

Review contacts - AU

When you have ASIC companies, officers or shareholders in MYOB Practice that:

- are not linked to an MYOB contact
- are linked to multiple MYOB contacts
- have different data in Corporate admin to that on ASIC's records,

you'll receive the following message on your Client lodgements page:

 We've found (6) contacts requiring attention. These contacts are unlinked, linked to multiple contacts or have different data to ASIC. [Review now](#)

To view the affected contacts, click **Review now**.

Unlinked contacts

Linking an ASIC contact to MYOB Practice streamlines your data entry so you can keep your records and ASIC's up-to-date. When anyone makes a change to the contact details with ASIC, we'll let you know, so you can update your records accordingly. You only need to link each contact once.

An identifier is the client's date of birth, ABN or ACN. This helps you differentiate between contacts with the same name or identify contacts with an incorrectly entered date of birth, ABN or ACN.

When creating a new contact to link to, the new contact is added to your MYOB Practice contacts list, so you can select them whenever you need to select a contact in MYOB Practice. If you use AE/AO, we'll also create the contact in AE/AO for you. You only need to link each contact once.

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

To link a contact

1. Click **+ Link new or existing contact**. The field becomes editable.
2. Choose the contact you want to link:
 - To link an existing contact

a. Enter the name of the contact in the field. As you type a list of contacts appears.

b. Select the right contact and press **ENTER**.

- To create and link a new contact
 - a. Click **Create contact** to create the contact in MYOB Practice. The **Create contact** window appears.
 - b. Fill in the contact details and click **Save**.

The MYOB Contact name, identifier and (if applicable) client code appear in the relevant fields.

3. Repeat steps 1 and 2 until all contacts are linked.

4. Click **Finish**.

Multi-linked contacts

If you have any companies linked to multiple ASIC-registered companies, you'll receive the message "**We've found (X) contacts requiring attention. These contacts are unlinked, linked to multiple contacts or have different data to ASIC**" on the **Client lodgements** page.

These multi-linked companies will also display the message "**This contact isn't linked to a company, trust or SMSF that your practice manages**" when you attempt to access their Corporate admin page.

You'll need to unlink any incorrectly linked companies from their contact details in MYOB Practice before you can access their Corporate admin page.

To view multi-linked contacts

1. Select **All clients** on your client side-bar and open **Corporate admin**.
2. Select **Client lodgements**. The **Client lodgments** page opens with the following alert at the top of the page.

