



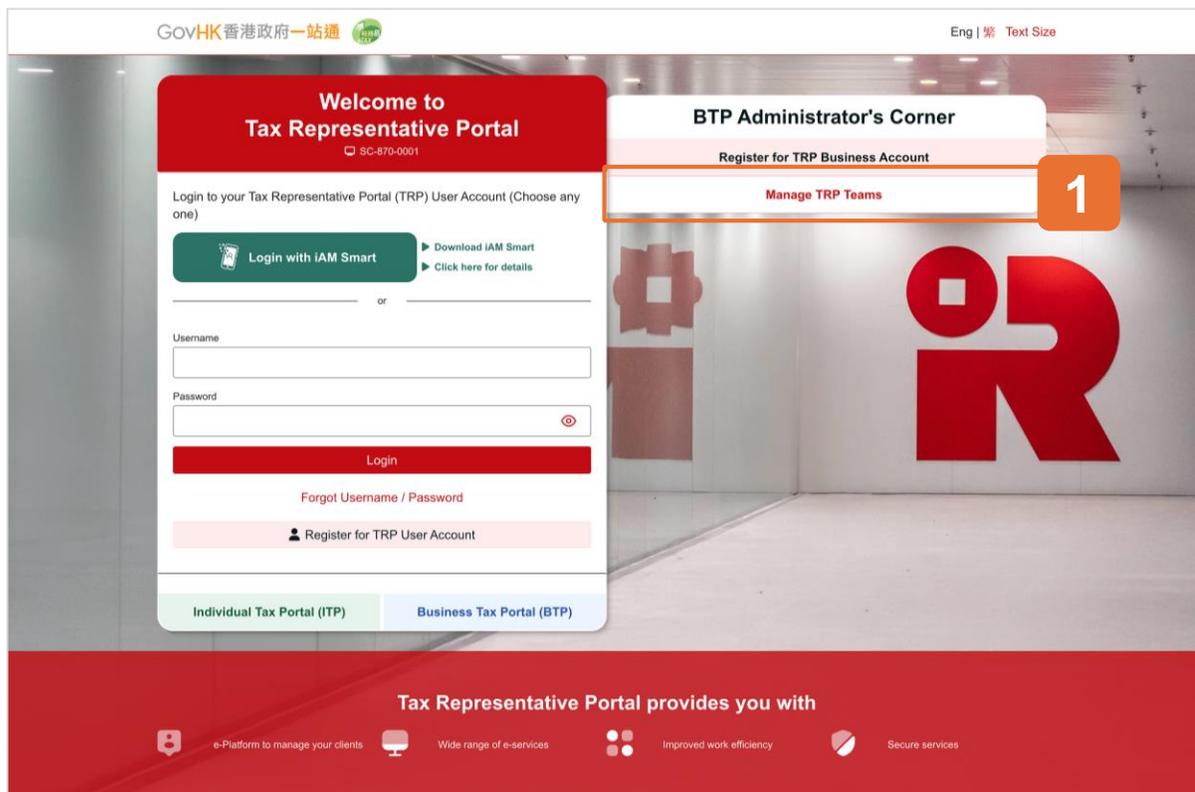
Inland Revenue Department

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



Manage TRP Client (for BTP Administrator and Team Lead)

Guide to Manage TRP Client (for BTP Administrator and Team Lead)



Getting Started

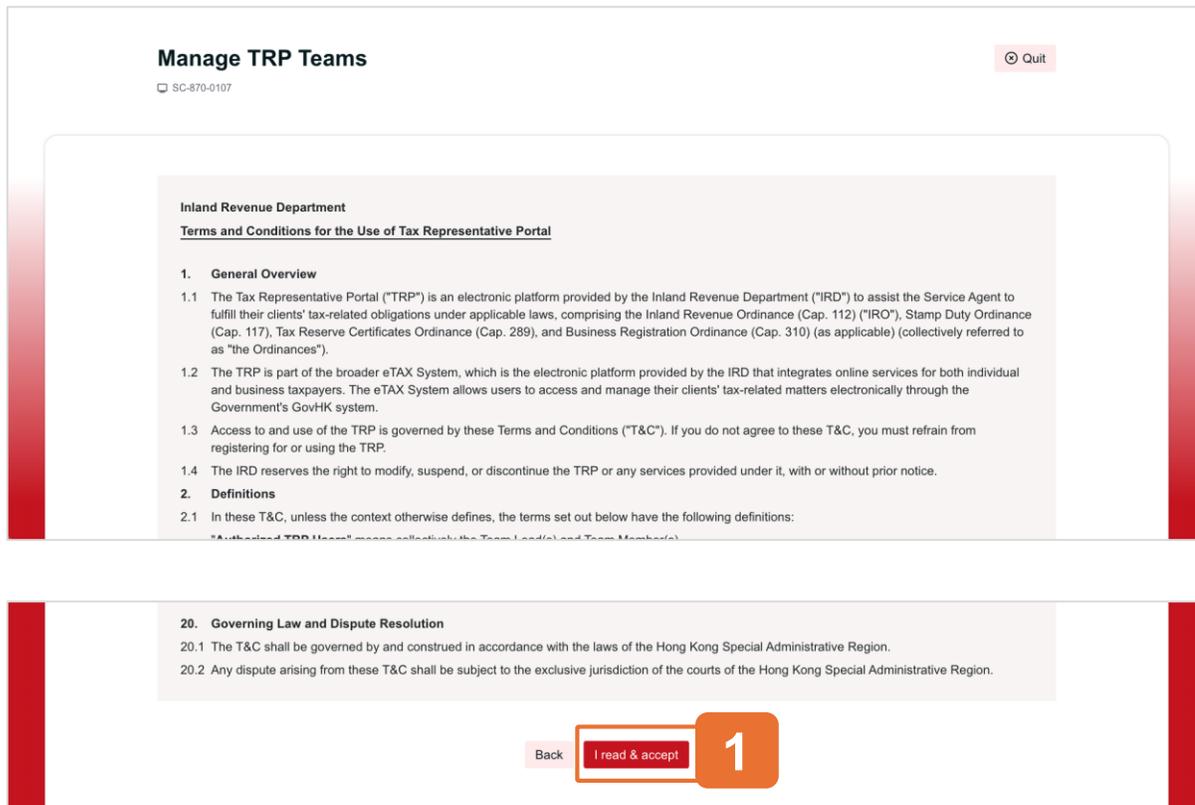
This document will guide you through the process of managing TRP Client for BTP Administrator and TRP Team Lead.

