Corporate Compliance and Corporate Admin will be retired on 31 March 2024.

You won't be able to use either software after 31 March 2024. Learn what this means for you.

What is Corporate Admin?

Corporate Admin is the solution to your corporate secretarial needs.

Situated online within MYOB Practice, it combines desktop Corporate Compliance and Company Docs so you can easily manage businesses from the initial incorporation through to de-registration.

What's new in Corporate admin?

2021

22 June

- **New Dividends feature**

  We've released the Dividends feature in Corporate Admin. You can now:
  - track tax and income obligations over time for members
  - produce dividend statements for keeping records of members' tax
  - produce legal documents necessary to disburse company profits.

Learn how.

10 February

- **New and improved document templates**

  Document templates have a new look and feel. There's also more options to format and modify templates.

  If you've customised your document templates—your changes are safe. To use the new document templates, you'll need to change the template style to **New** in the Corporate admin template settings. Learn how.

  > These changes won't affect any past documents you've already generated.

2020

August

We've made some enhancements to the way you work with shareholders in Corporate Admin. We've added more functionality and given the **Shareholders** tab a new look for better record keeping and parcel tracking.

- **Track individual share parcels**

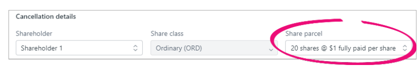
  We now list each individual share parcel separately in a company's **Shareholders** ta b. These parcels can have multiple transactions listed under them.

- **Add certificate numbers and distinctive numbers**

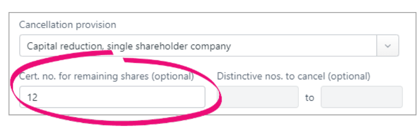
  We've also added the ability to add or edit certificate numbers and distinctive numbers when you make any share change or add historical share transactions.

- **Transfer, cancel or update specific share parcels**

  We've added a new **Share parcel** field to the **Share changes** window so you can now select which parcel to transfer from, cancel or update.

  If you want to transfer, cancel or update only some shares in a parcel, you can also enter a certificate no. for the remaining shares in the new **Cert. no. for remaining shares** field.

- **Add historical transactions to current and previous shareholders**

  We've added a new **Historical shareholders** section to company's **Shareholders** ta b. This section lists previously owned shares in the company. You can also add historical transactions to both current and historical shareholders.

For information on how to make share changes via a 484 form see Issue, transfer and cancel shares. For information on the shareholders register, see Shareholders - AU.

June

When you create a new contact or update an existing contact's details from Corporate Admin, we'll now create a contact, or update the contact's details in AE/AO for you.

- **Contacts you create from Corporate Admin will also be created in AE/AO**

  When you create and link a new MYOB Practice contact in Corporate Admin, we'll automatically create this contact for you in AE/AO.

- **Changes to name and addresses now reflected in AE/AO**

  When you update the name or address for a contact in MYOB Practice via Corporate Admin, we'll also update this contact's name and address in AE/AO.

> Newly created contacts and changes to client details can take up to 5 minutes to appear in AE/AO.

We'll be turning this feature on slowly for practices over the next few weeks, so make sure you're taking regular backups of your data in AE/AO in case anything goes wrong.

- **Issue and transfer jointly**

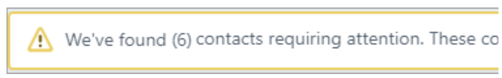
held shares

We've made a few small enhancements to improve the experience of joint shareholders.

April

- **We'll now tell you when a contact is linked to multiple ASIC-registered companies.**

  If you have contact in MYOB Practice that's linked to multiple ASIC-registered companies, we'll send you the following alert on the Client lodgements page.

  Clicking **Review now** will take you to the **Review contacts** page, where you'll see the new **Multi-linked contacts** section. Click the dropdown arrow for each MYOB Practice contact to view the linked ASIC contacts.

- **View ASIC information from your client's contact details.**

  You can now view the registered companies, officers and shareholders linked to your client, from Contacts in MYOB Practice.

- **Unlink ASIC contacts.**

  You can now unlink an ASIC contact from a contact via the **Contacts list** in MYOB Practice. Check out Review contacts - AU for all the details on how to unlink a contact.

How will director IDs affect Corporate admin?

See our page on director identification (ID) numbers.

Which ASIC forms can I prepare in Corporate Admin?

