ATO Agent Linking

Settings · https://seamlss.com.au/help/ato-agent-linking/

Since 13 November 2023, client-to-agent linking with the ATO has been compulsory for businesses. Seamlss shows your clients how to link to you when they finish onboarding or re-engagement, tells you when they're done, and lets you send a reminder.

In Seamlss: Settings, the **General** tab, then **Agent Linking Instructions**.

Open Settings

Who it applies to. Australian firms only, and only clients that are companies, trusts, partnerships and other entities that aren't individuals or sole traders.

Turn it on

1

Switch on the instructions

In **Settings**, **General**, turn on **Show agent linking instructions**.

2

Add your agent details

Choose **Tax Agent** or **BAS Agent**, then enter your agent number and name. Seamlss puts them into the instructions clients see.

3

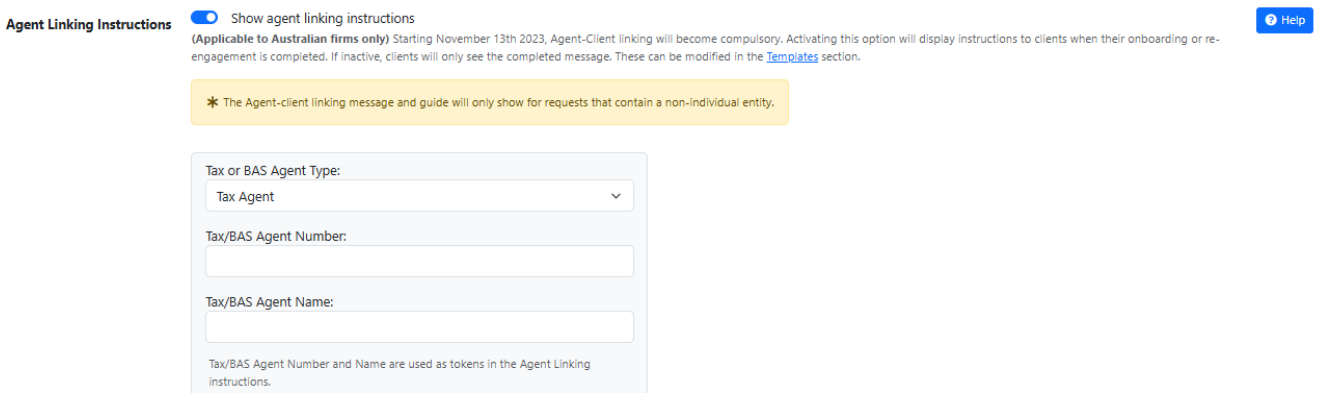
Save

Click **Save Setting**.

4

Get told when a client is done

In **Settings**, **Notifications**, turn on **Completed Agent Linking**, choose who receives it and click **Save Notification Settings**. **Notification settings** explains the recipients.



The agent linking settings on the General tab.

What your client sees

When a client finishes an onboarding or re-engagement request that includes an entity that needs linking, they see the linking steps and a link to a full guide. At the end they tick the entities they've linked and click **Update linked entities**, and Seamlss tells you.

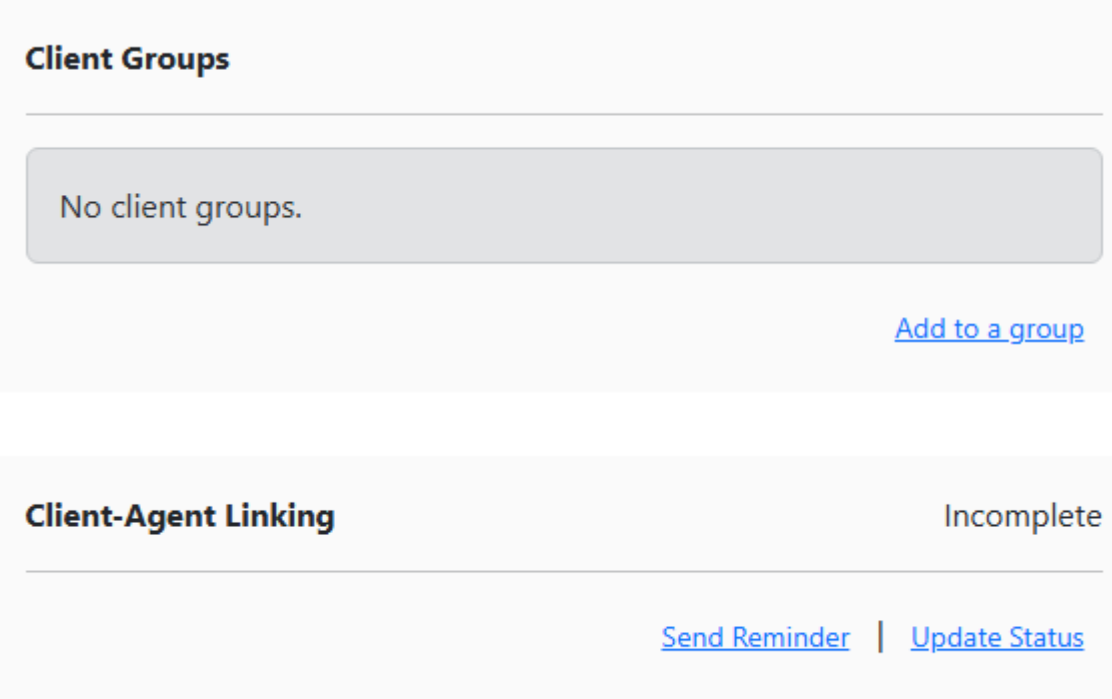
You can change the wording in **Templates**, **Display**: **Onboarding Complete** and **Re-engage Complete**. Send clients who get stuck to **ATO agent linking for clients**.

