



ATO CLIENT COMMUNICATION

User Guide

This guide explains **what the ATO Client Communication feature does**, what a firm needs before using it, and how to pull, view and download correspondence for clients through Portal360.



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SECTION 01

What This Feature Does

The **ATO** sends correspondence to taxpayers — notices of assessment, activity statement reminders, overdue payment demands, superannuation notices. It goes out by paper, email, SMS or myGov.

A registered tax agent is permitted to see the correspondence sent to their own clients. This feature pulls that correspondence into Portal360 automatically, so it appears on each client's record alongside everything else the firm holds about them — **no need to log into the ATO portal and check client by client.**

SECTION 02

Before You Start

A machine credential.

Created by the firm in the ATO's Relationship Authorisation Manager (RAM). This is the firm's identity to the ATO and is entered once during setup.

Permission in Access Manager

The credential must be granted **Client.Corro.View**. Without it, the request is accepted but nothing is returned — which looks identical to **"this client has no mail."** Worth checking first if results seem empty.

A client relationship at the ATO

The ATO only releases correspondence for clients formally linked to the firm's agent number. A client the firm works with but has not linked at the ATO will return nothing.

SECTION 03

Connecting Your Firm (One- Time Setup)

Go to Marketplace → Apps → ATO Client Communication and enter

Field	Value
Agent ABN	The practice's ABN
Agent Type	Tax Agent or BAS Agent
TAN / RAN	The registered agent number
Passphrase	The one set when the credential was created
Key store file	The .xml file from RAM, or a .p12 / .pfx

Press **Connect**.
Portal360 checks the credentials with the ATO immediately — if they are rejected, you find out right away, not a day later. Once accepted, the keystore and passphrase are encrypted and stored.

NOTE
Only one connection is active per workspace at a time.

SECTION 04

Pulling Correspondence — Three Ways

A. Sync All Clients (on demand)

Marketplace → ATO → Sync all clients

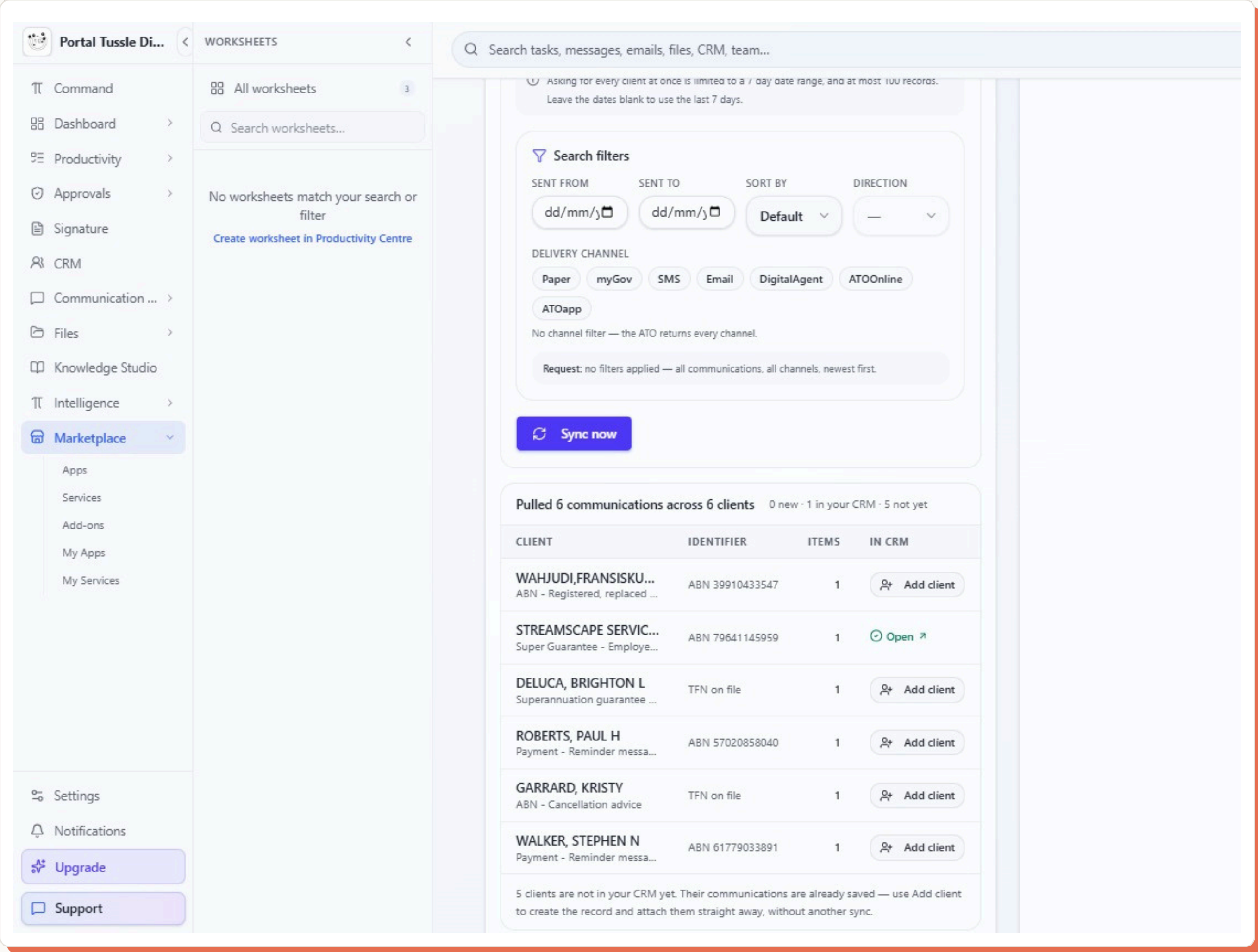
This asks the ATO for every client linked to the firm's agent number.

