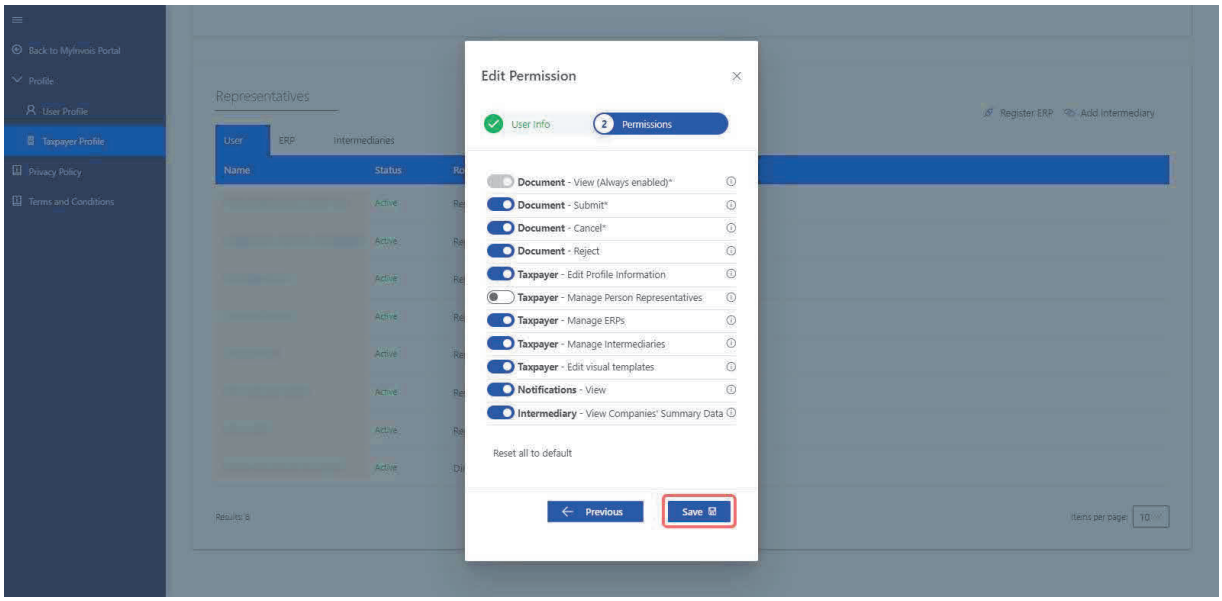
View and Register ERP

This guide provides a step-by-step process for end user on the process of viewing existing system representatives associated with their account and registering new ones within the MyInvois Portal. End Users will be able to provide access to system representatives to act on their behalf within the system.