BTP Administrator

If you are a **BTP Administrator** of a registered TRP business, you can manage the client(s) for the TRP business.

1 Click “Manage TRP Teams” to get start.

Guide to Manage TRP Client (for BTP Administrator and Team Lead)



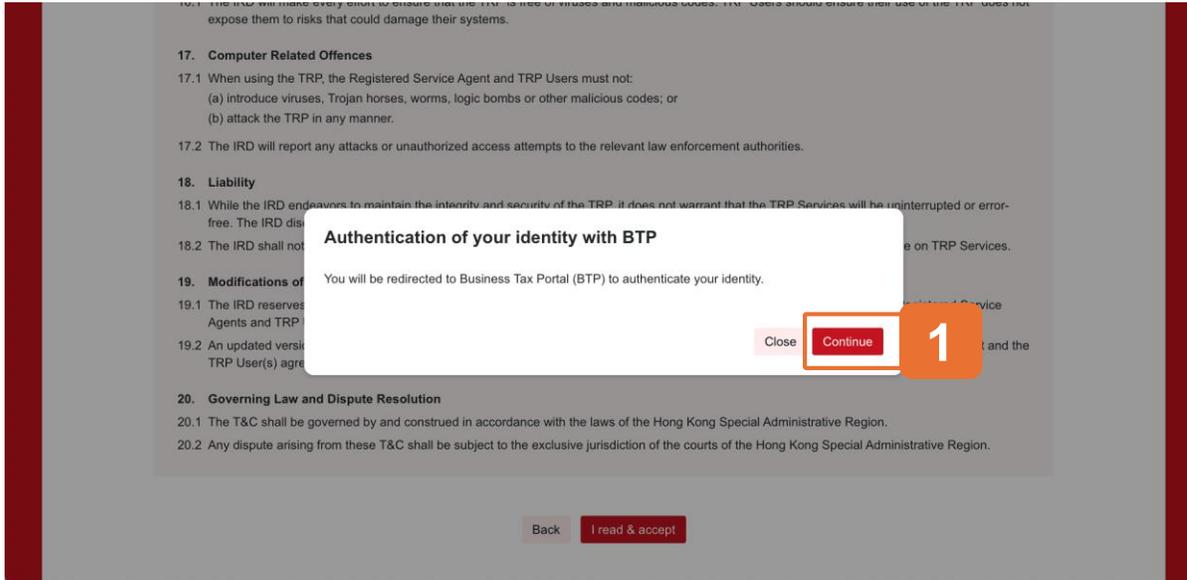
BTP Administrator

Terms and Conditions

The Terms and Conditions for use of the Tax Representative Portal will be displayed for agreement.

- 1 Click the "I read & accept" to proceed.

Guide to Manage TRP Client (for BTP Administrator and Team Lead)



