



**Inland Revenue Department**

The Government of the Hong Kong Special Administrative Region  
of the People's Republic of China



# Manage Service Agent

## Background

### (i) Who is Service Agent?

“Service Agent” means a Tax Representative, Company Secretary, Service Provider and/or Person managing the non-corporate Part 4AA Entity (for handling Pillar Two Matters only) appointed under the BTP.

### (ii) Who can appoint Service Agent?

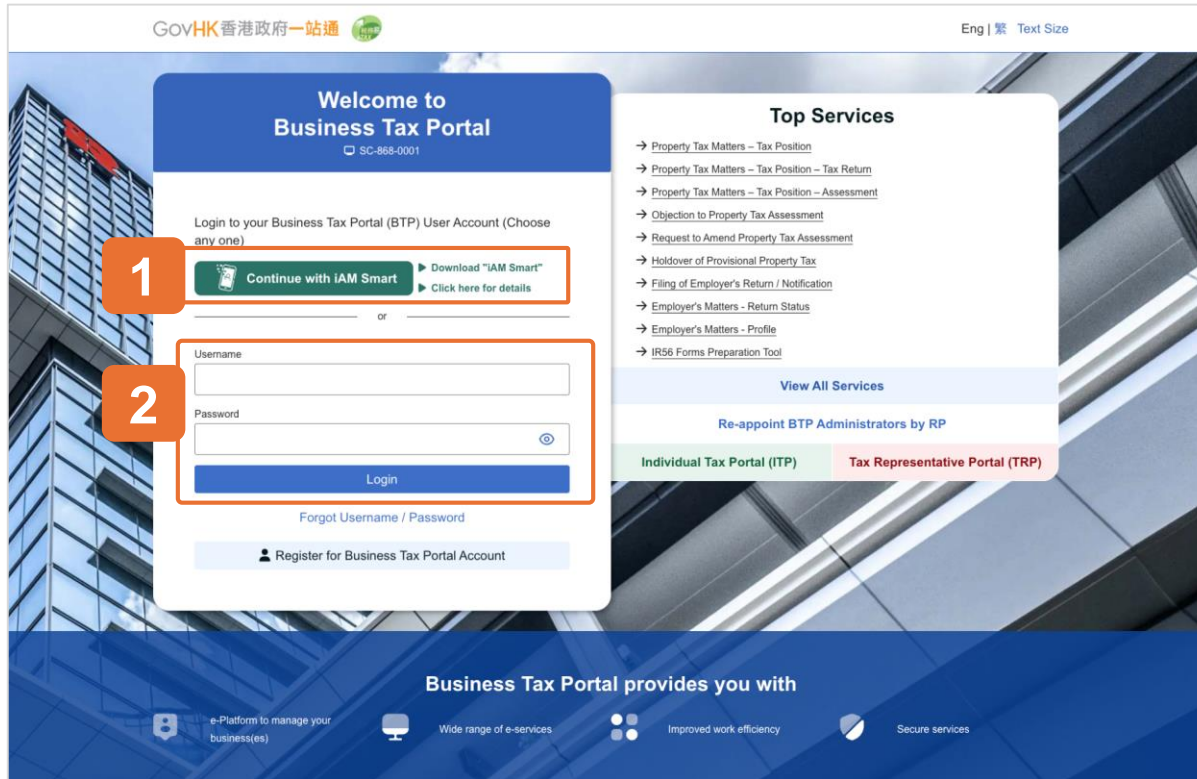
Only BTP Administrator of the Business can appoint the Service Agents to act for or on the Business’ behalf using the Tax Representative Portal (TRP) services.

## Background

### (iii) What kind of services can the Business assign to its Service Agent(s)?

Type of Service Agent	Services can be assigned
Tax Representative	Profits Tax Matters
	Property Tax Matters
	Employer's Matters
	Certificate of Resident Matters
	Pillar Two Matters
Service Provider	Filing of Profits Tax Return
	Filing of Top-up Tax Notification / Return
Company Secretary	Business Registration Matters
	Certificate of Resident Status
Person managing the non-corporate Part 4AA Entity (for handling Pillar Two Matters only)	Pillar Two Matters