Step By Step Guide

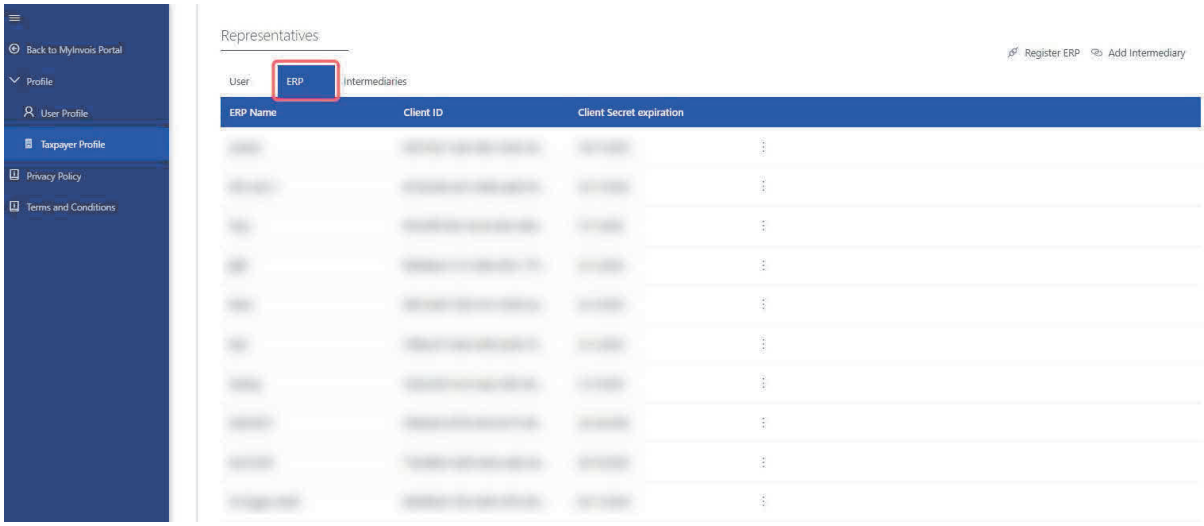
Step 1: Access the Taxpayer Profile

- On the top-right corner of the MyInvois Portal, locate the profile dropdown menu. From the options available, choose **View Taxpayer profile** to access the taxpayer's profile.



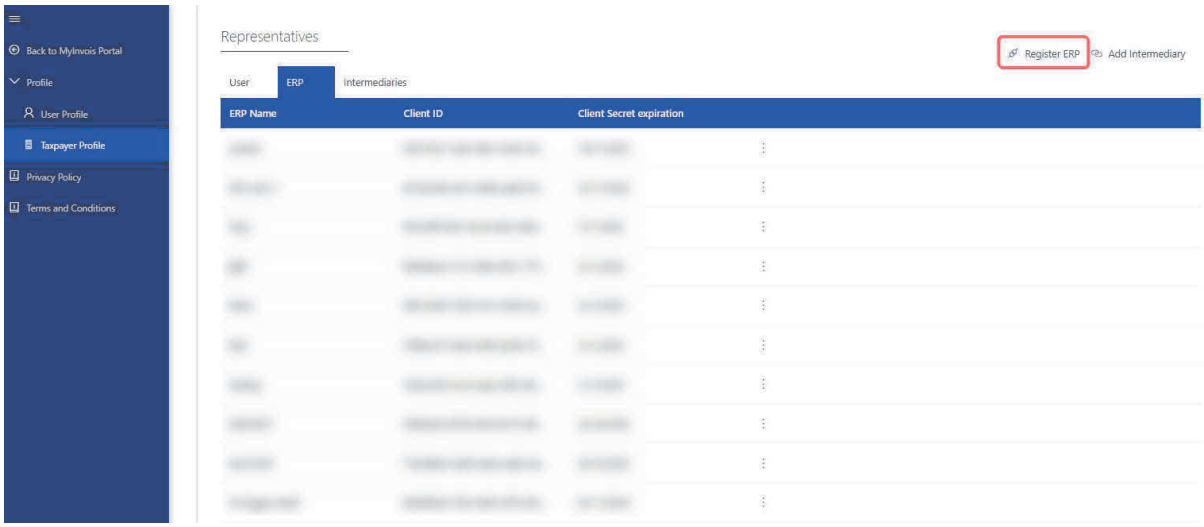
Step 2: View System Representatives

- Scroll down on the Taxpayer Profile page and click on the **ERP** tab under Representatives to view the system representatives.