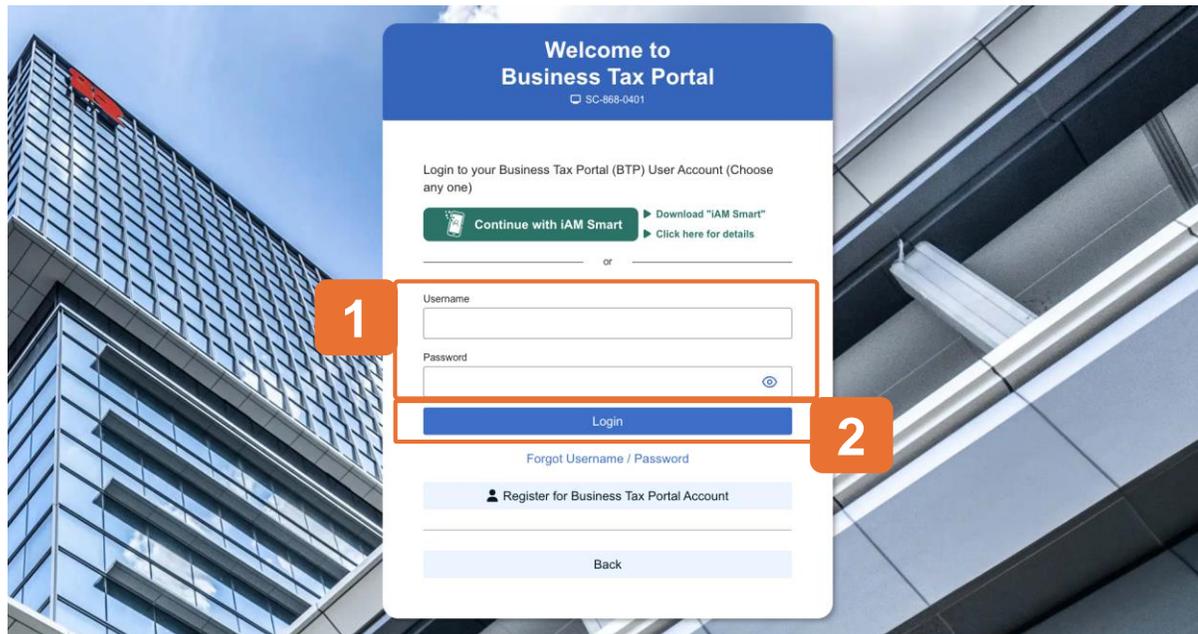
BTP Administrator

Reminder: Authentication of Your Identity

After clicking “Continue”, you will be redirected to Business Tax Portal (BTP) to authenticate your identity.

1 Click the “Continue” to proceed.

Guide to Manage TRP Client (for BTP Administrator and Team Lead)



BTP Administrator

Authentication of Your Identity with BTP

For authentication, please login to your BTP User Account with iAM Smart or enter your BTP Username and Password.

Please note that your TRP User Account is also your BTP User Account. If you have registered as a TRP User Account holder, you can enter your TRP Username and Password for authentication.

- 1 Enter your “BTP Username” and “Password”.
- 2 Click the “Login” button to proceed.

Guide to Manage TRP Client (for BTP Administrator and Team Lead)

Manage TRP Teams

SC-871-0303 Quit

TRP Business

TRP Business Name: SERVICE AGENT A LIMITED

Business Registration Number: 99999995

Select TRP Team

Search Team Name or Name/Other Name of Team Lead

Team Name	Name of Team Lead (Other Name)	No. of Team Members	No. of Clients
TRP Team 1	TAXPAYER, A (User R's other name)	0	0

Displaying 1 out of a total of 1 record Go to page 1

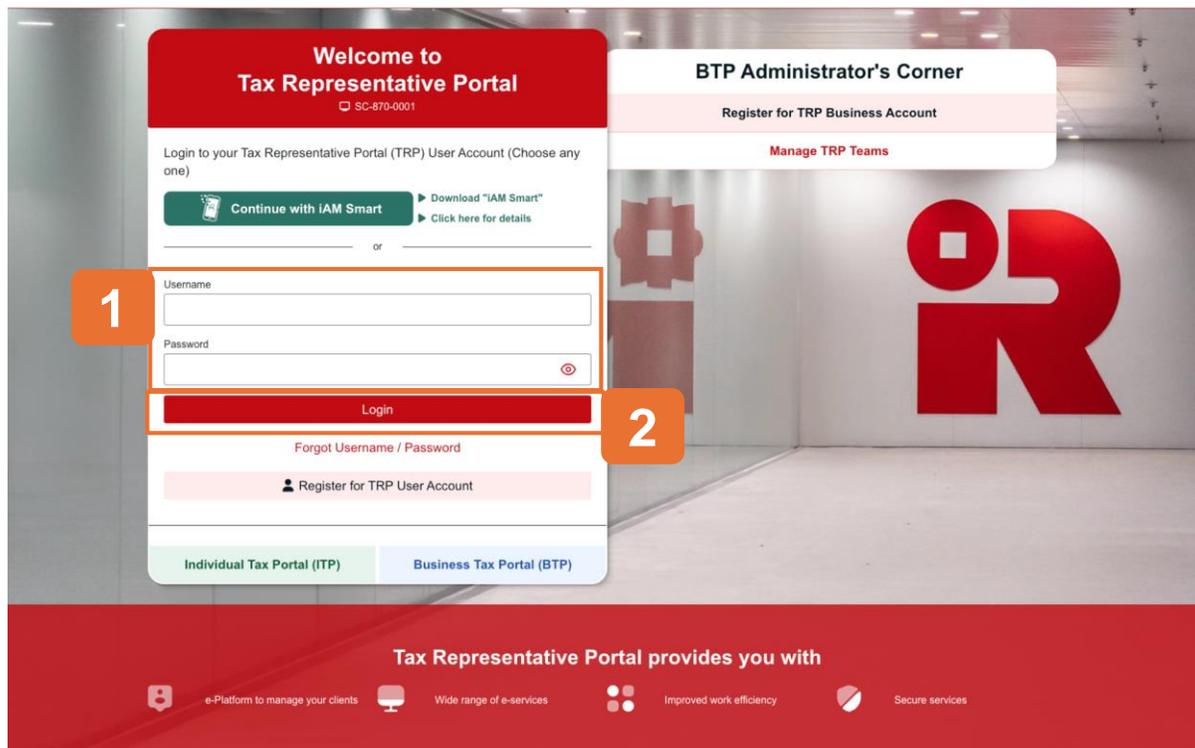
Create New Team Engage Client **1**

BTP Administrator

Please note that before you can engage client(s) and perform TRP services for your client(s), you are required to create at least one TRP Team.