# Guide to Manage Service Agent



## Getting Started

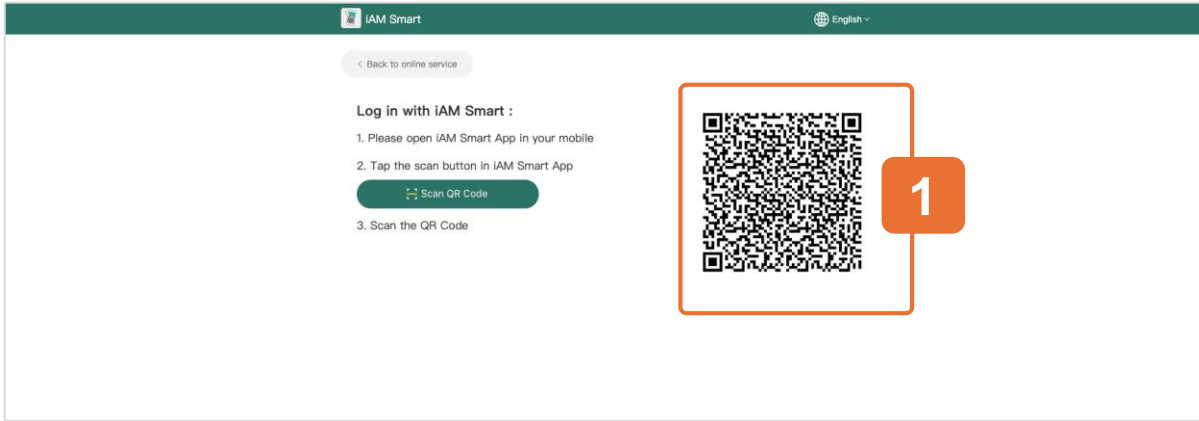
This document will guide you through the process of managing service agent such as how to view, add and remove the Service Agent(s), and to update Service Agent's details and the appointed services.

There are two methods to log in:

- 1 Login via iAM Smart.
- 2 Enter your username and password.

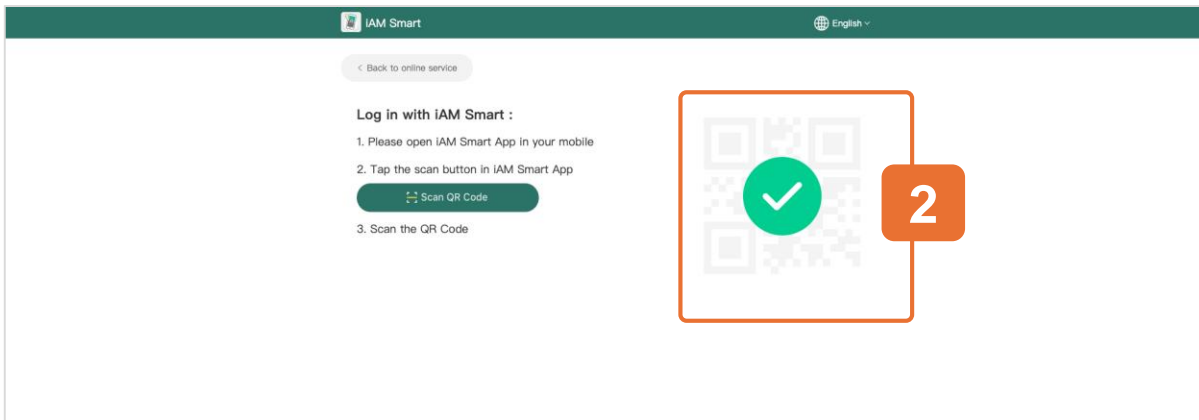
This guide will demonstrate the Login via iAM Smart.

# Guide to Manage Service Agent



## Login via iAM Smart

**1** Use the iAM Smart App in your mobile to scan the QR Code to log in with iAM Smart.



**2** Login Success.

# Guide to Manage Service Agent

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TAXPAYER A Eng 繁 Text Size Logout

Hello TAXPAYER A

SC-889-0301 User Profile

**Select BTP Business**

Search Business Registration Number or Business Name

Business Registration Number	Business Name	Your Role
99999995	TAXPAYER A COMPANY LIMITED	BTP Administrator
99999996	TAXPAYER C COMPANY LIMITED	BTP Authorized User
99999997	TAXPAYER B COMPANY LIMITED	BTP Administrator
99999998 (Pending)	TAXPAYER E COMPANY LIMITED	BTP Administrator
99999995 (Pending)	TAXPAYER A COMPANY LIMITED	BTP Administrator

Displaying 5 out of a total of 6 records

1 2 > Go to page 1 →

After Login BTP, you will see a list of the BTP Businesses which have appointed you as their BTP Administrator or BTP Authorized User.