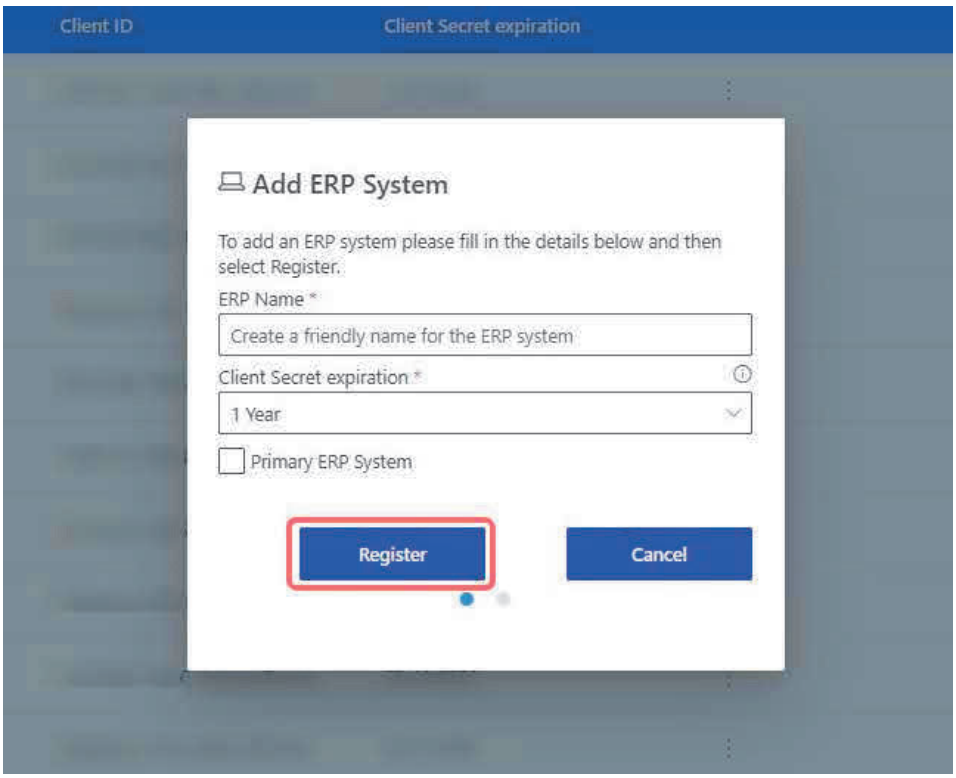
Step 3: Register System Representatives

- On the top-right hand side of the MyInvois Portal on the ERP tab under Representatives, click on **Register ERP** to register a new System Representative.



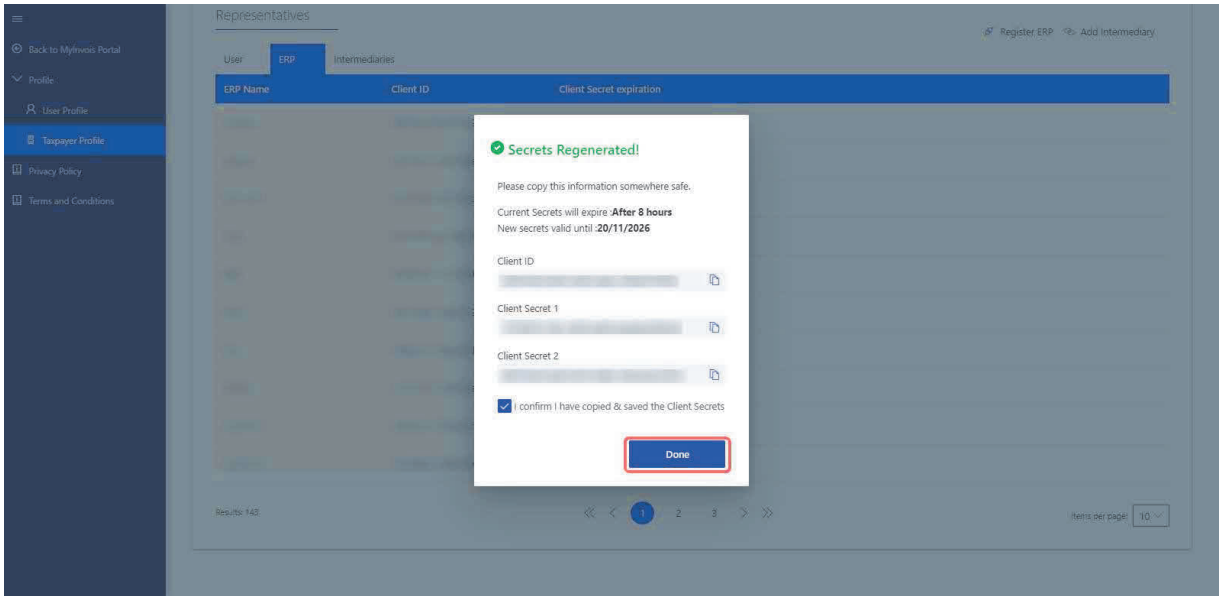
Step 4: Add Input Details and Register

- Input ERP Name and select duration of Client Secret expiration.
- **Primary ERP** system is the main ERP system for the Company.
- Click on **Register** button.