- 1 Click the “Engage Client” to proceed.

Guide to Manage TRP Client (for BTP Administrator and Team Lead)



TRP Team Lead

If you are a **TRP Team Lead**, you can manage the client(s) engagement to the TRP Team(s) under your purview.

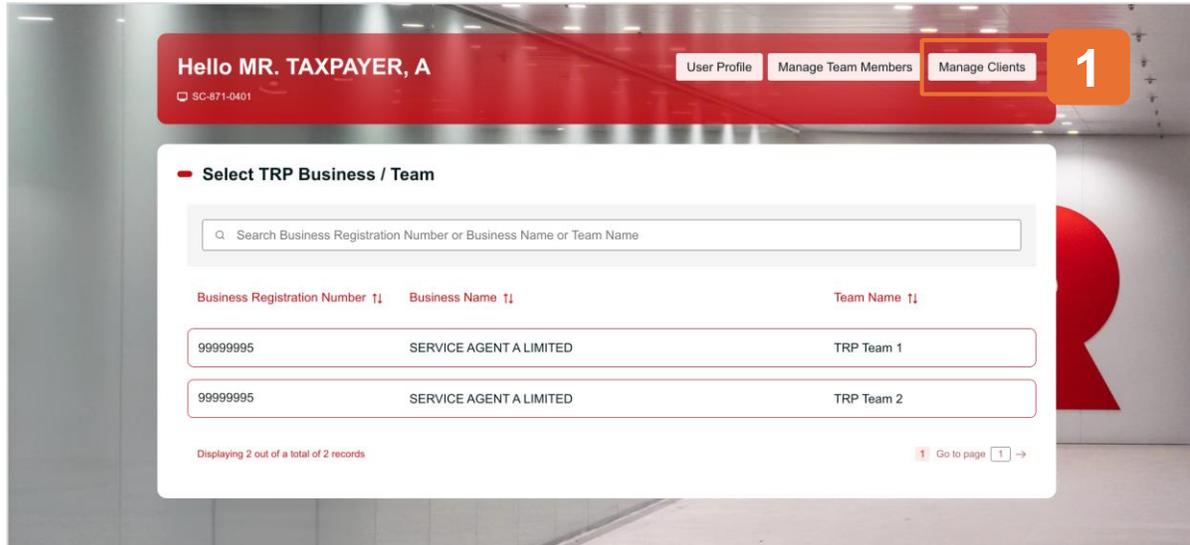
To start, please login to your TRP User Account with iAM Smart or enter TRP Username and Password.

Please note that your TRP User Account is also your BTP User Account. If you have registered as a BTP User Account holder, you can enter your BTP Username and Password for authentication.

1 Enter your “TRP Username” and “Password”.

2 Click the “Login” button to proceed.

Guide to Manage TRP Client (for BTP Administrator and Team Lead)



TRP Team Lead

After login to your TRP User Account,

1

Click the “Manage Clients” to proceed.

Guide to Manage TRP Client (for BTP Administrator and Team Lead)

Manage Clients Quit

SC-871-0102

TRP Business and Team

TRP Business Name:	SERVICE AGENT A LIMITED
Business Registration Number:	99999995
Team Name:	TRP Team 1
Name of Team Lead (Other Name):	TAXPAYER, A (User R's other name)

Clients

Search Client

Client	Appointed Services
No records found	

Displaying 0 out of a total of 0 records Go to page 1 →

[Back](#) [Add Business Registration Client](#) [Engaged as Service Provider in furnishing return](#) **Engage Client** **1**

TRP Team Lead

1

Click “Engage Client” to proceed.

Guide to Manage TRP Client (for BTP Administrator and Team Lead)

Engage Client (Choose either Bulk Upload Function or Online Input)

1 Bulk Upload Function (Upload a CSV file for up to 5,000 clients)

Note:
 (1) You have to prepare a valid ".csv" (comma separated value) file with information of: -
 (i) Client Identification Number (such as, Business Registration Number, Hong Kong Identity Card Number) and
 (ii) Team Name.
 (2) For Client Identification Number, only numeric and/or capital letters is accepted.
 (3) You can upload records for up to 5,000 clients each time.
 (4) See example below for the format of ".csv" file:

```
99999995,TRP Team 1
A000000(3),TRP Team 1
```

CSV File

2 Online Input (Input records for up to 200 clients)

Note:
 (1) For Client Identification Number (such as, Business Registration Number, Hong Kong Identity Card Number), only numeric and/or alphabet is accepted.
 (2) You can input records for up to 200 clients each time.

