



Accountants  
**Enterprise**

Integration with AE Guide

# Corporate Compliance

Version 3.1 Beta





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# Integrating Corporate Compliance with MYOB AE

## Introduction

Corporate Compliance 3.1 provides for direct integration of Corporate Compliance with MYOB Accountants Enterprise (MYOB AE).

For Corporate Compliance sites that have previously been running Corporate Compliance as a non-integrated product, or running with integration to Profiles, you can now change your Corporate Compliance mode to be integrated with your MYOB AE data.

The steps below describe how to change your Corporate Compliance 3.1 install to be integrated with MYOB AE.

1. Install Corporate Compliance 3.1.
2. Install Practice Manager 5.4.3.
3. Change the Corporate Compliance installation mode.
4. Open MYOB AE, to perform the updates to the MYOB AE and Corporate Compliance databases.
5. Configure the Corporate Compliance integration settings.
6. How to open Corporate Compliance from MYOB AE.
7. Clear the previous integration mode links (in Corporate Compliance).
8. Check matched contact list and update contact data in MYOB AE.
9. Auto link contacts.
10. Manually link contacts.
11. Add contacts to MYOB AE.
12. Add contacts to Corporate Compliance.
13. Change tasks - check and clear.

## How to integrate Corporate Compliance with MYOB AE

### Step 1 — Install Corporate Compliance 3.1

If you have not already done so, install Corporate Compliance 3.1 in upgrade mode over your existing Corporate Compliance install.

You must first upgrade to Corporate Compliance 3.1 with your existing integration mode. This allows you to check that Corporate Compliance 3.1 is running, and that database backups have been taken.

### Step 2 — Install Practice Manager 5.4.3

If you have not already done so, install MYOB Accountants Enterprise 5.4.3.

To check your version of MYOB AE, select the menu Help > **About**. The version needs to show as **5.4.3.228** or greater.

Ensure that MYOB AE is running, and that database backups have been taken.

### Step 3 — Change the Corporate Compliance integration mode

When you are ready to change your Corporate Compliance install to the integration with MYOB AE mode, then follow these steps:

1. Make a note of the current location of your Corporate Compliance database. This can be found either from:
  - a. Open **Corporate Compliance**.
  - b. Select the menu Help > **About Corporate Compliance**.
  - c. Click **Application Details**.

Or from:

- a. Open the **Corporate Compliance Utilities** window.
- b. Select Settings > **Database references**.

**Corporate Compliance server:** \_\_\_\_\_

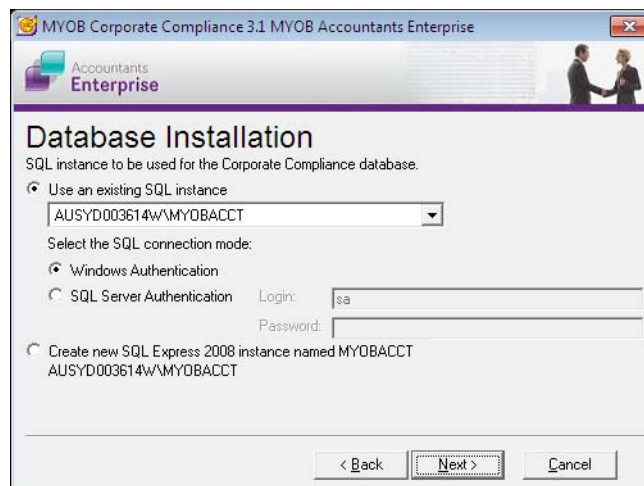
**Corporate Compliance database:** \_\_\_\_\_

2. Uninstall Corporate Compliance 3.1. This will remove the integration details (registry keys) for Corporate Compliance.  
**Do not** uninstall or remove the Corporate Compliance SQL database.
3. Install Corporate Compliance 3.1. This will now run in new install mode. Refer to the Installation Guide for full details.

4. At the Select Integration Mode step, select the option **Integrated with MYOB Accountants Enterprise**.



5. At the Database Installation step:



- a. Select the option **Use an existing SQL 2005 or SQL 2008 instance**.
- b. From the drop down list of available SQL instances and databases, select your existing Corporate Compliance database, as identified in **Step 1.** above.