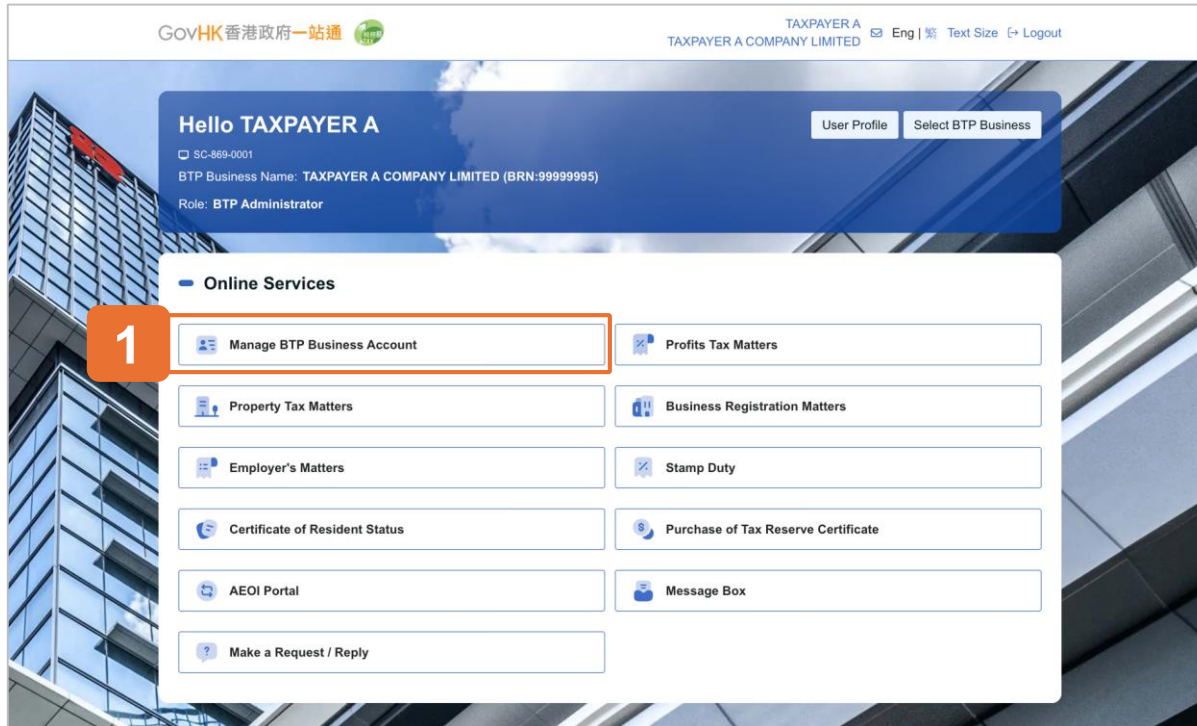
If you serve one BTP Business only, you will not see this page and will enter the “Online Service” Menu directly.

Please select the “BTP Business” to be processed from the list. You can also search the BTP Business by its Business Registration Number or Business Name.

Only BTP Administrator is given right to use the “Manage Service Agent” function.