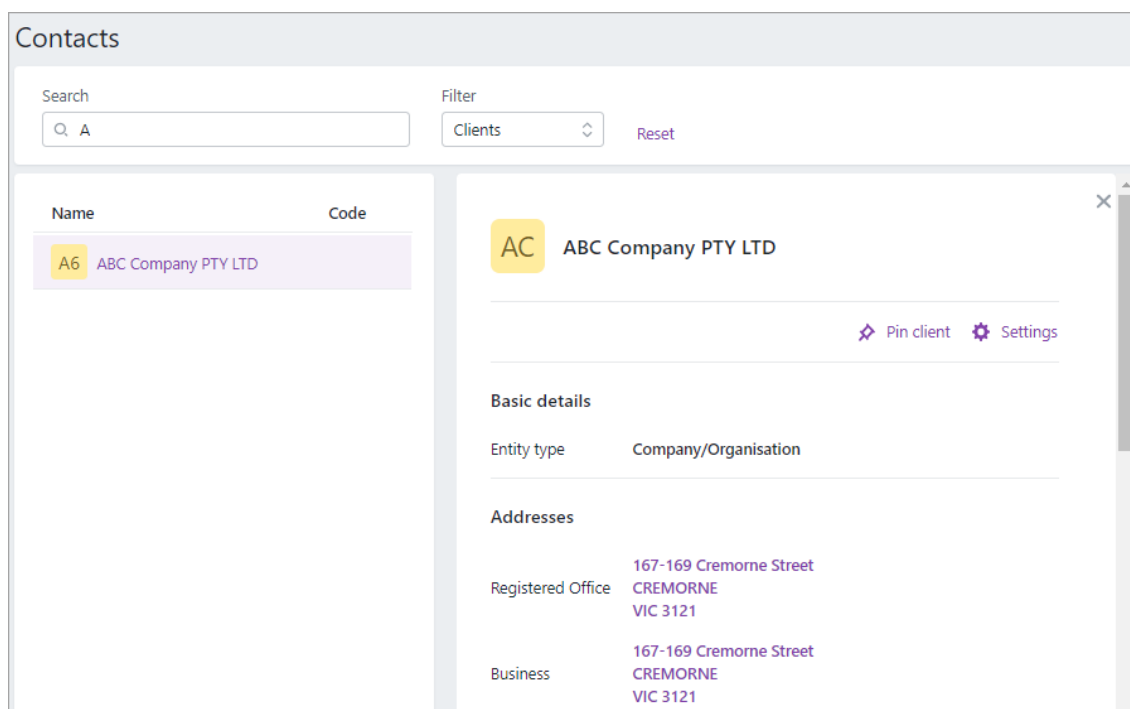


3. In the alert, click the **Review now** link. The **Review contacts** page opens.


All contacts linked to multiple ASIC-registered companies are listed in the **Multi-linked contacts** section. To unlink any additional or incorrectly linked companies, go to the MYOB Practice contact's details and unlink the company from ASIC information. See [To unlink a contact](#) for more information.

To unlink a contact

1. Click **Contacts** on the top menu bar. The **Contact list** appears.
2. Find your client in the **Contact list** and click the row with their name.



A right-hand pane appears with their contact details.

3. In the right-hand pane, scroll until you see **ASIC information**.
4. Click **Edit**.
5. For the incorrectly linked company, click  to unlink them from this contact. The registered company disappears from the contact's ASIC information.

ASIC information

| | |
|---|---|
| AC ABC Company PTY LTD Registered company ACN 600600600 Registered address 167-169 CREMORNE ST CREMORNE VIC 3121 PPOB 167-169 CREMORNE ST CREMORNE VIC 3121 | AC XYZ Company PTY LTD Registered company ACN 600700700 Registered address 167-169 CREMORNE ST CREMORNE VIC 3121 PPOB 167-169 CREMORNE ST CREMORNE VIC 3121 |
|---|---|

[+ Link ASIC contact](#) ⓘ

Cancel Save

6. Click **Save**.

MYOB Practice and ASIC contact comparison

If there's a difference between the information on your client's Corporate admin records to the information on ASIC's records, these discrepancies will appear in the MYOB Practice and ASIC contact comparison section.

When lodging a form to update your client's ASIC's records, you'll also need to update your Corporate admin records once ASIC have accepted the changes. When ASIC has accepted the changes, we'll show you the above alert. Click **Review contacts** to access the **MYOB Practice and ASIC contact comparison**.

To update your MYOB Practice records

1. If you want to update **all** listed contacts, select the checkbox in the column header, next to **Name**. This will select all the contacts on the page.

If you need to update only one contact, select the checkbox next to the name of the contact you want to update.

The **Update MYOB Practice**, **Dismiss for 7 days** and **Delete** buttons appear.

2. Click **Update MYOB Practice**.

If you've selected to update a contact's address, you'll receive a prompt to select the address type to update for each contact. Select the address type, then click **Update**.

The contact's name and address updates in MYOB Practice. If you use AE/AO, these details will also be updated in AE/AO on the desktop. Changes can take up to 5 minutes to appear in AE/AO.

To dismiss or delete the alert

1. If you want to update **all** listed contacts, select the checkbox in the column header, next to **Name**. This will select all the contacts on the page.

If you need to update only one contact, select the checkbox next to the name of the contact you want to update.

The **Update MYOB Practice**, **Dismiss for 7 days** and **Delete** buttons appear.

2. Click **Dismiss for 7 days** or **Delete**.

If you choose to **Dismiss for 7 days**, you won't be notified to update the contact details for 7 days.

If you choose to **Delete**, you won't be notified to update the contact's details again.