### Step 4 — Open MYOB AE, to perform the updates to the databases

On completion of the Corporate Compliance 3.1 install, then on first opening of MYOB AE, you will be prompted for a database upgrade.

The MYOB AE database will be updated, and then the Corporate Compliance database will be updated.

MYOB AE will now have additional screens for Corporate Compliance.

- Corporate Compliance tab on the client and contact pages.
- 3 homepages are available in MYOB AE for Corporate Compliance.
  - ASIC forms in progress
  - Company Statements
  - Name and address changes from MYOB AE.
- Menu for Maintenance > Corporate Compliance > **Settings**.
- Menu for Maintenance > Corporate Compliance > **Corporate Compliance**.

### Step 5 — Configure the Corporate Compliance integration settings

You will now need to configure the Corporate Compliance database connection details and data type mapping details. This is done from Maintenance > Corporate Compliance > **Settings**.

#### How to set the database connection settings

1. Select the menu Maintenance > Corporate Compliance > **Settings**.
2. Click on the **Database Connection** tab.
3. Select the SQL Server name and instance where the Corporate Compliance database is located.
4. Select the Corporate Compliance database from the drop-down list of databases available for the above selected SQL instance.
5. Click **Update connection details**.

#### How to set the address type mappings

Corporate Compliance uses the 4 address types of:

- Business address
- Home address
- Postal address
- Registered address.

MYOB AE allows you to set any description for your address types. Corporate Compliance needs to know which of these address types in MYOB AE are used for the 4 address types maintained within Corporate Compliance.

1. Select the MYOB AE menu Maintenance > Corporate Compliance > **Settings**.
2. Click on the **Data Mapping** tab.

3. In the **Address Type Mapping** section:

For each **Corporate Compliance address type** (first column) select the corresponding address type from the drop-down list in MYOB AE **address type** (second column).

### How to set the contact relationship type mappings

Corporate Compliance integrates officeholder relationships with MYOB AE. The 3 available Corporate Compliance officeholder relationship types are:

- Company Director
- Company Secretary
- Trustee.

MYOB AE allows you to set any description for your Association Types. Corporate Compliance needs to know which of these association types (contact relationship types) in MYOB AE are used for the 3 officeholder roles maintained within Corporate Compliance.

1. Select the MYOB AE menu Maintenance > Corporate Compliance > **Settings**.
2. Click on the **Data Mapping** tab.
3. In the **Relationship Type Mapping** section:  
For each **Corporate Compliance relationship type** (first column) select the corresponding address type from the drop-down list in MYOB AE **association type** (second column).

## Step 6 — How to open Corporate Compliance from MYOB AE

There are three ways you can open Corporate Compliance:

1. From the MYOB AE main menu.  
Select Maintenance > Corporate Compliance > **Corporate Compliance** from the MYOB AE main menu.
2. From an MYOB AE client or contact page.
  - a. Open a client or contact in MYOB AE.
  - b. Go to the **Corporate Compliance** tab.
  - c. Click **Open Person** (if the contact or client is a person)  
Or  
Click **Open Corporation** (if the contact or client is an organisation).



Corporate Compliance will open, displaying this client/contact's page at the **Details** tab. (If a person, you will see his/her **People** page; if a company, you will see the company's **Corporations** page.)

3. From a Corporate Compliance Homepage in MYOB AE.

Open a Corporate Compliance Homepage in MYOB AE. This may be any one of the 3 available homepages, which are:

- ASIC forms in progress
- Company Statements
- Name and address changes from MYOB AE.

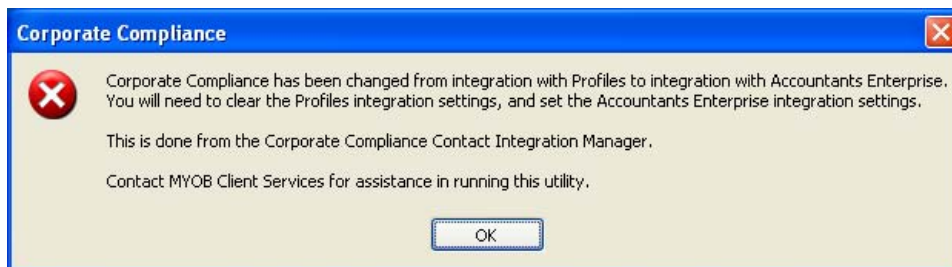
Click on the hyperlinked corporation or person name on the homepage list.