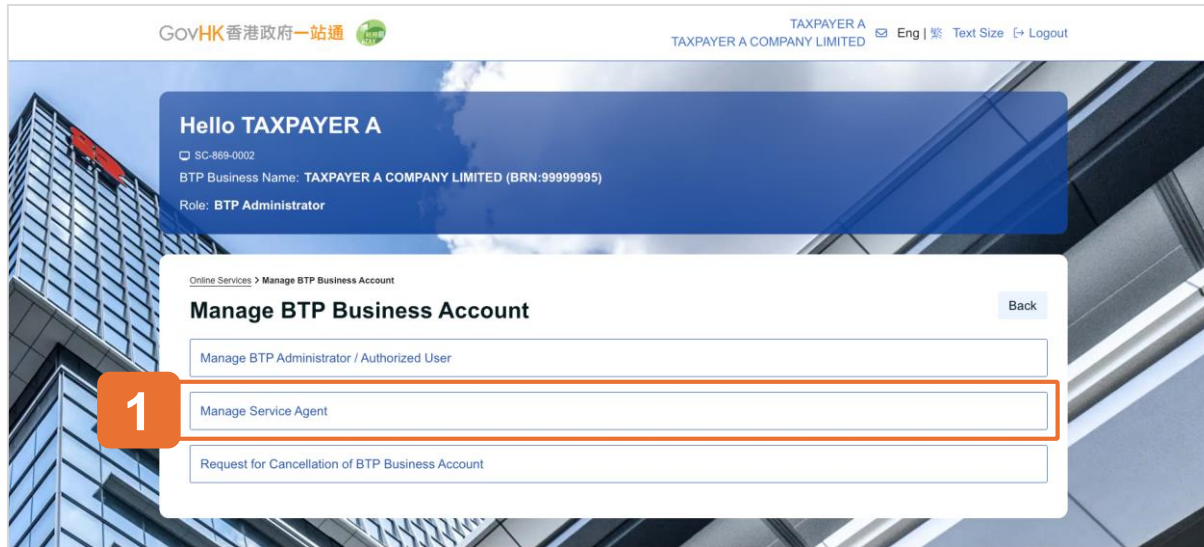
- 1 Select a “BTP Business” with BTP Administrator Role

# Guide to Manage Service Agent



1 After that, select “Manage BTP Business Account” on the online service menu.

# Guide to Manage Service Agent



1 Then select “Manage Service Agent” from the sub-menu.

# Guide to Manage Service Agent

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TAXPAYER A COMPANY LIMITED

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## Manage Service Agent

SC-869-0102

Quit

**BTP Business**

Select BTP Business 1

Business Registration Number: 99999995

Business Name: TAXPAYER A COMPANY LIMITED

**Appointed Service Agent**

Add Service Agent 2

Search Service Agent

Select Appointed Service(s)

Service Agent T1	Role T1	Appointed Services	Reference Number T1
SERVICE AGENT A LIMITED (BRN: 10000000 - 000)	Tax Representative	Profits Tax Matters	
SERVICE AGENT A LIMITED (BRN: 10000000 - 000)	Service Provider	Filing of Profits Tax Return	
SERVICE AGENT B LIMITED (BRN: 10000001 - 000)	Tax Representative	Certificate of Resident Status	
SERVICE AGENT C LIMITED (BRN: 10000002 - 000)	Company Secretary	Business Registration Matters	

3

Displaying 4 out of a total of 4 records

Go to page 1 →

After that, you will see the list of service agents of the BTP Business.

- 1 To switch to a different Business for managing its Service Agent(s), click “Select BTP Business”.
- 2 To add new service agents, click “Add Service Agent”.
- 3 To view the details of the assigned agent, click a particular Service Agent record on the page.

# Guide to Manage Service Agent

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## Manage Service Agent

SC-869-0104

**BTP Business**

Business Registration Number: 99999995

Business Name: TAXPAYER A COMPANY LIMITED

**Service Agent Details**

Business Registration Number: 10000000

Business Name: SERVICE AGENT A LIMITED

**Appointed Role(s) & Service(s)**

**Tax Representative**

Profits Tax Matters

Reference Number (if applicable):

**Service Provider**

Filing of Profits Tax Return

Reference Number (if applicable):

Back Remove Edit

After clicking a particular record, you will see the BTP Business Details, Service Agent Details and Appointed Role(s) & Service(s).

- 1 You can click “Edit” to change the Service Agent and the Appointed Role(s) & Service(s), if necessary.
- 2 You can also click “Remove” to delete this Service Agent record.

# Guide to Manage Service Agent

The screenshot shows the 'Manage Service Agent' interface. It includes sections for 'BTP Business', 'Enter Particulars of Service Agent', 'Appointed Role(s) & Service(s)', and 'Service Provider'. The 'Enter Particulars of Service Agent' section has a 'Search' button. The 'Appointed Role(s) & Service(s)' section has a 'Tax Representative' sub-section with a 'Profits Tax Matters' checkbox checked. The 'Service Provider' section has a 'Filing of Profits Tax Return' checkbox checked. The 'Company Secretary' section has two checkboxes. A 'Confirm' button is at the bottom right.