Step 5: Save the New Secrets

- Copy the Client ID and Client Secrets displayed and check the box to confirm that you have copied, then click on **Done**.



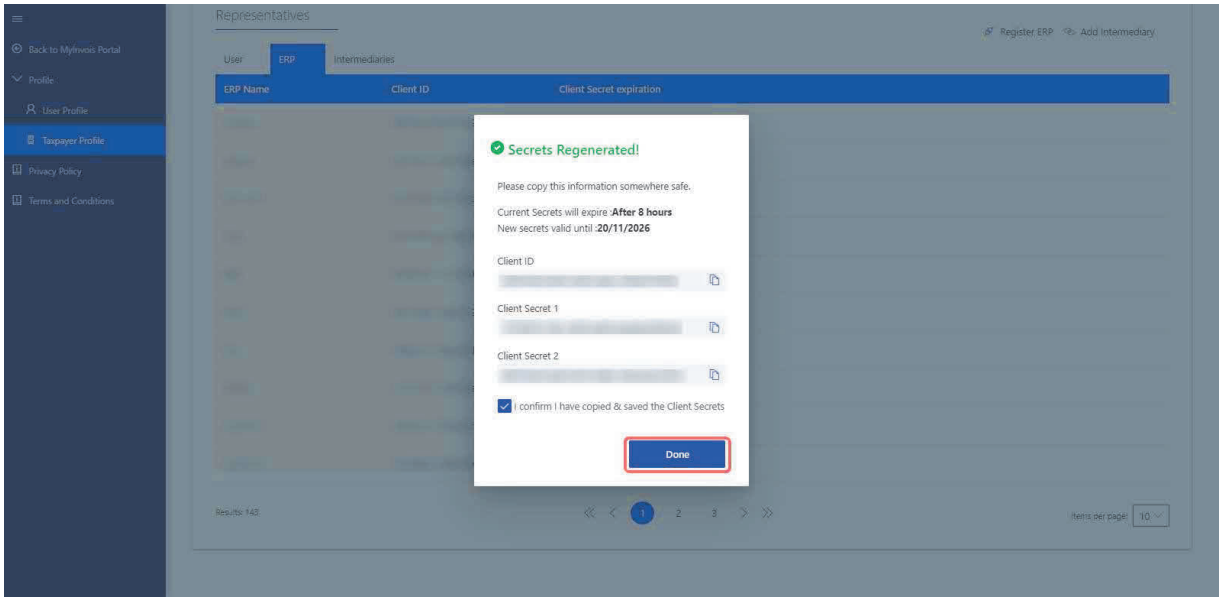
Manage ERP

This guide provides users the process of managing the credentials for system representatives authorized to access the MyInvois Portal on their behalf. This provides a detailed, step-by-step walkthrough for users to navigate to the MyInvois Portal, log in, and access the credentials management section. It is designed to assist users in adding new system representatives, editing the credentials of existing representatives, or revoking access for representatives no longer authorized. This guide ensures that users can maintain secure and controlled access to their tax-related information, allowing only authorized representatives to perform actions within the portal on their behalf.