All electronic ASIC forms are available for preparation and electronic lodgement within Corporate Admin.

However, there are a still a small number of forms required by ASIC, to be lodged via Paper. These forms won't be available in Corporate Admin but you can manage these directly on the ASIC portal. Each day Corporate Admin connects to ASIC to bring in any invoices or Annual statements sitting in your mailbox. So we'll also bring in any paper form activity and automatically update Corporate Admin for you.

The table below lists all ASIC company and agent forms available in Corporate Admin.

Company forms	Registered Agent (RA) forms
Form 201 — Application for registration as an Australian company	RA50 – Request withdrawal of form 201

Form 484 — Changes to company details	RA51 – Request reprint of registration certificate
Form 6010 — Application for voluntary deregistration of a company	RA52/57 – Request account transaction listing
Form 205A — Notification of resolution - Change of company name	RA61/62 – Review date report
Form 362 — Notification by a company to nominate or cease a registered agent or contact address	RA63/64 – Request for Individual Company Debt Report / RA 67/68 – Request Company Debt Report
Form 410 — Application for reservation of a name	RA65/66 – Request Documents Lodged Report
Form 361 — Registered agent ceasing to act for a company or companies	RA 71/72 – Request for electronic data download
Form 370 — Notification by officeholder of resignation or retirement	
Form 485 — Statement in relation to company solvency	
Form 492 — Request for correction	

Form 902 — Notification of supplementary information	

Can I track individual share parcels?

Yes! You can track share history, specific parcels of shares, share certificate numbers and distinctive numbers. You can also select which parcel of shares you want to transfer from, cancel or update when you prepare a form 484.

We're working on enhancing our share register even further. Here's a sneak peak of what's coming later in 2020:

- prepare dividend forms
- track dividend history

Can I produce Share certificates?

Of course you can! We have professional-looking PDF share certificates that you can download and issue as required.

We've also added the ability to customise share certificates! Just click **Settings** on the left navigation bar in MYOB Practice, then click **Templates**, located under **Practice Defaults**. Click the name of any template to edit.

When you save the template, your changes are applied practice-wide. This means employees can produce these share certificates, across all clients.

Can I customise document templates?

Yes! You can edit all Corporate Admin document templates.

In MYOB Practice, click **Settings** on the left navigation bar then click **Templates**, located under **Practice Defaults**. Click the name of any template to edit.

The template editor is really easy to use – there's no complicated conditions or formulas to learn. You're also able to upload images like your company logo, to the template.

When you save the template, your changes are applied practice-wide meaning all employees will be able to use the template across all clients.

See Customising document templates - AU for more information.

Can I send documents via the client portal?

Yes! Corporate Admin integrates with the MYOB Practice client portals so you can easily get ASIC forms approved *and* signed. The client portal even lets you send reminders!

Do ASIC accept electronic signatures?

ASIC have previously confirmed they will accept digital signatures on all electronic forms, but have also made comments suggesting that form 362 should be "held in a paper format". This would imply the need for a wet signature on that original document. We recommend that you print and have your client sign and return form 362 before lodging.

Can I control who can see and lodge forms on a company's behalf?

At this stage, all users in the practice will have full access to all features in Corporate Admin. Our vision for the future is to have task and user security that you can tailor to suit your practice's needs.

There are some security measures you can take to prevent users from accessing certain clients. See Securing your data for more information.

Can I track fees, when they're due and if they've been paid?

Of course you can – you can find them in

Debts. We'll show you what each client owes, when payment is due and if they've been paid.

We connect to ASIC every day to bring you any outstanding annual statements, transactions and debt payable.

From **Debts**, you can send payment reminders via the portal to your clients and help them avoid those pesky late payment fees.

Can I add multiple ASIC agents?

Yes! From the **ASIC Agent settings**, click **Onboard agents** to add a new agent and link their contacts.

Some of my clients own multiple entities. How will Corporate Admin help me keep track of these relationships?

We've added a cool visualisation tool that displays an intuitive diagram of all the known relationships between entities, officers and shareholders recorded in MYOB Practice. The diagram is a fun and easy way of explaining and understanding complicated relationships.

You'll find it in the contact's **Overview** tab in **Corporate Admin**.

Can I move my desktop Corporate Compliance data online?

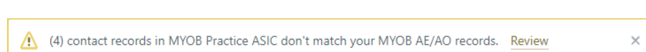
We have an option to migrate your existing MYOB Corporate Compliance (CC) history on the desktop, into MYOB Practice!

