax" in the search box.



Here is the word, and what it means.

6

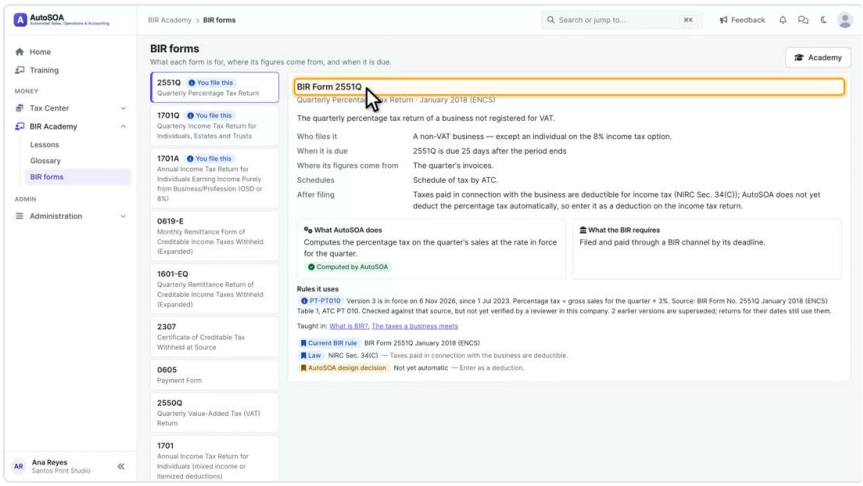
Open BIR Academy, then BIR forms.



This page explains each BIR form.

7

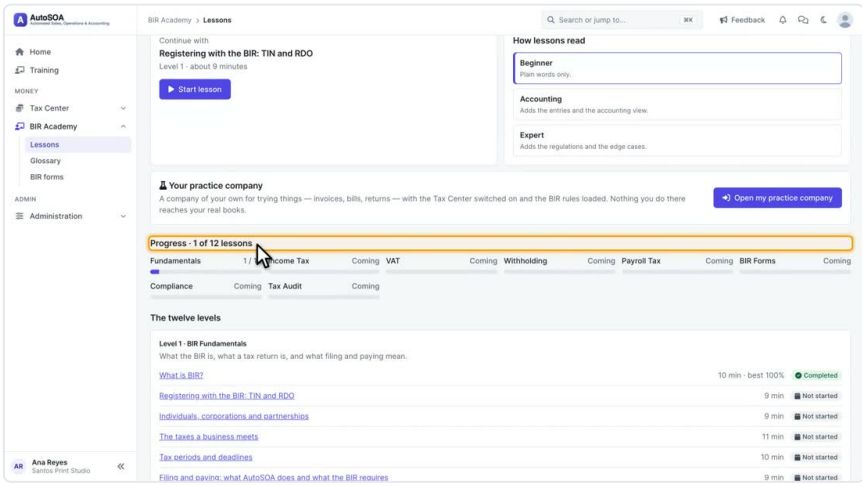
Click 2551Q Quarterly Percentage Tax Return.



It says what the form is for, and where its figures come from.

8

Open BIR Academy, then Lessons.



Your progress is saved. Progress shows one lesson finished.

Ana took a lesson and answered its questions. She found a word and a form. Next, Ana opens her practice company.

Check yourself

▼ Who can use the BIR Academy?

Everybody on your team with the BIR Academy permission.

Lesson 24 Your practice company

For staff · 1 min · video `tax-onboard-24.webm`

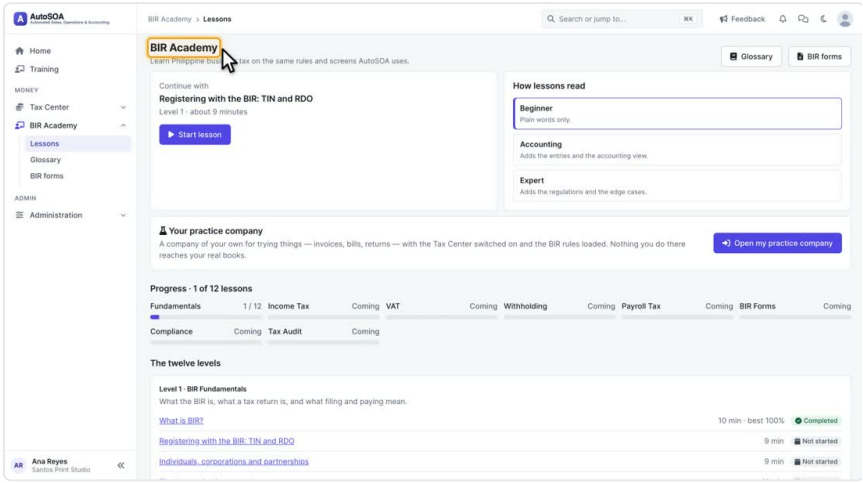
At the end you will have: a practice company opened, and back

Before you start: You need the BIR Academy from lesson twenty-three.