Search Client Identification Number or Client Name or Team Name

Record No.	Client Identification Number	Client	Team Name
1	<input type="text" value="Please enter"/>	<input type="text"/>	<input type="text" value="TRP Team 1"/>

Insert Rows

Engage Client

Your client(s) can appoint you as “Service Agent” for the relevant tax matters in your client’s Individual Tax Portal (ITP) or Business Tax Portal (BTP); or inform IRD of your appointment as tax representative.

You can engage your client(s)

- 1** By Bulk Upload Function
- 2** By Online Input

Guide to Manage TRP Client (for BTP Administrator and Team Lead)

Engage Client (Choose either Bulk Upload Function or Online Input)

1 Bulk Upload Function (Upload a CSV file for up to 5,000 clients)

Note:
 (1) You have to prepare a valid ".csv" (comma separated value) file with information of: -
 (i) Client Identification Number (such as, Business Registration Number, Hong Kong Identity Card Number) and
 (ii) Team Name.
 (2) For Client Identification Number, only numeric and/or capital letters is accepted.
 (3) You can upload records for up to 5,000 clients each time.
 (4) See example below for the format of ".csv" file:

```
99999995,TRP Team 1
A000000(3),TRP Team 1
```

CSV File **2**

Online Input (Input records for up to 200 clients)

Note:
 (1) For Client Identification Number (such as, Business Registration Number, Hong Kong Identity Card Number), only numeric and/or alphabet is accepted.
 (2) You can input records for up to 200 clients each time.

Search Client Identification Number or Client Name or Team Name

Record No.	Client Identification Number	Client	Team Name
1	<input type="text" value="Please enter"/>	<input type="button" value="Check"/>	<input type="button" value="Select Team"/>

Insert Rows

3

Engage Client – Bulk Upload Function

For Bulk Upload Function, you have to prepare a valid file in “.csv” (common separated value) format with the information of:

- **Client Identification Number** – such as your client’s Business Registration Number or Hong Kong Identity Card Number.
- **Team Name** – the designated TRP Team.

- 1** Turn on the radio button of “Bulk Upload Function”.
- 2** Click “Browse” to upload the CSV file. A file dialog box will then be prompted. Select the “.csv” file for upload and click ‘Open’ to proceed.
- 3** Click “Continue” to proceed.

Guide to Manage TRP Client (for BTP Administrator and Team Lead)

Manage Clients Quit

SC-871-0107

Acknowledgement

MR. TAXPAYER, A has uploaded / inputted total of 2 client record(s). Please note that total number of 1 client record(s) had been engaged successfully and total number of 1 client record(s) are rejected. A list of the errors is attached for taking remedial actions.

Transaction Reference Number (TRN): 9999 9999 9999 9999

Transaction Date/Time: 13 Mar 2025 10:51:59

TRP Business Details

TRP Business Name: SERVICE AGENT A LIMITED

Business Registration Number: 99999995

Details of client engaged successfully:

Client Identification Number	Client	Team Name
999999911	TAXPAYER A COMPANY LIMITED	TRP Team 1

Displaying 1 out of a total of 1 record Go to page 1 →

Details of client cannot be engaged:

Client Identification Number	Team Name	Rejection Reason
QQ1234567	TRP Team 1	No record of appointed role of service. [871-E-1031]

Displaying 1 out of a total of 1 record Go to page 1 →

2 **1**

Print Save **Continue** Download Rejection Report

Engage Client – Bulk Upload Function

Details of the successful engaged client(s) and the details of the client(s) that cannot be engaged will be shown in the acknowledgement page. You can “Print” or “Save” a copy of this acknowledgement page.

If client(s) cannot be engaged, you can download the reject report, which is in ‘csv’ file format.

- 1** Click “Download Rejection Report” to view the details.
- 2** Click “Continue” to view the latest Client List.

Guide to Manage TRP Client (for BTP Administrator and Team Lead)

Engage Client (Choose either Bulk Upload Function or Online Input)

Bulk Upload Function (Upload a CSV file for up to 5,000 clients)

Note:
 (1) You have to prepare a valid ".csv" (comma separated value) file with information of: -
 (i) Client Identification Number (such as, Business Registration Number, Hong Kong Identity Card Number) and
 (ii) Team Name.
 (2) For Client Identification Number, only numeric and/or capital letters is accepted.
 (3) You can upload records for up to 5,000 clients each time.
 (4) See example below for the format of ".csv" file:

```
99999995,TRP Team 1
A000000(3),TRP Team 1
99999995,TRP Team 2
A000000(3),TRP Team 2
```

CSV File

1 Online Input (Input records for up to 200 clients)

Note:
 (1) For Client Identification Number (such as, Business Registration Number, Hong Kong Identity Card Number), only numeric and/or alphabet is accepted.
 (2) You can input records for up to 200 clients each time.

Record No.	Client Identification Number	Client	Team Name
1	<input type="text" value="Please enter"/> <input type="button" value="Check"/>		<input type="text" value="Select Team"/>

Insert Rows

3

Engage Client – Online Input

For Online Input, you have to

- Enter **Client Identification Number** – such as your client’s Business Registration Number or Hong Kong Identity Card Number.
- Select **Team Name** – the designated TRP Team.

Please note that, if you are the Team Lead of one TRP Team only, you are not required to select the Team Name.