Corporate Compliance will open at the **Details** tab for the selected corporation or person.

### Step 7 — Clear previous integration mode links (in Corporate Compliance)

At this point, Corporate Compliance is integrated with the MYOB AE database, but each contact in Corporate Compliance is not yet linked to its corresponding contact record from MYOB AE.

If you were previously running Corporate Compliance integrated with Profiles, you will get this message on opening Corporate Compliance:



This is to prevent incorrect update of contact details in Corporate Compliance from a contact management system you are no longer integrated to.

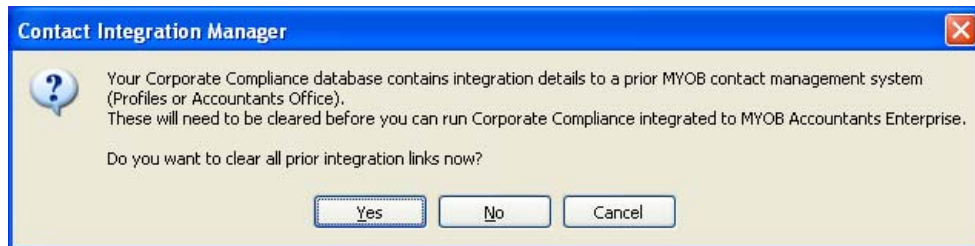
You must clear this integration mode, which is done using the **Contact Integration Manager**.

#### ***To clear previous integration mode links in Corporate Compliance***

1. Using Windows Explorer, find and run the file **ContactIntegrationManager.bat**, which is located in the Utilities folder of your Corporate Compliance program install, for example:

C:\Program Files\MYOB\Corporate  
Compliance\Utilities>ContactIntegrationManager.bat

2. On opening of this utility, you will get the message:



3. Click **Yes**.
4. If this message is not given, you can also run this from the **Clear integration links** task in this utility.
  - a. Click on the **Clear integrations links** task in the navigation panel.
  - b. Click **Clear contact integration links**.

### Step 8 — Check matched contact list and update contact data in MYOB AE

At this point, Corporate Compliance is integrated with the MYOB AE database, but each contact in Corporate Compliance is not yet linked to its corresponding contact record in MYOB AE.

Prior to setting the links between the contact record in Corporate Compliance and the contact record in MYOB AE, you may need to spend some time checking the data currently entered in these 2 databases.

If you were previously running Corporate Compliance integrated with Profiles, then your Corporate Compliance data and MYOB AE data will be almost perfectly matched. You should not require any additional data fixing in MYOB AE.

If you were previously running Corporate Compliance in non-integrated mode, then your Corporate Compliance data and your MYOB AE data may contain some different details for your clients, as the details were entered into each of these 2 databases separately. The differences may be minimal or cosmetic, such as formatting differences for addresses or names, or they may be more substantial, with different types of data being entered into the 2 different databases. For example, you may not have been recording the registered address of each client in your MYOB AE database.

With the integration of Corporate Compliance to MYOB AE, the core contact data is maintained only in MYOB AE. This ensures that shared data is entered only once, and entered in the central location, which then makes it accessible to all the MYOB integrated applications, including Corporate Compliance, Tax and Statutory Reporter.

For a contact that is an organisation, the data taken from MYOB AE is:

- Client code
- Name

- Business address
- Registered address
- Postal address
- ABN
- ACN.

For a contact that is a person, the data taken from MYOB AE is:

- Client code
- Name
- Home address
- Postal address
- Date of birth.

You need to ensure that these details are present and up to date in your MYOB AE database. If not, then your correct Corporate Compliance details will be overwritten with this out of date information on opening Corporate Compliance after linking the contact records.