Steps

1

Open BIR Academy, then Lessons.

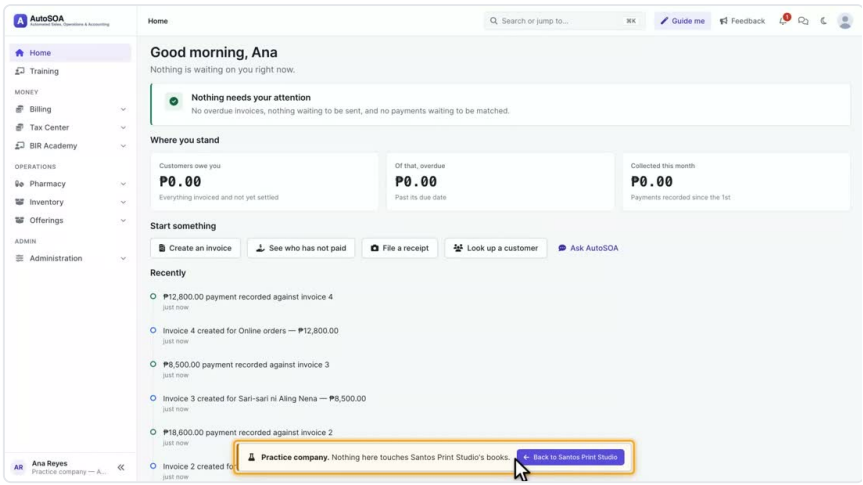


The practice company is on this page.

2

A practice company is a made-up business. You can try anything in it, and your real records do not change.

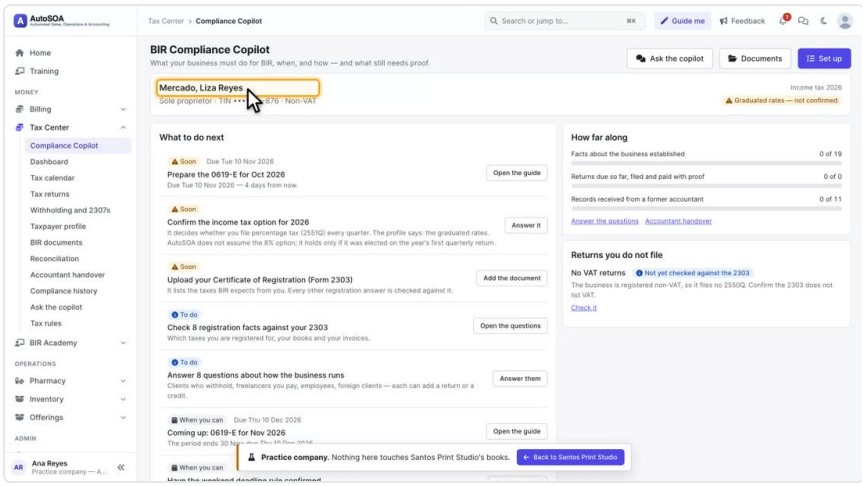
Click Open my practice company.



This bar says you are in a practice company.

3

Open Tax Center, then Compliance Copilot.

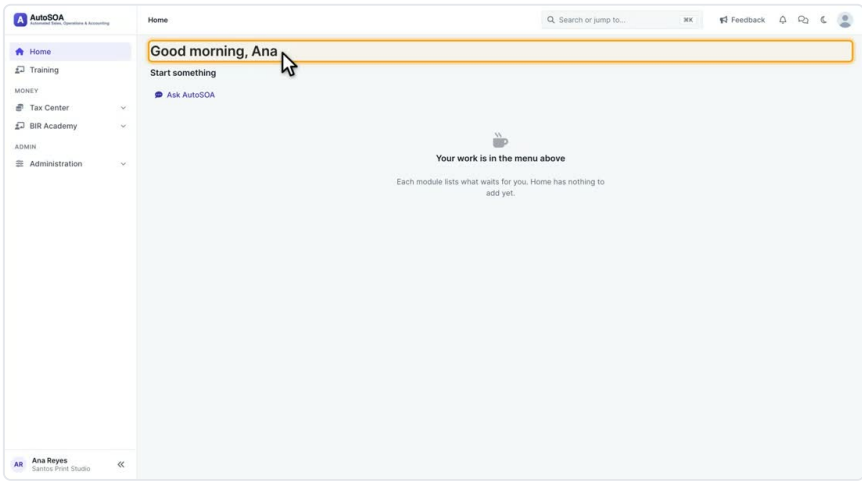


This is the same Tax Center, with made-up records. Its menu can show more modules than yours. This made-up business belongs to Liza Mercado.

4

Try a return here before you try one in your own business.

Click Back to Santos Print Studio.