1

To change to another service agent, enter new Business Registration Number (BRN) and Branch Number. Input of Branch Number is optional. Then click “Search”, the business name corresponding to the entered BRN and Branch Number will then be extracted from IRD's records. If the name show is incorrect, check whether the entered BRN and Branch Number are correct or not. Any update made to the Service Agent will replace the existing record.

2

In the “Appointed Role(s) & Service(s)” section, if the relevant box is checked, the right of access to that online service(s) is assigned to that Service Agent, who is authorized to act on behalf of the BTP Business in relation to that service matter. You may uncheck the box to remove the assigned service(s). Enter the reference number for the service matter (if available now).

Please note that the “Company Secretary” part will appear in the case of “Corporation” only. For Unincorporated BTP businesses, you will NOT see “Company Secretary” part in this section.

3

Click “Confirm” to proceed.

# Guide to Manage Service Agent

## Manage Service Agent

SC 509-0103

Out

**BTP Business**

Business Registration Number: 00000005

Business Name: TAXPAYER A COMPANY LIMITED

**Enter Particulars of Service Agent**

Business Registration Number:

Business Name: SERVICE AGENT A LIMITED

**Appointed Role(s) & Service(s)**

**Tax Representative**

Profits Tax Matters \*

Reference Number (if applicable):

Property Tax Matters

Employer's Matters

Certificate of Resident Status \*

Pillar Two Matters \*

**Service Provider**

Filing of Profits Tax Return \*

Reference Number (if applicable):

Filing of Top-up Tax Notification/Return \*

**Person managing the non-corporate Part 4AA Entity (for handling Pillar Two Matters only)**

Pillar Two Matters \*

\* Not applicable to sole proprietorship

Back Confirm

In the “Appointed Role(s) & Service(s)” section, the following service agents related to Pillar Two Matters are available for selection:

Type of Service Agent	Services can be assigned
Tax Representative	Pillar Two Matters
Service Provider	Filing of Top-up Tax Notification / Return
Person managing the non-corporate Part 4AA Entity (for handling Pillar Two Matters only)	Pillar Two Matters

Please note that the “Person managing the non-corporate Part 4AA Entity (for handling Pillar Two Matters only)” part will only appear in the case if the BTP business is not a corporation. For Corporation, you will NOT see “Person managing the non-corporate Part 4AA Entity (for handling Pillar Two Matters only)” part in this section.

# Guide to Manage Service Agent

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TAXPAYER A  
TAXPAYER A COMPANY LIMITED

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## Manage Service Agent

SC-869-0106

Quit

### Acknowledgement

Service Agent Details of TAXPAYER A COMPANY LIMITED have been updated.

Transaction Reference Number (TRN): 9999 9999 9999 9999

Transaction Date/Time: 7 Apr 2025 15:50:55

### BTP Business

Business Registration Number: 99999995

Business Name: TAXPAYER A COMPANY LIMITED

### Service Agent Details

Business Registration Number: 10000000-000

Business Name: SERVICE AGENT A LIMITED

### Appointed Role(s) & Service(s)

Tax Representative - Profits Tax Matters

Reference Number (if applicable): DEMOPFMAT

Service Provider - Filing of Profits Tax Return

Reference Number (if applicable): DEMOPFMAT

Please note that the changes of particulars and preferences will generally take 5 working days to become effective. In addition, any notices and documents which are produced by the computer prior to the effective date of change for issue after such date will not reflect the up-to-date position of such particulars and preferences. Please accept our apology for any inconvenience caused.

Print Save **Continue**

The Service Agent Details has been updated.