- 1** Turn on the radio button of “Bulk Upload Function”.
- 2** Enter “Client Identification Number” and click “Check”.
- 3** Click “Continue” to proceed.

Guide to Manage TRP Client (for BTP Administrator and Team Lead)

Acknowledgement

MR. TAXPAYER, A has uploaded / inputted total of 2 client record(s). Please note that total number of 1 client record(s) had been engaged successfully and total number of 1 client record(s) are rejected. A list of the errors is attached for taking remedial actions.

Transaction Reference Number (TRN): 9999 9999 9999 9999

Transaction Date/Time: 13 Mar 2025 10:51:59

TRP Business Details

TRP Business Name: SERVICE AGENT A LIMITED

Business Registration Number: 99999995

Details of client engaged successfully:

Client Identification Number	Client	Team Name
999999911	TAXPAYER A COMPANY LIMITED	TRP Team 1

Displaying 1 out of a total of 1 record 1 Go to page 1 →

Details of client cannot be engaged:

Client Identification Number	Team Name	Rejection Reason
QQ1234567	TRP Team 1	No record of appointed role of service. [871-E-1031]

Displaying 1 out of a total of 1 record 1 Go to page 1 →

Print Save Continue Download Rejection Report

Engage Client – Online Input

Details of the successful engaged client(s) and the details of the client(s) that cannot be engaged will be shown in the acknowledgement page. You can ‘Print’ or ‘Save’ a copy of this acknowledgement page.

If client(s) cannot be engaged, you can download the reject report, which is in ‘csv’ file format.

- 1 Click “Download Rejection Report” to view the details.
- 2 Click “Continue” to view the latest Client List.

Guide to Manage TRP Client (for BTP Administrator and Team Lead)

Manage Clients Quit

SC-871-0102

TRP Business and Team

TRP Business Name: SERVICE AGENT A LIMITED

Business Registration Number: 99999995

Team Name: TRP Team 1

Name of Team Lead (Other Name): TAXPAYER, A (User R's other name)

Clients

Search Client

Client ID	Appointed Services
TAXPAYER A COMPANY LIMITED (99999911)	<ul style="list-style-type: none"> Profits Tax Matters - Tax Representative Profits Tax Matters - Service Provider

Displaying 1 out of a total of 1 record Go to page 1

Back Add Business Registration Client Engaged as Service Provider in furnishing return **Engage Client**

Engage Client

The Client List in the TRP Team has been updated.

The “Appointed Services” shows the scope of service(s) assigned to the TRP Team within the service(s) appointed by the designated client.

- 1 Click the record of a particular client, and you will be redirected to another page to see the Client Details.

Guide to Manage TRP Client (for BTP Administrator and Team Lead)

TRP Business and Team

TRP Business Name: SERVICE AGENT A LIMITED

Business Registration Number: 99999995

Team Name: TRP Team 1

Name of Team Lead (Other Name): TAXPAYER, A (User R's other name)

Client Information

Client: TAXPAYER A COMPANY LIMITED

Client Identification Number: 99999911

Services

Service	Status	Reference Number
Profits Tax Matters - Tax Representative	Appointed	
Profits Tax Matters - Service Provider	Appointed	
Business Registration Matters	Not appointed	
Certificate of Resident Status	Not appointed	

Displaying 4 out of a total of 4 records

1 Go to page 1 →

1

Back Remove Client from the Team Disengagement of Client

Client Details

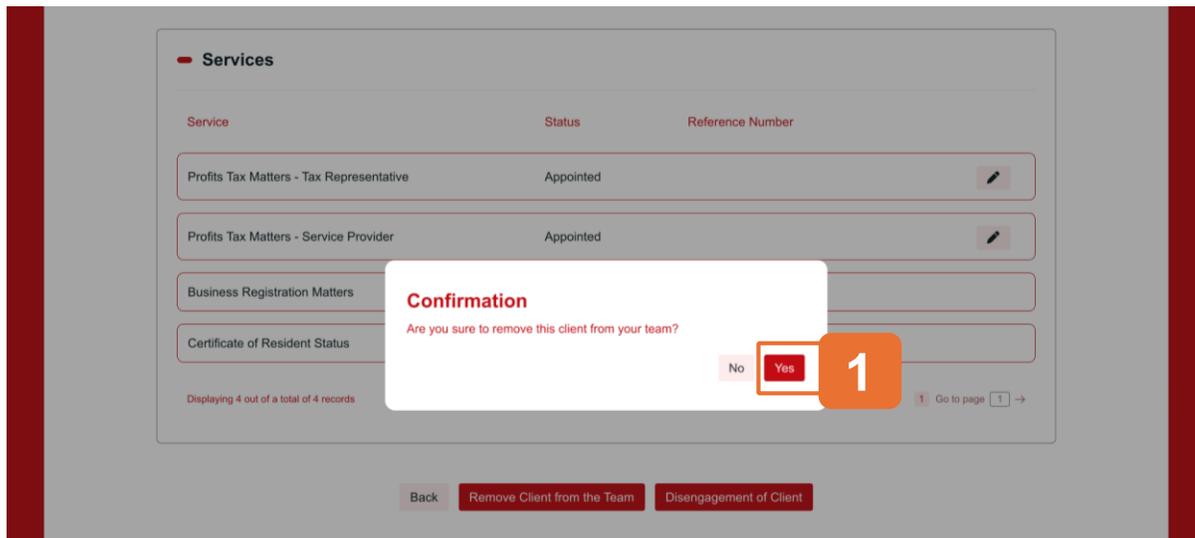
For the same client, it can be engaged by only one TRP Team of the TRP business for an appointed service.

