

# Zoho Books – Advintek LHDN MyInvois Integration

## 1. Introduction

The **Advintek LHDN MyInvois integration for Zoho Books** enables Malaysian businesses to validate and submit invoices created in Zoho Books directly to **LHDN MyInvois**, the official e-Invoicing platform of the Government of Malaysia.

This integration eliminates the need for manual invoice exports. Customer and invoice data are securely fetched from Zoho Books into Advintek Invoice Factory, where invoices are validated and automatically submitted to LHDN MyInvois.



## 2. Prerequisites

Before using this integration, the user must ensure that:

- The user has an **active Zoho Books account**
- At least **one Organization** is created in Zoho Books
- Customers are created under the Zoho Books organization
- Invoices are created for those customers
- The user has access to the **Advintek Invoice Factory portal**
- Required business details for LHDN MyInvois compliance are available, including like:
  - Business Registration Number (BRN)
  - Tax Identification Number (TIN) etc.,

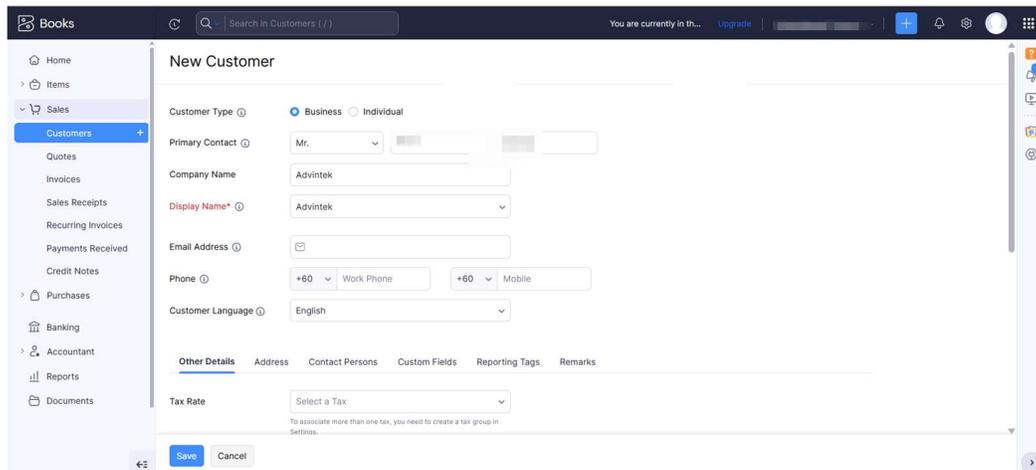
### 3. Creating Customers and Invoices in Zoho Books

To prepare invoices for submission to LHDN MyInvois, the user must first create customers and invoices in Zoho Books.

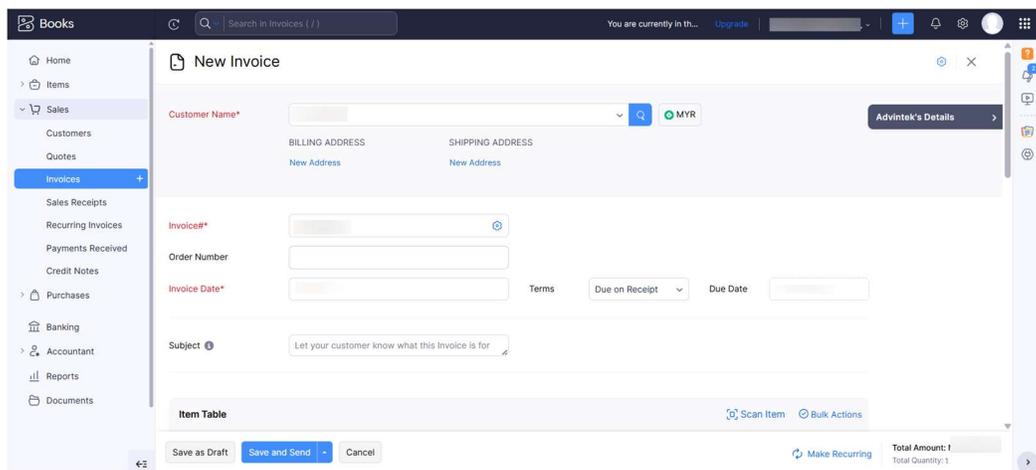
Steps:

1. Log in to Zoho Books
2. Select or create an organization
3. Create customers under the selected organization
4. Create invoices for those customers
5. Ensure invoice details such as items, tax, and total amounts are completed

These invoices will later be fetched into Advintek for validation and submission.