**1** Click “Continue” to view the latest record.

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TAXPAYER A COMPANY LIMITED

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## Manage Service Agent

SC-869-0104

Quit

**BTP Business**

Business Registration Number: 99999995

Business Name: TAXPAYER A COMPANY LIMITED

**Service Agent Details**

Business Registration Number: 10000000

Business Name: SERVICE AGENT A LIMITED

**Appointed Role(s) & Service(s)**

**Tax Representative**

Profits Tax Matters

Reference Number (if applicable): DEMOPFMAT

**Service Provider**

Filing of Profits Tax Return

Reference Number (if applicable): DEMOPFMAT

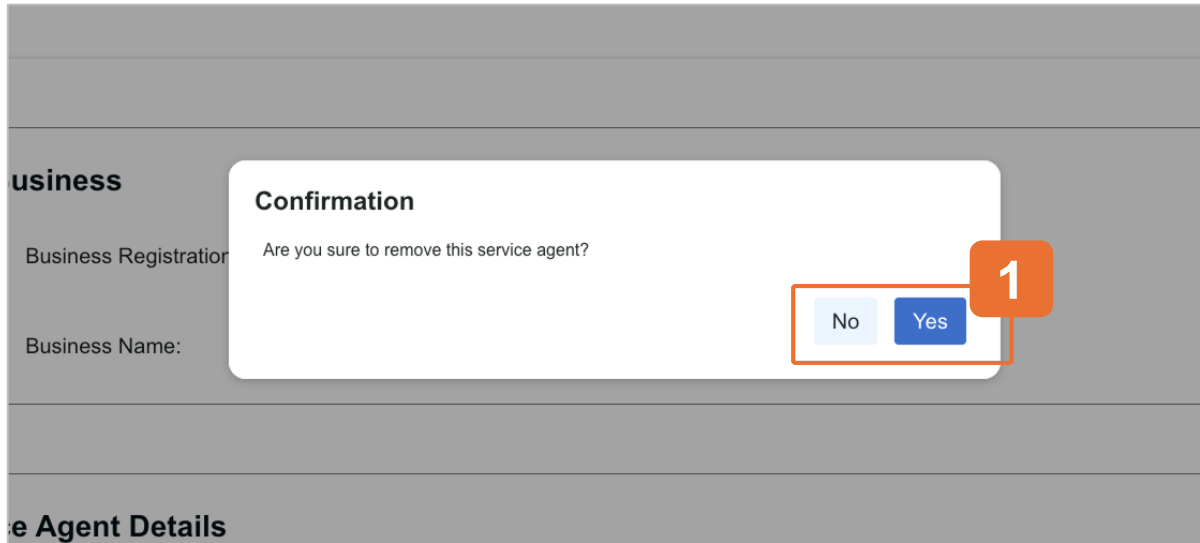
1

Back Remove Edit

Now, we demonstrate how to remove a Service Agent.

1 Click "Remove".

## Guide to Manage Service Agent



The screenshot shows a web interface with a grey background. On the left, there is a sidebar with the text "business" and "Business Registration". Below this, there is a field labeled "Business Name:". In the center, a white dialog box titled "Confirmation" is displayed. The dialog box contains the text "Are you sure to remove this service agent?". At the bottom of the dialog box, there are two buttons: "No" and "Yes". The "Yes" button is highlighted with a blue border, and an orange square with the number "1" is positioned next to it. Below the dialog box, there is a section labeled "Service Agent Details".

To remove service agent

- 1 Click “Yes” to proceed to the next step. Otherwise, click “No”.

If the service agent is removed, all related services matters will be deleted.

In this case, both Tax Representative - Profits Tax Matters and Service Provider - Filing of Profits Tax Return will be removed.

**If you only want to remove one service matter, please use the “Edit” function.**

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TAXPAYER A COMPANY LIMITED

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## Manage Service Agent

SC-869-0106

Quit

### Acknowledgement

SERVICE AGENT A LIMITED has been removed as the service agent of TAXPAYER A COMPANY LIMITED.

Transaction Reference Number (TRN):	9999 9999 9999 9999
Transaction Date/Time:	7 Apr 2025 15:55:48

### BTP Business

Business Registration Number:	99999995
Business Name:	TAXPAYER A COMPANY LIMITED

### Service Agent Details

Business Registration Number:	10000000-000
Business Name:	SERVICE AGENT A LIMITED

### Removed Role(s) & Service(s)

Tax Representative - Profits Tax Matters
Service Provider - Filing of Profits Tax Return

Please note that the changes of particulars and preferences will generally take 5 working days to become effective. In addition, any notices and documents which are produced by the computer prior to the effective date of change for issue after such date will not reflect the up-to-date position of such particulars and preferences. Please accept our apology for any inconvenience caused.

Print Save **Continue**

The Service Agent has been removed.