You can migrate a history of all ASIC transactions previously recorded in desktop for active clients. Each transaction also includes the applicable ASIC document reference number so you can look it up directly on the ASIC portal. We also import all your client's Corporate Compliance documents into MYOB Practice under their client **Documents** tab.

You can only import one database. However, if you import the wrong backup file — don't worry. You can upload another one and import the data again. This will override the wrong data imported.

Will Corporate Admin notify me of changes to a client's address or name in AE/AO?

Yes! When you or anyone changes a client's address or name in AE/AO, you'll receive an alert (like the one below) in Corporate Admin to let you know that you might need to change these details with ASIC.



Click **Review** to view the data discrepancies.

Does Corporate Admin

integrate with my AE/AO database?

Yes! Your client and contact data in AE/AO will prefill into the relevant workflows in Corporate Admin. When you update the name or address for a contact in MYOB Practice via Corporate Admin, we'll also update this contact's name and address in AE/AO. When you create a new contact in Corporate Admin, we'll also create them in AE/AO for you.

> New contacts and changes to client details can take up to 5 minutes to appear in AE/AO

This sounds great! So...

How do I get Corporate Admin?

If you're interested in getting Corporate Admin for your practice, have a chat to your Client Manager and let them know you're interested.

How can I prepare my practice for Corporate Admin?

All you need for Corporate Admin is:

- an ASIC registered agent number
- access to ASICs' online services (ASIC portal)
- EDGE lodgement credentials.

If you're using AE/AO we recommend performing some additional tasks to prepare your practice.

Troubleshooting

When I add an agent, it says my agent details are incorrect. How do I fix this?

When adding an agent to Corporate Admin, make sure you're entering your EDGE lodgement credentials and not your ASIC portal login.

This error may also appear when your EDGE password is expired.

ASIC changes your EDGE password every 30 days, so sometimes the password in your current Corporate Compliance software isn't valid anymore. In this case, call ASIC on **1300 300 630** to request a password reset.

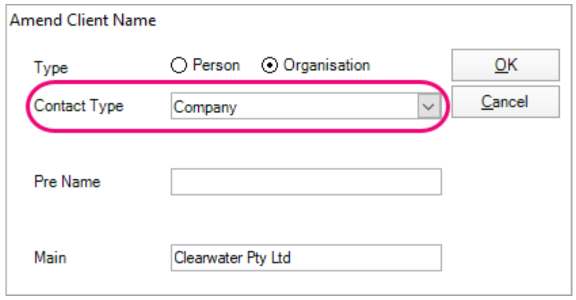
The AE/AO contact that I want to link to doesn't appear in the list of contacts. Why?

When linking unlinked contacts, if you can't find the AE/AO client you're looking for, make sure they're:

- An active contact in AE/AO. Inactive contacts and closed clients won't appear in your MYOB Practice contacts list.
- If you're using AE, make sure the **Contact type** is a **Company**.

  To check the **Contact type**, open the contact or client's record and from the

Main tab, click **Edit client detail**.



If you've recently created a new contact or made a change to a contact's details, it can take up to 5 minutes to appear in MYOB Practice.

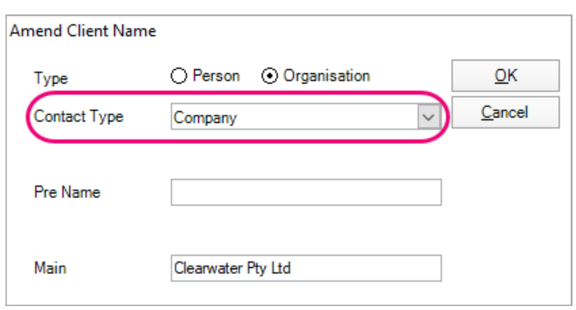
If the contact doesn't exist at all, create them as a new contact or client from within AE/AO.

I can't generate any forms or see any company data. How do I fix this?

There's a couple reasons why you might not be able to generate any forms or see company data.

- First, make sure you're the company's registered ASIC agent.
- If you're using AE, make sure the **Contact type** is a **Company**.

  To check the **Contact type**, open the contact or client's record and from the **Main** tab, click **Edit client detail**.



Where can I get more help?

Check out our MYOB Practice online help or contact our support team.