### ***To check which contacts will be matched***

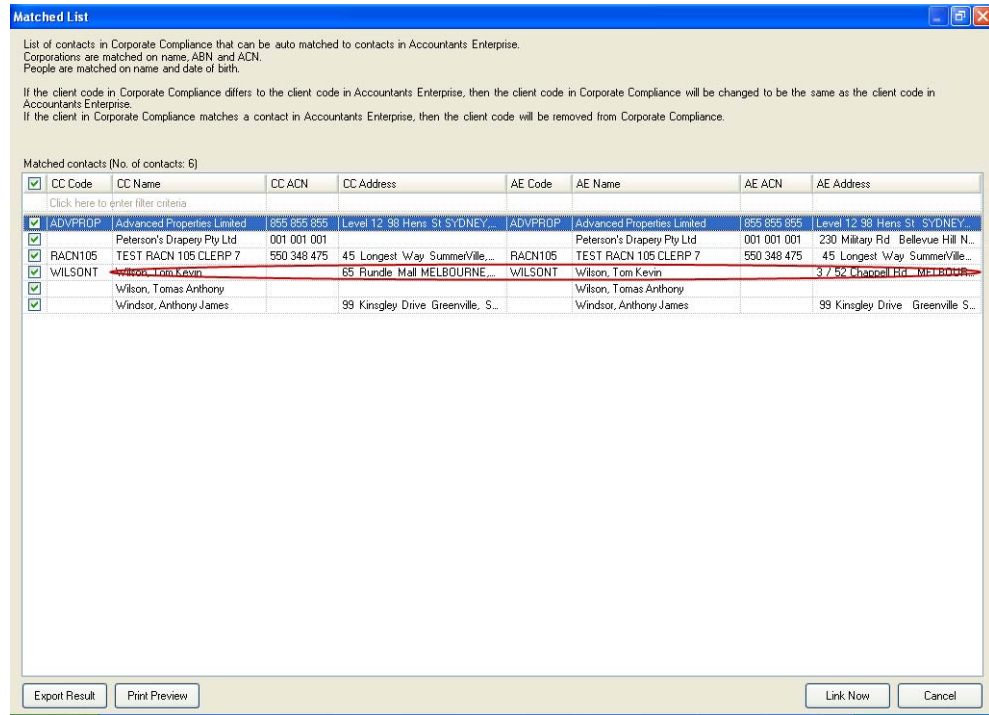
Open the Contact Integration Manager:

1. Using Windows Explorer, find and run the file **ContactIntegrationManager.bat**, which is located in the Utilities folder of your Corporate Compliance program install, for example:

```
C:\Program Files\MYOB\Corporate  
Compliance\Utilities>ContactIntegrationManager.bat
```

2. Select the task **Auto match contacts**.
3. Click **Start Auto Matching**.

The **Matched List** displays:



If you select to link these contact records, then on the next opening of Corporate Compliance, the details in Corporate Compliance will be overwritten with the details from MYOB AE.

If you were previously running Corporate Compliance integrated with Profiles, then your Corporate Compliance data and MYOB AE data will be almost perfectly matched. The records on the Corporate Compliance side, and the match record on MYOB AE side will most likely have the same client code, name and address details.

If you were previously running Corporate Compliance in non-integrated mode, then your Corporate Compliance data and your MYOB AE data may contain more differences. There may be different codes, different name formatting or spelling, and different address formatting or spelling.

- To ensure that the correct details will be kept and maintained, you can export this list to Excel. To do this, click **Export Result** at the bottom of the list.

1	Matched contact list between Corporate Compliance and Accountants Enterprise							
2								
3	CC Code	CC Name	CC ACN	CC Address	AE Code	AE Name	AE ACN	AE Address
4	ADVPROP	Advanced Properties Limited	855 855 855	Level 12 98 Hens St SYDNEY, NSW 2000	ADVPROP	Advanced Properties Limited	855 855 855	Level 12 98 Hens St NSW 2000
5		Peterson's Drapery Pty Ltd	001 001 001			Peterson's Drapery Pty Ltd	001 001 001	230 Military Rd Belk 2070
6	RACN105	TEST RACN 105 CLERP 7	550 348 475	45 Longest Way SummerVille, SA	RACN105	TEST RACN 105 CLERP 7	550 348 475	45 Longest Way Su 4155
7	WILSONT	Wilson, Tom Kevin		65 Rundle Mall MELBOURNE, VIC	WILSONT	Wilson, Tom Kevin		3752 Chappell Rd VIC 3000
8		Wilson, Tomas Anthony				Wilson, Tomas Anthony		
9		Windsor, Anthony James		99 Kingsley Drive Greenville, SA 4567		Windsor, Anthony James		99 Kingsley Drive Gi 4567
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**Check and update the contact details in MYOB AE**

For any contacts in the above auto matched list where there are data differences, you will need to check which data is correct. If the MYOB AE contact details are not the correct, up to date details, then these need to be corrected prior to linking the contact to a Corporate Compliance client.