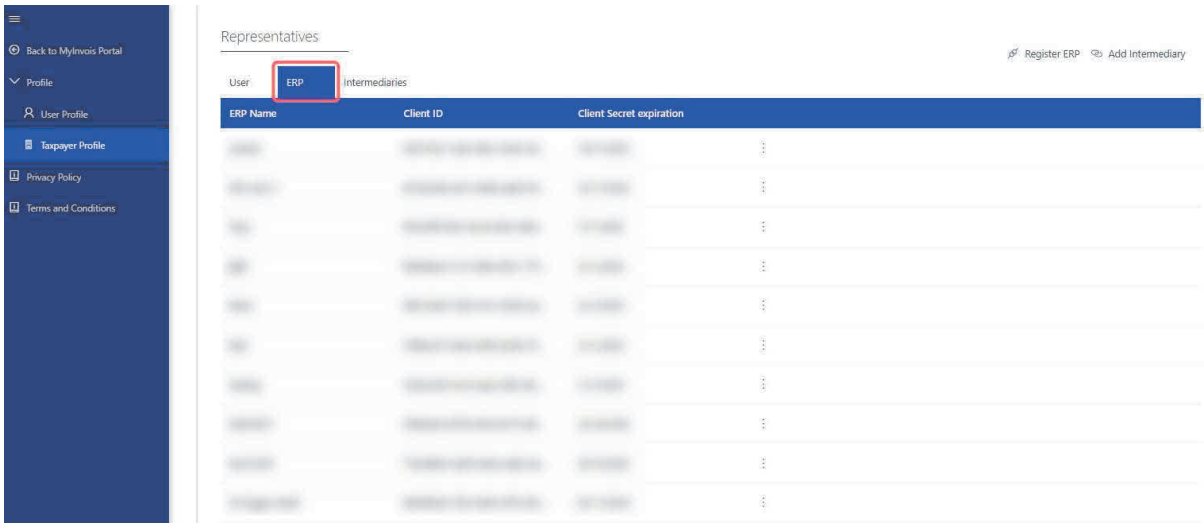
Step By Step Guide

Step 1: Access the Taxpayer Profile

- On the top-right corner of the MyInvois Portal, locate the profile dropdown menu. From the options available, choose **View Taxpayer profile** to access the taxpayer's profile.

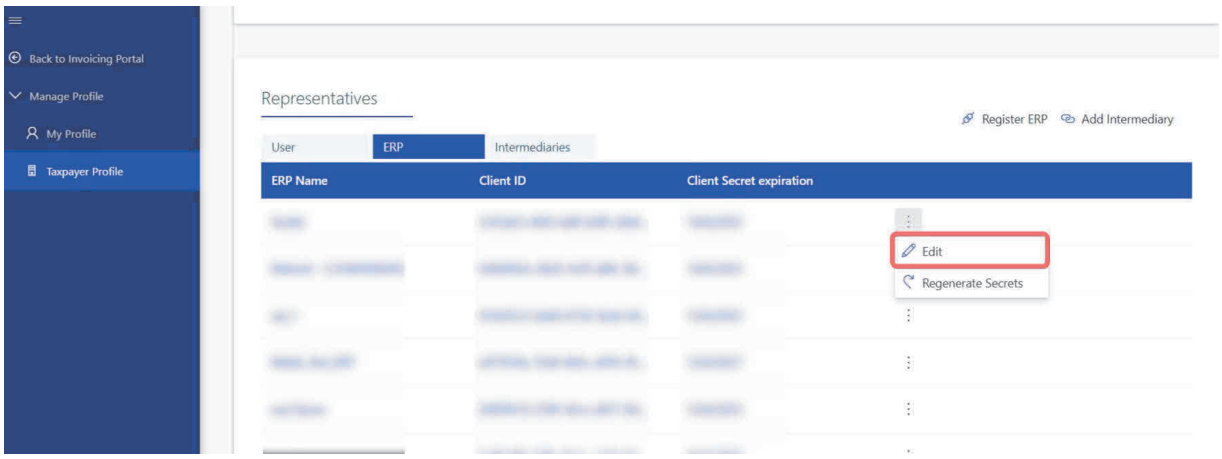


- This step grants you access to view the taxpayer's profile information.