The screenshot shows the 'New Customer' form in Zoho Books. The form is divided into several sections: 'Customer Type' (Business selected), 'Primary Contact' (Mr.), 'Company Name' (Advintek), 'Display Name' (Advintek), 'Email Address', 'Phone' (+60 Work Phone and +60 Mobile), and 'Customer Language' (English). Below these is the 'Other Details' section with tabs for Address, Contact Persons, Custom Fields, Reporting Tags, and Remarks. A 'Tax Rate' dropdown is set to 'Select a Tax'. At the bottom, there are 'Save' and 'Cancel' buttons.



The screenshot shows the 'New Invoice' form in Zoho Books. The form includes a 'Customer Name' dropdown (Advintek's Details), 'BILLING ADDRESS' and 'SHIPPING ADDRESS' fields (both set to 'New Address'), 'Invoice#' field, 'Order Number' field, 'Invoice Date' field, 'Terms' dropdown (Due on Receipt), and 'Due Date' field. There is also a 'Subject' field with the placeholder text 'Let your customer know what this Invoice is for'. Below the form is an 'Item Table' section with 'Scan Item' and 'Bulk Actions' links. At the bottom, there are 'Save as Draft', 'Save and Send', and 'Cancel' buttons, along with a 'Make Recurring' button and a 'Total Amount: 1' summary.

## 4. Accessing the Advintek Integration from Zoho Marketplace

To access the integration:

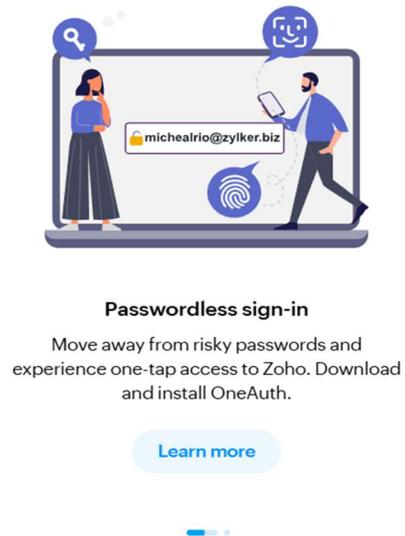
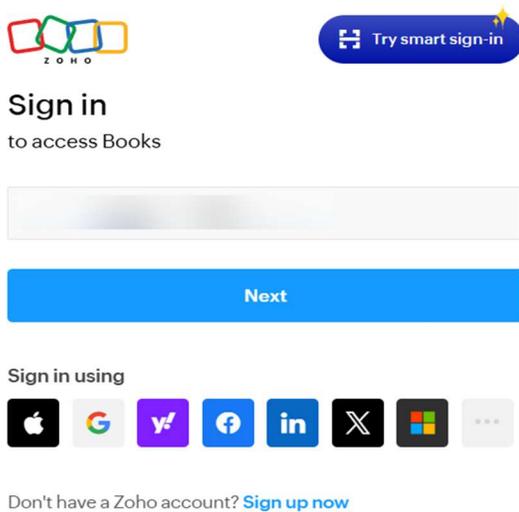
1. Navigate to **Zoho Marketplace**
2. Search for **LHDN MyInvois for Zoho Books**
3. Open the extension listing
4. Click **Visit Website** or **Continue with Zoho Books login**

## 5. Logging in to Advintek Using Zoho Books

From the Advintek landing page:

1. Click **Sign in with Zoho Books**
2. The user is redirected to the Zoho login page
3. Enter Zoho Books credentials to continue

The user will be redirected to the Consent page.



## 6. Granting Consent to Advintek

After successful login, Zoho displays a consent screen requesting permission for Advintek to access Zoho Books data.

The user must:

1. Review the requested permissions, including:
  - a. Access to Zoho account information
  - b. Access and management of Zoho Books data
2. Select **I allow Advintek Services**
3. Click **Accept**

This authorization allows Advintek to securely fetch organization, customer, and invoice data from Zoho Books.



### Advintek Services

Advintek Services would like to access the following information.



#### Accounts

- Link with Zoho account
- Get the primary email address associated with your account
- Get the profile information of your account



#### Books

- Access and manage all your Zoho Books data.
- CREATE View and manage Accounts.
- UPDATE View and manage Accounts.
- READ View and manage Accounts.

I allow Advintek Services to access the above data from my Zoho account..