If you have 2 monitors, it may be easier to have MYOB AE open on one screen, and Corporate Compliance open on the other.

Open the client in MYOB AE and update all out of date or missing details with the correct details from Corporate Compliance. In particular, for all your managed Corporate Compliance companies, ensure that there is a registered address and business address entered for these clients in MYOB AE.

**Step 9 — Auto link contacts**

Once you have completed the contact data updates in MYOB AE, you can now link the contact records in the 2 databases. First run the Auto link contacts feature of the Contact Integration Manager.

### ***To auto link contacts***

1. Using Windows Explorer, find and run the file **ContactIntegrationManager.bat**, which is located in the Utilities folder of your Corporate Compliance program install, for example:  
C:\Program Files\MYOB\Corporate Compliance\Utilities>ContactIntegrationManager.bat
2. Select the task **Auto match contacts**.
3. Click **Start Auto Matching**.  
The **Matched List** is displayed.  
All the records are selected (ticked) by default.
4. Unselect (untick) any records that you do not want to link at this point.
5. Click **Link Now**.  
The system sets the contact record integration link for all the selected contacts.  
On opening of Corporate Compliance, the system will now always update core contact details of this client with the details from MYOB AE.

## Step 10 — Manually link contacts

For records that the system has not been able to auto match, then you can manually match the two. This is done using the **Manually match contacts** feature of the **Contact Integration Manager**.

The auto match may not have been successful due to missing details on either side, e.g., missing ABN or Date of birth, or due to different spelling of names.

### ***To manually match your contacts***

1. Using Windows Explorer, find and run the file **ContactIntegrationManager.bat**, which is located in the Utilities folder of your Corporate Compliance program install, for example:  
C:\Program Files\MYOB\Corporate Compliance\Utilities>ContactIntegrationManager.bat
2. Select the task **Manually match contacts**.  
The first table lists the contacts in Corporate Compliance that are not linked to any contact record in MYOB AE.  
The second table lists the contacts in MYOB AE that are not linked to any contact record in Corporate Compliance.  
For each Corporate Compliance contact, you need to find the MYOB AE contact that this should be linked to.

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**Note:** For any client in Corporate Compliance that does not already have a corresponding contact record entered in MYOB AE, then you will use the next step, **Add contacts to MYOB AE**, to set the contact link for that client. At the completion of this **Manually match contacts** process, then the only contact left on the Corporate Compliance side should be those with no corresponding record already entered in MYOB AE.

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3. Select (highlight) a contact record on the Corporate Compliance list.
4. Select (highlight) the record on the MYOB AE list that this is to be linked to.
5. Click the Down Arrow button (under these lists) to add this client to the match list.
6. If you have incorrectly selected any record, select (highlight) that record in the Matched List, and click the Up Arrow button to remove it from the matched list.
7. Click **Link Now** to set the contact record integration link for all clients in the Matched list.

### Step 11 — Add contacts to MYOB AE

All contacts in Corporate Compliance must be linked to a contact record in MYOB AE.

For any contact in Corporate Compliance that does not already have a corresponding contact record entered in MYOB AE, then you will need to add this contact to MYOB AE. This is done using the **Add contacts to AE** feature in the **Contact Integration Manager**.

#### ***To add contacts to MYOB AE***

1. Using Windows Explorer, find and run the file **ContactIntegrationManager.bat**, which is located in the Utilities folder of your Corporate Compliance program install, for example:  
C:\Program Files\MYOB\Corporate Compliance\Utilities>ContactIntegrationManager.bat
2. Select the task **Add contact to AE**.  
The table lists the contacts in Corporate Compliance that are not linked to any contact record in MYOB AE.
3. Select (highlight) the required Corporate Compliance contact.
4. Click **Add contact to AE**.

5. System adds a new contact record to MYOB AE. This new contact is linked to the Corporate Compliance contact.

The details of the new contact in MYOB AE are taken from the Corporate Compliance contact.

