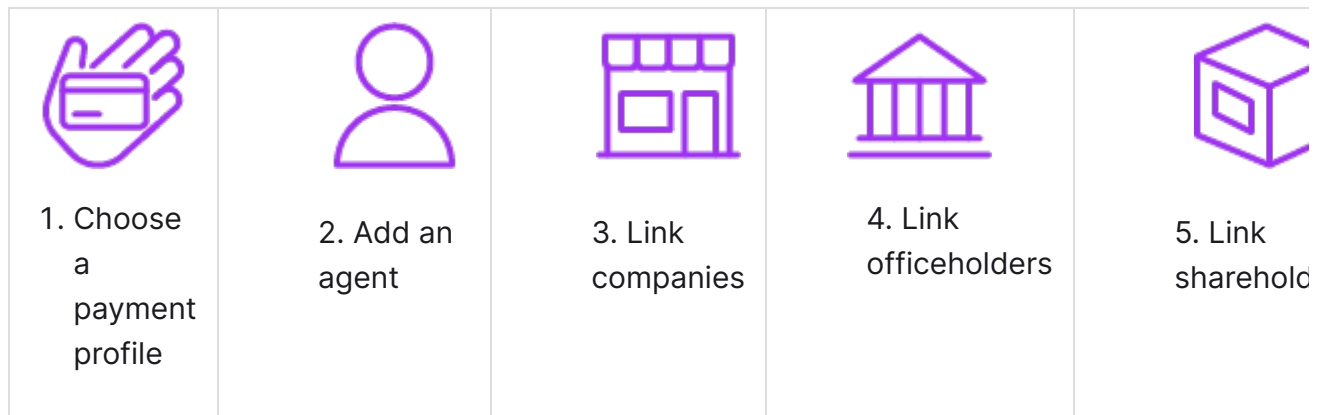# Setting up an ASIC agent - AU

When setting up your agent, you'll need to enter your agent and lodgement details. We'll then automatically lodge forms RA61 and RA71 to download any company data associated with your agent.

1. Choose a payment profile	2. Add an agent	3. Link companies	4. Link officeholders	5. Link sharehold

This can take anywhere from a couple of minutes to a couple of hours, depending on the number of companies you're the registered agent for.

> See how it's done with a free online course in MYOB Academy.
>
> We'll take you through the steps involved in setting up Corporate Admin, what you should do to prepare your practice for Corporate Admin and where to go if you prefer MYOB to help you with the setup.

Before you begin

Make sure you've:

- registered for ASIC online services and can log into the **ASIC agent portal**.
- registered for EDGE lodgement access and have an **EDGE ID** and **EDGE Password**. This is different to the username and password you use to log into the ASIC agent portal.
- Have synced your MYOB AE/AO contacts.

If you've been using a Corporate Compliance software, make sure you download and complete any outstanding annual statements, and lodge any forms waiting to be lodged. This prevents any loss of documents and forms.

Once your agent is set up in MYOB Practice, it's important that you only connect to ASIC via MYOB Practice. This ensures you receive all company annual statements and reports in MYOB Practice.

> **IMPORTANT!** Do not use MYOB Corporate Compliance or any corporate compliance software, during, or after this process. Connecting to ASIC from another software will affect the download of your ASIC data.

1. Choose a payment profile

The first task in setting up Corporate admin is to set up your payment profile. This is the payment profile that will be charged ASIC's fee when registering a new company, trust or self-managed super fund.

1. Log into **MYOB Practice** and click **Settings** on the left navigation bar.
2. Under **Practice information**, click **Corporate admin**.
3. Click **Begin setup**. A warning message appears.
4. Click **Continue**. **Step 1/5: Set up payment** page appears.
5. Click the **Select a payment profile** drop down menu, and choose a payment method.
6. Select **I have read and accept the terms and conditions**.
7. Click **Save & continue**. **Step 2/5: Agent details** page appears.

2. Add an agent

To lodge and prepare forms on behalf of your clients you'll need to add an ASIC agent.