If you need to remove the client from current assigned TRP Team, click “Remove Client from the Team”.

1

Click “Remove Client from the Team” to remove client from current TRP Team.

Guide to Manage TRP Client (for BTP Administrator and Team Lead)



Remove Client from TRP Team

A confirmation pop up box will be prompted, you can click “Yes” to proceed.

- 1 Click “Yes” to proceed

Guide to Manage TRP Client (for BTP Administrator and Team Lead)

Manage Clients Quit

SC-871-0107

Acknowledgement

MR. TAXPAYER, A, you have successfully removed TAXPAYER A COMPANY LIMITED from your TRP Team.

Transaction Reference Number (TRN): 9999 9999 9999 9999

Transaction Date/Time: 13 Mar 2025 12:15:34

TRP Business Details

TRP Business Name: SERVICE AGENT A LIMITED

Business Registration Number: 99999995

TRP Team Details

Team Name: TRP Team 1

Name of Team Lead (Other Name): TAXPAYER, A (User R's other name)

Removed Client Details

Client: TAXPAYER A COMPANY LIMITED

Client Identification Number: 99999911

Print Save Continue **1**

Remove Client from TRP Team

You have successfully removed the client from the TRP Team. You can choose to “Print” or “Save” a copy of this acknowledgement.

1 Click “Continue” to view the latest Client List.

Guide to Manage TRP Client (for BTP Administrator and Team Lead)

The screenshot displays the 'Manage Clients' interface. At the top left, it says 'Manage Clients' with a sub-identifier 'SC-871-0102' and a 'Quit' button. The main content is divided into two sections:

- TRP Business and Team:** A table with the following details:

TRP Business Name:	SERVICE AGENT A LIMITED
Business Registration Number:	99999995
Team Name:	TRP Team 1
Name of Team Lead (Other Name):	TAXPAYER, A (User R's other name)
- Clients:** A section with a search bar labeled 'Search Client'. Below it, there is a table header with 'Client ID' and 'Appointed Services'. The table body is empty, showing 'No records found'. At the bottom of this section, it says 'Displaying 0 out of a total of 0 records' and 'Go to page 1 →'.

At the bottom of the interface, there are four buttons: 'Back', 'Add Business Registration Client', 'Engaged as Service Provider in furnishing return', and 'Engage Client'.

Remove Client from TRP Team

The Client List of the TRP Team has been updated.

Guide to Manage TRP Client (for BTP Administrator and Team Lead)

TRP Business and Team

TRP Business Name: SERVICE AGENT A LIMITED

Business Registration Number: 99999995

Team Name: TRP Team 1

Name of Team Lead (Other Name): TAXPAYER, A (User R's other name)

Client Information

Client: TAXPAYER A COMPANY LIMITED

Client Identification Number: 99999911

Services

Service	Status	Reference Number
Profits Tax Matters - Tax Representative	Appointed	
Profits Tax Matters - Service Provider	Appointed	
Business Registration Matters	Not appointed	
Certificate of Resident Status	Not appointed	

Displaying 4 out of a total of 4 records 1 Go to page →

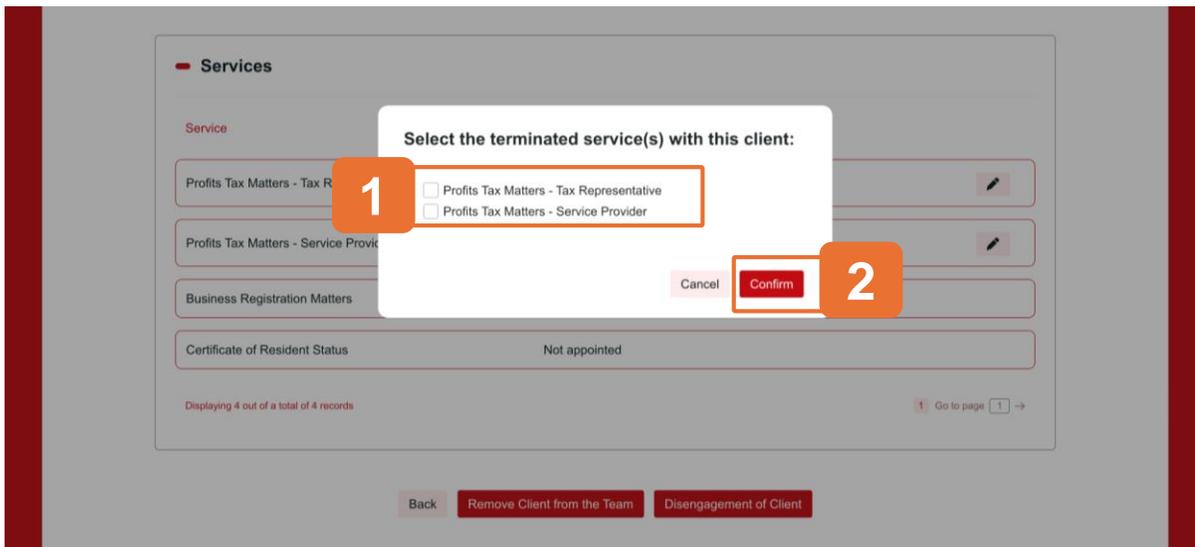
Back
Remove Client from the Team
Disengagement of Client
1

Disengagement of Clients

You are reminded that once the disengagement has been updated, you cannot engage this client again, unless the client has re-appointed you as the service agent.