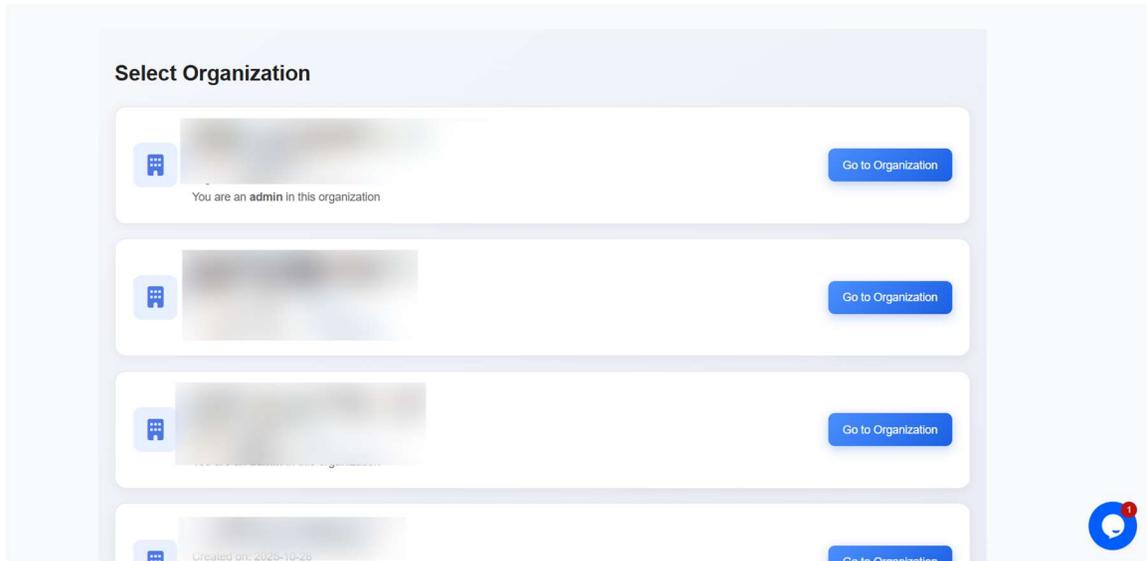
Accept

Reject

## 7. Selecting Zoho Books Organization

If the Zoho Books account contains multiple organizations:

1. The user is redirected to the **Organization Selection** screen
2. The required organization is selected
3. Click **Go to Organization**



The user is then redirected to the Advintek Dashboard.

## 8. Completing Organization Details in Advintek

Before invoices can be submitted to LHDN MyInvois, organization details must be completed in Advintek.

Steps:

1. Navigate to **Company / Organization Details** in Advintek
2. Enter mandatory information such as:
  - a. Business Registration Number (BRN)
  - b. Director Identification Number (DIN)
  - c. Other required business details
3. Save the organization details

These details are mandatory for LHDN MyInvois compliance.

The screenshot shows the 'Participant' registration form in the Invoice Factory application. The form is titled 'Good Afternoon, [User Name]' and includes a 'Need help?' link. The form fields are organized into two columns:

- Left Column:**
  - Participants Type \* (Dropdown: Customer)
  - Email \*
  - ID Type \*
  - Phone \*
  - Address Line 1
  - Country \* (Dropdown: MALAYSIA)
  - City \* (Text: Kuala Lumpur)
- Right Column:**
  - Registration Name \* (Text: Advintek)
  - Tax Identifier (TIN) \*
  - ID Value \*
  - Address Line 0 \*
  - Address Line 2
  - State \* (Dropdown: Selangor)
  - Postal Zone \*

A sidebar on the left contains navigation options: Dashboard, Connection, Company, Participant, Reports, eInvoice Outgoing/AR, Documents, Subscription, Tax Configuration, Contact Us, and Log Out. A chat icon with a notification badge is visible in the bottom right corner.

## 9. Fetching Customers (Participants) from Zoho Books

To fetch customers from Zoho Books:

1. Navigate to **Participants** in Advintek
2. Click **Get Participants**
3. Customers from the selected Zoho Books organization are automatically fetched into Advintek

The screenshot shows the 'Manage Participants' page in the Invoice Factory application. The page title is 'Good Afternoon, [User Name]' and includes a 'Need help?' link. The page features a sidebar with navigation options: Dashboard, Connection, Company, Participant, Reports, eInvoice Outgoing/AR, Documents, Subscription, Tax Configuration, Contact Us, and Log Out. The main content area is titled 'Manage Participants' and includes a '+ New Participant' button and a 'Get Participants' button. Below the buttons is a table with columns: TIN, Type, Value, Email, Status, Pull Invoices, and Action. The table contains five rows, with the first four rows having a 'Pending' status and the fifth row having a 'Completed' status. A search bar is located above the table. A pagination bar at the bottom shows '1 of 1 pages (5 items)' and '10 Items per page'. A dropdown menu is open over the 'Pull Invoices' button of the 'Completed' row, showing options for 'Invoice' and 'Credit Note'. A chat icon with a notification badge is visible in the bottom right corner.