We'll then automatically lodge forms RA61 and RA71 to download any company data

associated with your agent. This can take anywhere from a few minutes to a few hours, depending on the number of companies you're the registered agent for.

You must not use any corporate compliance software during this process.

1. From the **Agent details** screen, click **Add ASIC agent**. The **Add ASIC agent** window appears.
2. Select the **Type of agent** you want to add. The options are **Individual** or **Company**.
3. If you've selected...

Individual	Enter the agent's first name and last name.
Company	Enter the **Company name**, **ACN** and the **Nominee's** (primary contact) first name and last name.

4. Enter your unique **EDGE lodgement details** in the **ASIC Agent's details** section.
5. Click **Add agent**. The agent appears in the ASIC agents list.
6. Click **Save & continue**. Your ASIC company data begins to download.

> You can close this window or continue to work in other areas of MYOB Practice. Your corporate compliance data will continue to download in the background.

7. Once the download completes, click **Next step** to link companies to contact.

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3. Link your companies

You'll now need to link each company's data to its corresponding MYOB client record. We'll automatically link companies where the company name or ACN in ASIC matches the name or ACN of a client in MYOB Practice.

For any companies not linked automatically, you can manually search for an existing client or, create a new client.

1. In the **Linked MYOB contact** column, click **Link new or existing contact**.
   - To select a contact:
     a. Enter the contact's name. As you type, the drop-down list will populate with contacts matching this name.
     b. Click the contact name to link the ASIC company to a contact in MYOB Practice.

   - To create a new contact:
     a. Click **Create new contact**.

> Any newly created contacts will appear in 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 new contact in AE/AO for you.

2. Once all companies are linked to an MYOB contact, click **Next**.

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4. Link company officers

Now that you've linked each company to an MYOB client, link each officer to an MYOB contact. We'll automatically link officers where the contact's name or date of birth in ASIC matches the name or date of birth for a client in MYOB Practice.

You may not have an existing MYOB contact record for each officer, but you can create them as a contact in MYOB Practice from this window.

> You can skip this step and link your contacts later. Click **Next step**.

1. In the **Linked MYOB contact column**, click **Link new or existing contact**.
   - To select a contact:
     a. Enter contact's name. As you type, the drop-down list will populate with contacts matching this name.
     b. Click the contact name to link the ASIC officer to a contact in MYOB Practice.

   - To create a new contact:
     a. Click **Create new contact**.

     > Any newly created contacts will appear in 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 new contact in AE/AO for you.

2. Once all officers are linked to an MYOB contact, click **Next step**.

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5. Link company shareholders

You're almost done! Lastly, link each ASIC shareholder to their associated MYOB contact record.

You may not have an existing MYOB contact record for each shareholder, but you can create them as a contact in MYOB Practice from this window.

> You can skip this step and link your contacts later. Click **Next step**.

1. In the **Linked MYOB contact** column, click **Link new or existing contact**. The field becomes editable.
   - To select a contact
     a. Enter contact's name. As you type, the drop-down list will populate with contacts matching this name.
     b. Click the contact name to link the ASIC company to the relative contact record in MYOB Practice.
   - To create a new contact:
     a. Click **Create new contact**.

     > Any newly created contacts will appear in 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 new contact in AE/AO for you.

2. When all shareholders are linked, click **Finish**.

Your next steps

Now that you've set up an agent, you can start lodging forms on your client's behalf.

> If you have multiple employees, you might also want to [disable access to MYOB Corporate Compliance](#) (if applicable) to prevent them from lodging in the desktop software.

To manage a company, trust or fund's details, you'll need to [add them to your list](#) in MYOB Practice.

If you're a former MYOB Corporate Compliance user, you can also import your database into Corporate admin.

To add an additional agent

1. Go to **Settings** and select **Corporate admin** on the sidebar.
2. Click **Onboard agents**.

3. Repeat steps 2 to 5 to link the companies associated with the new agent.