On the phone with a client? Open the same guide your client sees and talk them through it. Click **Switch** at the top of your dashboard to view Seamlss as a client, click your name at the top right, then **Client-Agent Linking**.

Check who has linked

Open the client record for the company, trust or partnership. The **Client-Agent Linking** panel shows where the client is up to.

Panel shows	What it means
Complete	The client ticked the entity off as linked, or you marked it done. Clients brought in from XPM start as Complete, because Seamlss takes it that clients already in your practice manager are linked to you.
Incomplete	The client finished their onboarding or re-engagement request but hasn't told Seamlss they've linked.
-	The client hasn't finished their request yet.



A company whose client hasn't finished agent linking: Send Reminder sits next to Update Status.

How reminders work

Seamlss doesn't send agent linking reminders on a schedule. Clients get two nudges:

Nudge	When
A banner in the client's Seamlss account	Every time they log in, until each entity is ticked off: **Complete your Client Agent Linking**, with a link to the steps. Each entity still to link shows **Agent Linking incomplete**. The banner stays out of the way while the client has a request open.
A reminder email from you	Only when you click **Send Reminder**.

1

Open the entity

Open the company, trust or partnership showing **Incomplete** and click **Send Reminder** in the **Client-Agent Linking** panel.

2

Send it

The entity is already ticked. Click **Send Reminder**. The email goes to the entity's primary contact. No primary contact? The window says so: add one to the record and try again.

3

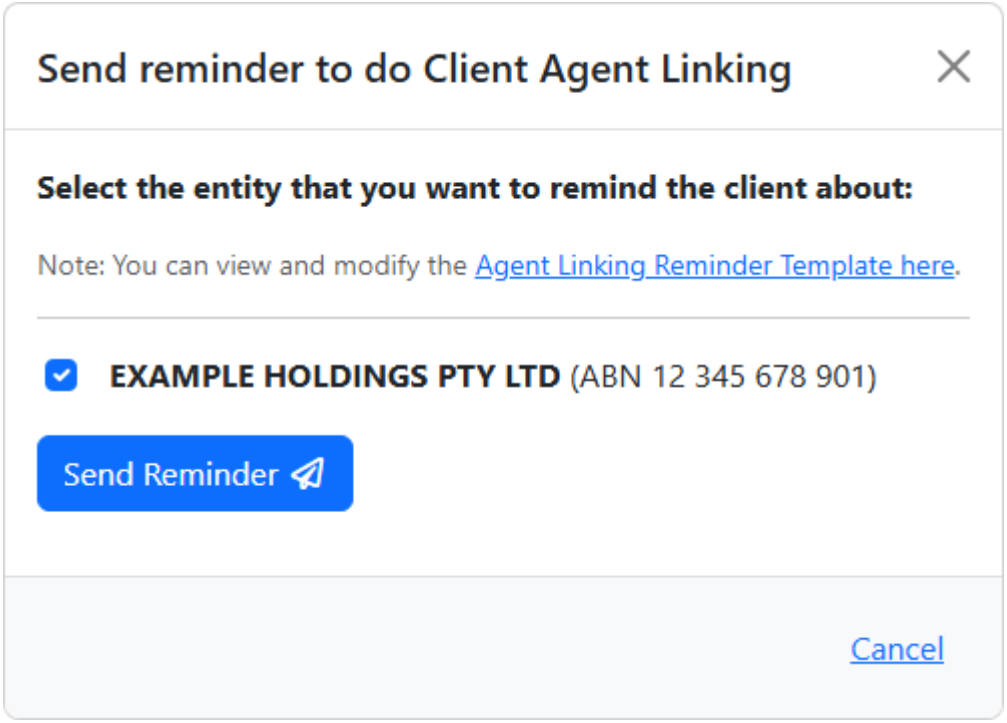
The client links

The email uses your **Agent Linking Reminder** template in **Templates**, **Comms**. It walks the client through the ATO steps, lists the entities still to link and has a button to their agent linking page. There they tick the entities they've linked and click **Update linked entities**.

4

You're told

The panel changes to **Complete** and the people you chose get the **Completed Agent Linking** notification. The reminder is recorded in the client's history.



The reminder window, with the entity ticked.

Linked, but Seamlss doesn't know? If the client linked without ticking it off, click **Update Status** on the panel, tick the entity and click **Update**. Untick it there if an XPM client shows Complete but isn't linked to you.

Something not working?

My client didn't see the instructions

Check **Show agent linking instructions** is on. They only show after an onboarding or re-engagement request, and only when it includes an entity that isn't an individual or sole trader.

I wasn't told the client finished

Check **Completed Agent Linking** is on in **Notifications** and has at least one person to send to. If the client skipped the last step, the panel won't update either: use **Update Status** .

Clients see agent linking when it's switched off, or it shows for an individual

That's a fault on our side, not your settings. **Contact support** and tell us which request or link.

There's no Client-Agent Linking panel on the record

The client is an individual or sole trader, who don't need it, or your firm isn't set up as Australian.

Still stuck? **Contact support** and tell us what you see.

More about the ATO's rule: **ATO agent linking in Seamlss**. Want a guide with your firm's details to send clients outside Seamlss? Make one with the **agent linking guide builder**.