TIN	Type	Value	Email	Status	Pull Invoices	Action
				Pending	Pull Invoices	🔍 ✎ 🚫
				Pending	Pull Invoices	🔍 ✎ 🚫
				Pending	Pull Invoices	🔍 ✎ 🚫
				Pending	Pull Invoices	🔍 ✎ 🚫
				Completed	Pull Invoices	🔍 ✎ 🚫

## 10. Updating Customer TIN and BRN Details

Zoho Books does not mandate TIN and BRN fields for customers. However, these details are mandatory for LHDN MyInvois submission.

For each customer:

1. Open the customer record in Advintek
2. Enter the following details like:
  - a. Customer TIN
  - b. Customer BRN etc.,
3. Save the customer details

**Invoice Factory** Good Afternoon, [Name] Need help?

### Edit Participants

**Participants Info**

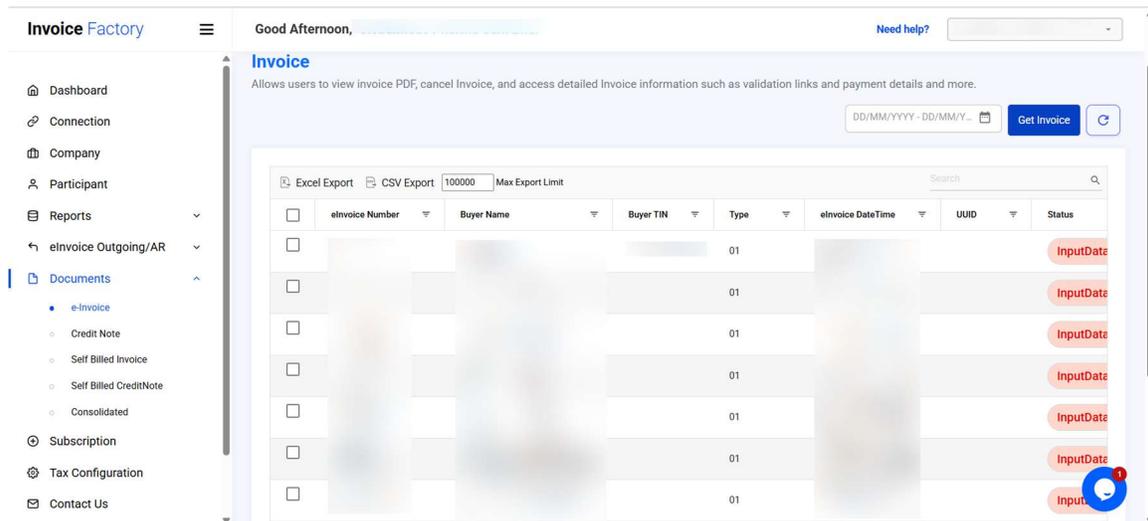
Participants Type *	Registration Name *
Customer	Advintek
Email *	Tax Identifier (TIN) *
[Redacted]	[Redacted]
ID Type *	ID Value *
[Redacted]	[Redacted]
Phone *	Address Line 0 *
[Redacted]	[Redacted]
Address Line 1	Address Line 2
[Redacted]	[Redacted]
Country *	State *
[Redacted]	[Redacted]

Save Cancel

## 11. Fetching and Submitting Invoices to LHDN MyInvois

To submit invoices:

1. Navigate to **Get Invoices** in Advintek
2. Invoices created in Zoho Books are fetched for the selected customers
3. Once customer details are completed:
  - a. Invoices are **automatically submitted** to LHDN MyInvois
  - b. No separate submit button is required



## 12. Viewing Invoice Status

Invoice submission status can be monitored in the **Get Invoices** section.

Details displayed include:

- Invoice number
- Customer details
- Submission status
- LHDN MyInvois response

Possible statuses include:

- Ready to IRB initially
- Submitted to IRB
- IRB validation pending
- IRB response success
- IRB response failed

**Note:** If the input data is incorrect, it will show input data error status.

The screenshot displays the 'Invoice Factory' web application. The top navigation bar includes the logo, a user greeting, and a 'Need help?' dropdown. The left sidebar contains a menu with items like Dashboard, Connection, Company, Participant, Reports, eInvoice Outgoing/AR, Documents (with sub-items like e-Invoice, Credit Note, etc.), Subscription, Tax Configuration, and Contact Us. The main content area is titled 'Invoice' and includes a date range selector and a 'Get Invoice' button. Below this is a table with columns for 'Invoice Number', 'Buyer Name', 'Buyer TIN', 'Type', 'eInvoice DateTime', 'UUID', and 'Status'. The table contains several rows, all of which have a status of 'InputDate'. A search bar and export options (Excel, CSV) are visible above the table. A chat icon with a notification badge is located in the bottom right corner of the table area.