For a contact that is an organisation, the details taken from Corporate Compliance are:

- Name
- Business address
- Registered address
- Postal address
- ABN
- ACN.

For a contact that is a person, the details taken from Corporate Compliance are:

- Name
- Home address
- Postal address
- Date of birth.

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**Note:** This has been added as a contact, and not as a client. The client code from Corporate Compliance is not brought across. If you want this to be a client in MYOB AE, then open this contact in MYOB AE and select the task Convert to client.

---

### Step 12 — Add contacts to Corporate Compliance

As you add new clients to your MYOB AE database, if these are required for Corporate Compliance work, then they need to be also added to the Corporate Compliance database.

You can add a contact to Corporate Compliance by using either the **Import contacts from AE** menu, or by selecting them from the **Corporations** list or **People** list.

#### ***How to import contacts from MYOB AE***

1. Open **Corporate Compliance**.
2. Select the menu Tools > **Import contacts from AE**.

The **Import contacts from AE** window opens. This lists all the contacts in the MYOB AE database that are not already in the Corporate Compliance database.



3. Select the contacts to be brought across to the Corporate Compliance database by ticking the checkbox next to each required contact.
4. Click **OK**.  
A confirmation message is displayed "This process may take some time. Do you want to continue?".
5. Click **Yes** to continue with the import.  
When the import is completed, the number of successfully imported contacts displays.

### ***How to add in one corporation using the Corporations list***

1. Open **Corporate Compliance**.
2. Select **Corporations**.
3. From the Corporations list, select the option **Include all corporations from AE** (which is at the bottom of the Corporations list).
4. The list changes to show all organisations in the MYOB AE database.
5. Select the required MYOB AE contact.
6. Open this contact (using either **Enter** or double-click).
7. System adds this contact to Corporate Compliance, and links it to the MYOB AE contact.

### ***How to add in one person using the People list***

1. Open **Corporate Compliance**.
2. Select **People**.
3. From the People list, select the option **Include all people from AE** (which is at the bottom of the People list).
4. The list changes to show all individuals in the MYOB AE database.
5. Select the required MYOB AE contact.
6. Open this contact (using either **Enter** or double-click).
7. System adds this contact to Corporate Compliance, and links it to the MYOB AE contact.

### Step 13 — Changing tasks in Corporate Compliance from MYOB AE

When the name or address for any person or corporation is changed in MYOB AE, Corporate Compliance checks if notification to ASIC is required. The changes in MYOB AE that may require an ASIC form to be lodged include:

- change of name or home address of an officeholder
- change of business address or registered address of a corporation.

If the change from MYOB AE may require notification to ASIC, then Corporate Compliance generates a task to inform you of the change.

You can access these tasks by clicking **Changes from AE** in the task panel, or by clicking on the message **There are changes to AE. Click here to view.** in the Messages module.

Corporate Compliance checks for these changes when:

- you next open Corporate Compliance  
OR
- if Corporate Compliance is already open, when you next open that person or corporation in Corporate Compliance  
OR
- if Corporate Compliance is already open when you select the menu Tools > **Update from AE.**

During the process of updating your data in MYOB AE, many change tasks may be generated in Corporate Compliance. Most of these are likely to be data corrections and can be deleted.

#### How to remove the task from the change list

If the name or address change entered in MYOB AE is a database correction only, and no change notification to ASIC is required, then select the person or corporation in the **Changes from AE** list, and then select the menu **Delete** task.

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**Tip:** If there are a lot of tasks to be deleted, you can multi-select records in this list, using the **[Shift]** key, or can select all the records using **[Ctrl] + [A]**.

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#### How to notify ASIC of the change

If the name or address change entered in MYOB AE is an actual change of details for that person or company, then you need to generate an ASIC form to notify the change of name or address.

Select the person or corporation in the **Changes from AE** list, and then select the menu **Generate form.**

If the change relates to a person, the **Notify change of name or address wizard** opens.