- 1 Click “Disengagement of Client” to terminate the appointed service(s) with your client.

Guide to Manage TRP Client (for BTP Administrator and Team Lead)

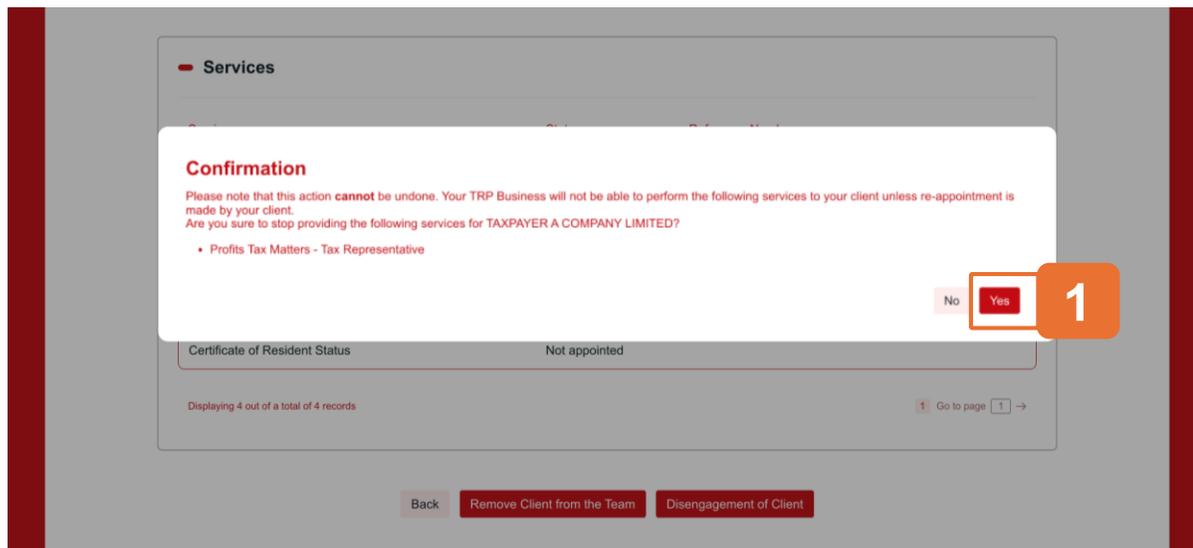


Disengagement of Clients

A pop up “Select the terminated service(s) with this client” will be prompted.

- 1 Select the checkbox(es) for the service(s) to be terminated.
- 2 Click “Confirm”.

Guide to Manage TRP Client (for BTP Administrator and Team Lead)



Disengagement of Clients

A confirmation pop up box will be prompted, you can click “Yes” to proceed.

1 Click “Yes” to proceed.

Guide to Manage TRP Client (for BTP Administrator and Team Lead)

Manage Clients

SC-871-0107 Quit

Acknowledgement

MR. TAXPAYER, A, you have successfully terminated the service(s) provided to TAXPAYER A COMPANY LIMITED from your TRP Team.

Transaction Reference Number (TRN):	9999 9999 9999 9999
Transaction Date/Time:	13 Mar 2025 12:22:27

TRP Business Details

TRP Business Name:	SERVICE AGENT A LIMITED
Business Registration Number:	99999995

TRP Team Details

Team Name:	TRP Team 1
Name of Team Lead (Other Name)	TAXPAYER, A (User R's other name)

Deleted Client Details

Client:	TAXPAYER A COMPANY LIMITED
Client Identification Number:	99999911
Terminated Services:	Profits Tax Matters - Tax Representative

Print Save Continue **1**

Disengagement of Clients

You have successfully terminated the service(s) provided to the client. You can choose to “Print” to “Save” this acknowledgement.

1 Click “Continue” to view the latest Client List.

Guide to Manage TRP Client (for BTP Administrator and Team Lead)

Manage Clients Quit

SC-871-0102

TRP Business and Team

TRP Business Name:	SERVICE AGENT A LIMITED
Business Registration Number:	99999995
Team Name:	TRP Team 1
Name of Team Lead (Other Name):	TAXPAYER, A (User R's other name)

Clients

Search Client

Client ↑	Appointed Services
TAXPAYER A COMPANY LIMITED (99999911)	Profits Tax Matters - Service Provider

Displaying 1 out of a total of 1 record Go to page 1 →

Back Add Business Registration Client Engaged as Service Provider in furnishing return Engage Client

Disengagement of Clients

The Client List in the TRP Team has been updated. You can continue to manage the client(s) for the TRP business.



Inland Revenue Department

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