You are back in your own account.

Ana opened a practice company, looked around, and came back. Her real records did not change. That is the end of this course. Your printed guide has every step, and a checklist for your first month.

Check yourself

▼ Does a practice company change your real records?

No. It is a made-up business.

When something goes another way

Your bookkeeper cannot prove a return was filed

1. Ask your RDO if BIR has the return.
2. If it has no record, have your preparer prepare and compute the return with today's date.
3. Approve it, file it, and record the filing the same day.
4. Record the payment with its surcharge and interest.
5. Add your proof, and ask your tax professional about a compromise penalty.

No proof means you cannot rely on it: ask your RDO, and file now if BIR has no record.

Lesson 19

You had no sales in a quarter

1. Prepare the return for the quarter.
2. Compute it. The tax is zero.
3. Approve it, file it, and record the filing.
4. Add the acknowledgment, and check it.

No sales still means a return.

Lesson 20

The wrong document is uploaded

1. Read the paper before you check it.
2. Click **It is wrong**, and type why.
3. Click **Reject**.
4. Add the right paper, and check it.

A paper counts only after a person checks it.

Lesson 21

You find a mistake after filing

1. Open the filed return, and click **Amend**.
2. Type why, and click **Open amendment**.
3. Enter what changed, and compute.
4. Send it for review, then approve, file, pay and prove it.

Never change a filed return: amend it.

Lesson 22

Cheat sheet

When	Task	Where	Lesson
Every quarter	Check your sales	Tax Center › Reconciliation	12
Every quarter	Prepare a return	Tax Center › Compliance Copilot › Guide	13
Every quarter	Enter a 2307	Tax returns › the return › Figures the books cannot give	14
Every quarter	Approve a return	Tax Center › Tax returns › the return	15
Every quarter	Record a filing and its proof	Tax returns › Record filing, then the Guide	16
Every quarter	Record a payment and its proof	Tax returns › Record payment, then the Guide	17
Every month	The month-end check	Tax Center › Dashboard, Compliance Copilot, Compliance history	18
When something goes wrong	No proof of filing	Tax Center › Tax returns	19
When something goes wrong	No sales in a quarter	Tax Center › Tax returns	20
When something goes wrong	A wrong paper	The return's Guide › Documents	21
When something goes wrong	A mistake after filing	The return › Amend	22

Glossary

Term	What it means for your business	Where you see it
1701Q	The quarterly income tax return of an individual in business.	Tax calendar, Tax returns
2303	Your Certificate of Registration from BIR.	BIR registration, BIR documents
2307	The paper a customer gives you for tax it kept back from what it paid you. It is a credit against your income tax.	Tax return
2551Q	The quarterly percentage tax return of a business not registered for VAT.	Tax calendar, Tax returns
Acknowledgment	BIR's proof that it received your return.	Guide, BIR documents
Amendment	A new return that replaces one you filed.	Tax return
Compliance Copilot	The page that says what you must do for BIR, and what still needs proof.	Tax Center
Filed elsewhere	A return filed outside AutoSOA, such as one your bookkeeper filed.	Tax return
Graduated rates	Income tax by bracket. It comes with percentage tax on your sales.	Taxpayer profile
Nil return	A return for a period with no sales.	Tax return
Not yet checked	An answer that is your word, and that no document shows yet.	Set up
OSD	The optional standard deduction: 40 percent off your sales, with no list of expenses.	Taxpayer profile
Percentage tax	A tax on the sales of a business not registered for VAT.	Taxpayer profile, 2551Q
RDO	Your Revenue District Office.	BIR registration
Reconciliation	Your invoices set beside your returns.	Tax Center
TIN	Your tax identification number.	BIR registration
Verified	An answer that a document on file shows.	Set up
Working copy	A return in AutoSOA before it is filed. It is for preparation and review.	Tax return

Go-live checklist

The implementer

✓	Step
☐	Create the account with Billing & SOA and BIR Tax Compliance on the host's Tenants page.
☐	Check that the Tax Center opens for the owner, with no 403 message.
☐	Confirm the module is on the account as paid or complimentary, so a later module sync keeps it.
☐	Check the first sign-in with the owner.

Your team

✓	Step
☐	Return the questionnaire.
☐	Finish the Billing course, so your invoices are in Billing.
☐	Load the BIR rules (lesson 01).
☐	Add your preparer (lesson 02).
☐	Save your BIR registration and Taxpayer profile (lessons 03, 04).
☐	Upload your 2303 and answer the setup questions (lessons 05 to 07).
☐	Ask your tax professional about the weekend deadline rule, then record it (lesson 09).
☐	Run your first return with the implementer watching (lessons 13 to 17).

Signed off by _____ (implementer) and _____ (client) on _____

Getting help

Questions? Email admin@autosoa.com, or click Feedback at the top of any page.