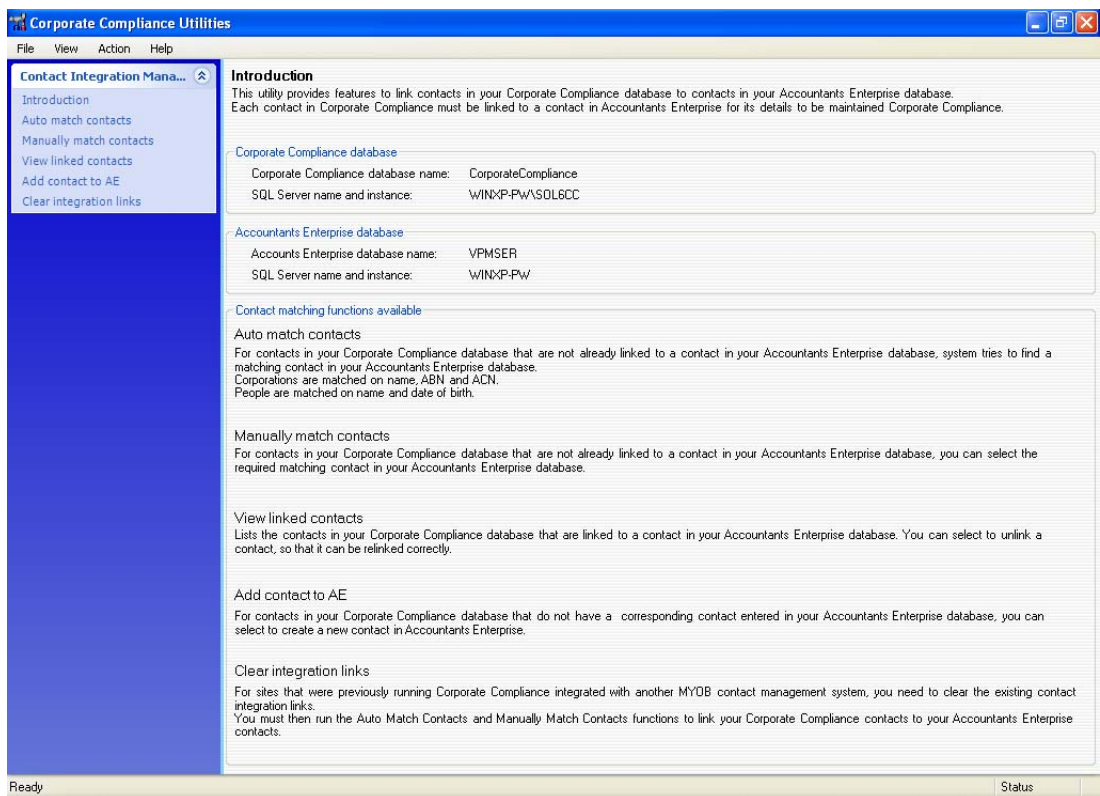
If the change relates to a corporation, the **Notify change of address wizard** opens.

## Contact Integration Manager

The Contact Integration Manager is used to maintain the integration links between your Corporate Compliance contacts, and the corresponding MYOB AE contact.

To open, using Windows Explorer, find and run the file **ContactIntegrationManager.bat**, which is located in the **Utilities** folder of your Corporate Compliance program install, for example:

C:\Program Files\MYOB\Corporate Compliance\Utilities>ContactIntegrationManager.bat



Option	Description
Auto match contacts	For contacts in your Corporate Compliance database that are not already linked to a contact in your MYOB AE database, the system tries to find a matching contact in your MYOB AE database.  Corporations are matched on name, ABN and ACN. People are matched on name and date of birth.

Option	Description
Manually match contacts	For contacts in your Corporate Compliance database that are not already linked to a contact in your MYOB AE database, you can manually select the required matching contact in your MYOB AE database.
View linked contacts	Lists the contacts in your Corporate Compliance database that are linked to a contact in your MYOB AE database. You can select to unlink a contact, so that it can be relinked correctly.
Add contact to MYOB AE	For contacts in your Corporate Compliance database that do not have a corresponding contact entered in your MYOB AE database, you can select to create a new contact in MYOB AE.
Clear integration links	For sites that were previously running Corporate Compliance integrated with another MYOB contact management system, e.g., Profiles, you need to clear the existing contact integration links.  You must then run the <b>Auto Match Contacts</b> and <b>Manually Match Contacts</b> functions to link your Corporate Compliance contacts to your MYOB AE contacts.