**1** Click “Continue” to view the latest record.

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TAXPAYER A COMPANY LIMITED

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## Manage Service Agent

SC-869-0102

Quit

**BTP Business** Select BTP Business

Business Registration Number: 99999995

Business Name: TAXPAYER A COMPANY LIMITED

**Appointed Service Agent** Add Service Agent

Search Service Agent Select Appointed Service(s)

Service Agent T1	Role T1	Appointed Services	Reference Number T1
SERVICE AGENT B LIMITED (BRN: 10000001 - 000)	Tax Representative	<span>Certificate of Resident Status</span>	
SERVICE AGENT C LIMITED (BRN: 10000002 - 000)	Company Secretary	<span>Business Registration Matters</span>	

Displaying 2 out of a total of 2 records Go to page 1

Now, we demonstrate how to add a Service Agent.

**1** Click “Add Service Agent”.

# Guide to Manage Service Agent

**1** Enter BRN & Branch Number, then click "Search".

**2** Check the box(es).

**3** Click "Confirm" to proceed.

To add a service agent, the process is basically the same as the previously mentioned process of editing the details of a service agent, which includes entering the Business Registration Number and Branch Number, and checking the box(es) for Appointed Role(s) & Service(s).

Please note that this appointment will supersede any existing appointments for the services selected.

- 1** Enter BRN & Branch Number, then click "Search".
- 2** Check the box(es).
- 3** Click "Confirm" to proceed.

# Guide to Manage Service Agent

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TAXPAYER A  
TAXPAYER A COMPANY LIMITED

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## Manage Service Agent

SC-869-0106

**Acknowledgement**

SERVICE AGENT A LIMITED has been added as the service agent of TAXPAYER A COMPANY LIMITED.

Transaction Reference Number (TRN): 9999 9999 9999 9999

Transaction Date/Time: 7 Apr 2025 16:03:19

**BTP Business**

Business Registration Number: 99999995

Business Name: TAXPAYER A COMPANY LIMITED

**Service Agent Details**

Business Registration Number: 10000000

Business Name: SERVICE AGENT A LIMITED

**Appointed Role(s) & Service(s)**

Tax Representative - Profits Tax Matters

Reference Number (if applicable):

Service Provider - Filing of Profits Tax Return

Reference Number (if applicable):

Please note that the changes of particulars and preferences will generally take 5 working days to become effective. In addition, any notices and documents which are produced by the computer prior to the effective date of changes for issue after such date will not reflect the up-to-date position of such particulars and preferences. Please accept our apology for any inconvenience caused.

1 Print 2 Save 3 Continue

Upon completion of the updating process, acknowledgement will be displayed.

- 1 Click “Print” if you wish to print the acknowledgement.
- 2 Click “Save” if you wish to save the acknowledgement.
- 3 Click “Continue” to view the latest Service Agent records.

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TAXPAYER A COMPANY LIMITED

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## Manage Service Agent

SC-869-0102

Quit

**BTP Business**

Select BTP Business

Business Registration Number: 99999995

Business Name: TAXPAYER A COMPANY LIMITED

**Appointed Service Agent**

Add Service Agent

Search Service Agent

Select Appointed Service(s)

Service Agent T1	Role T1	Appointed Services	Reference Number T1
SERVICE AGENT A LIMITED (BRN: 10000000 - 000)	Tax Representative	Profits Tax Matters	
SERVICE AGENT A LIMITED (BRN: 10000000 - 000)	Service Provider	Filing of Profits Tax Return	
SERVICE AGENT B LIMITED (BRN: 10000001 - 000)	Tax Representative	Certificate of Resident Status	
SERVICE AGENT C LIMITED (BRN: 10000002 - 000)	Company Secretary	Business Registration Matters	

Displaying 4 out of a total of 4 records

Go to page 1 →

1

After clicking the “Select BTP Business”, you will be redirected to the BTP Business List to select another BTP Business.

# Guide to Manage Service Agent

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TAXPAYER A COMPANY LIMITED

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## Manage Service Agent

SC-869-0101

Quit

### Select BTP Business

Search Business Registration Number or Business Name

Business Registration Number	Business Name
<input checked="" type="radio"/> 99999995	TAXPAYER A COMPANY LIMITED
<input type="radio"/> 99999996	TAXPAYER B COMPANY LIMITED

Displaying 2 out of a total of 2 records

Go to page 1 →

Continue

**1** Click “Continue” to switch to that business.



## **Inland Revenue Department**

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