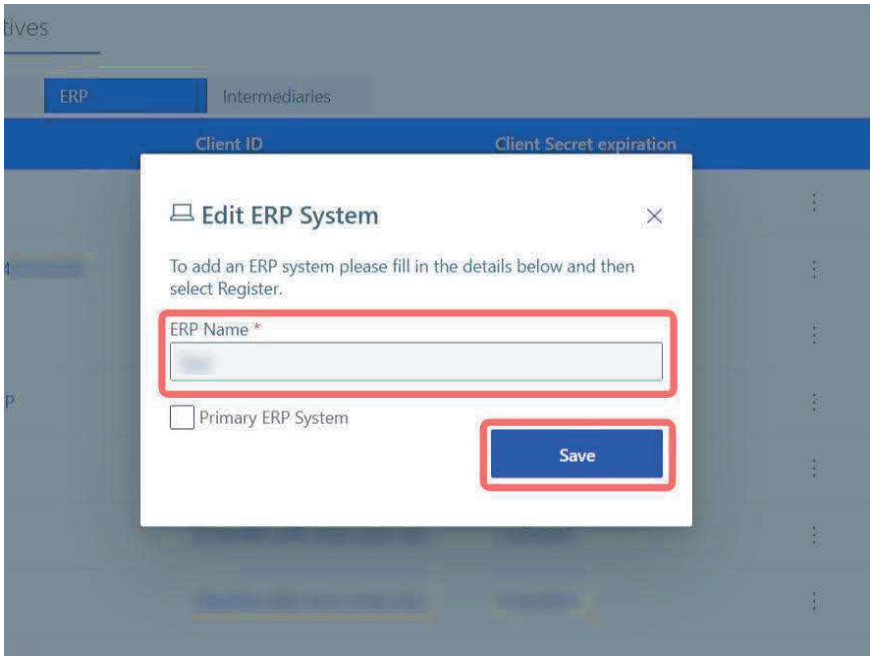


Step 2: Edit ERP

- On the ERP row, click **Edit**

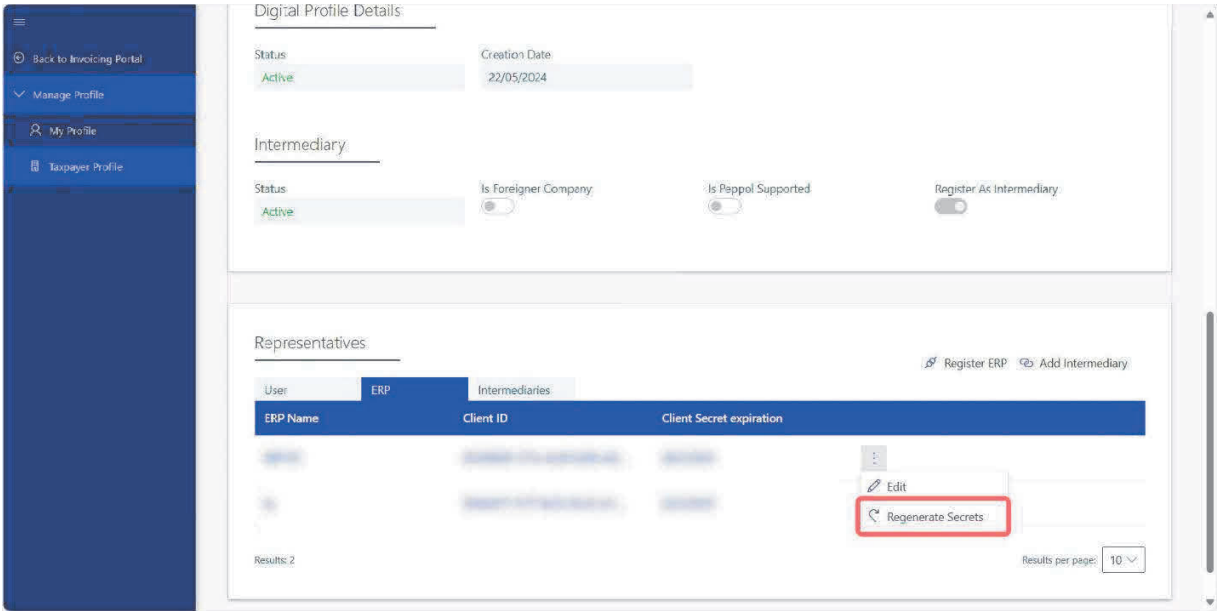


- Update ERP Name.
- Click on **Save**.



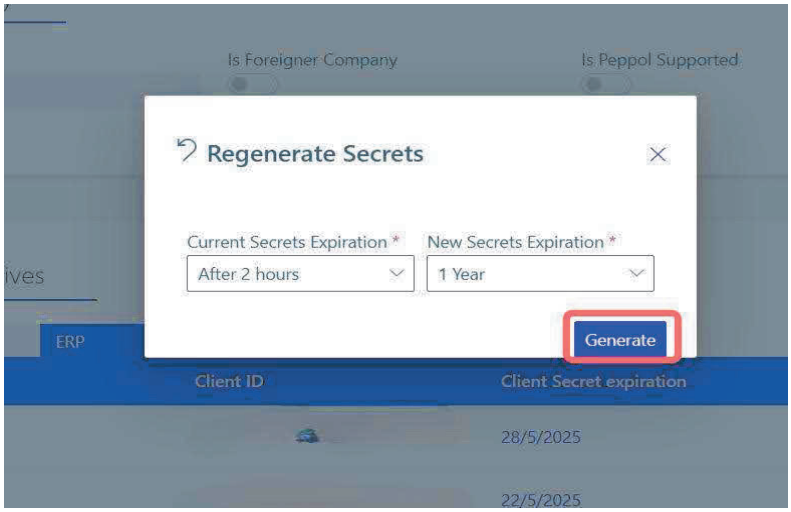
Step 3: Regenerate Secrets

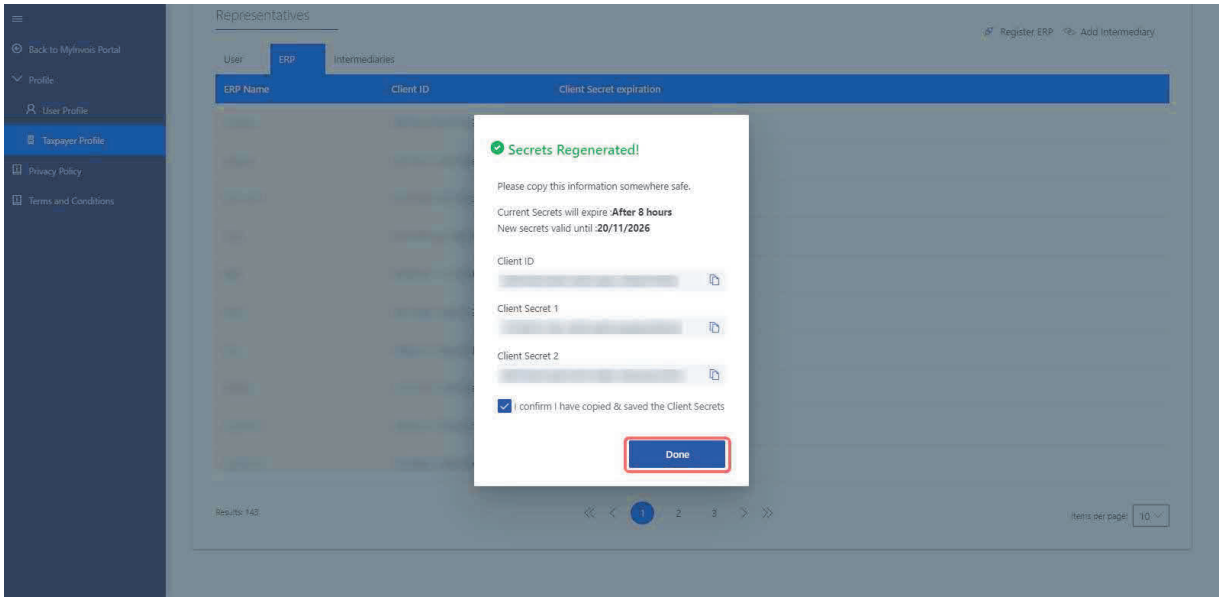
- On the ERP row, click **Regenerate** Secrets.



Step 4: Configure Secrets Expiration and Generate

- Select the current and new Secrets Expiration time, then click on **Generate** button.



Step 5: Save the New Secrets

- Copy the new client Id and Client secrets displayed and check the box to confirm that you have copied, then click on **Done**.