The screenshot displays the 'Sync clients' interface within the Portal360 application. The left sidebar contains a navigation menu with options such as Command, Dashboard, Productivity, Approvals, Signature, CRM, Communication, Files, Knowledge Studio, Intelligence, and Marketplace. The main content area is titled 'Sync clients' and includes a search bar at the top. Below the search bar, there are fields for Agent ABN (49164683532), Agent Type (Tax Agent), TAN (25509421), and Keystore File (keystore-new.xml). The 'WHEN' section offers two options: 'Now' (Answers straight away) and 'Tonight' (Overnight batch, more records). The 'WHO' section provides two choices: 'All clients' (Everyone linked to your agent number) and 'Selected clients' (Up to 20 at a time). A note indicates that asking for every client at once is limited to a 7-day date range and at most 100 records. The 'Search filters' section includes dropdowns for 'SENT FROM', 'SENT TO', 'SORT BY', and 'DIRECTION', and a 'DELIVERY CHANNEL' section with buttons for 'Paper', 'myGov', 'SMS', 'Email', 'DigitalAgent', 'ATOOnline', and 'ATOapp'. A 'Sync now' button is prominently displayed. The bottom section shows 'Overnight batches' information and a 'Window open' button.

The Sync clients screen — choose when to pull correspondence and which clients.

Because this covers the whole practice, the ATO caps the request at 7 days. Leave the dates blank to get the last week automatically.

After the sync, you get a table of every client the ATO returned, how many items each has, and whether that client already exists in the CRM:



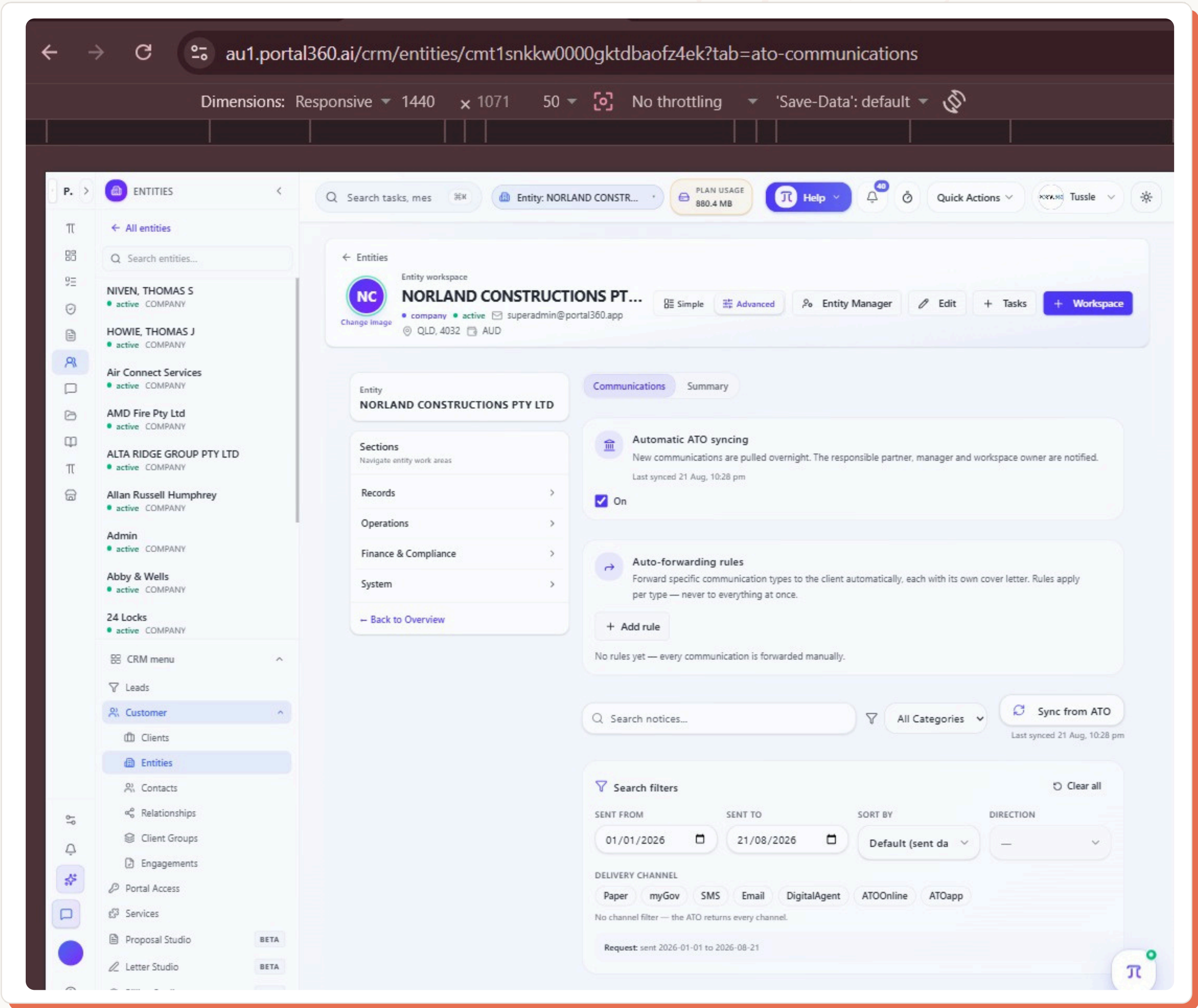
Results table – clients already in the CRM link straight through; new clients show an Add client button.

- Already in the CRM → a direct link to their ATO tab.
- Not in the CRM → an Add client button creates the record from the ATO's own data (name and ABN, no typing) and attaches the correspondence immediately.

Records for clients you choose not to add are still saved — nothing is discarded.

B. Sync One Client

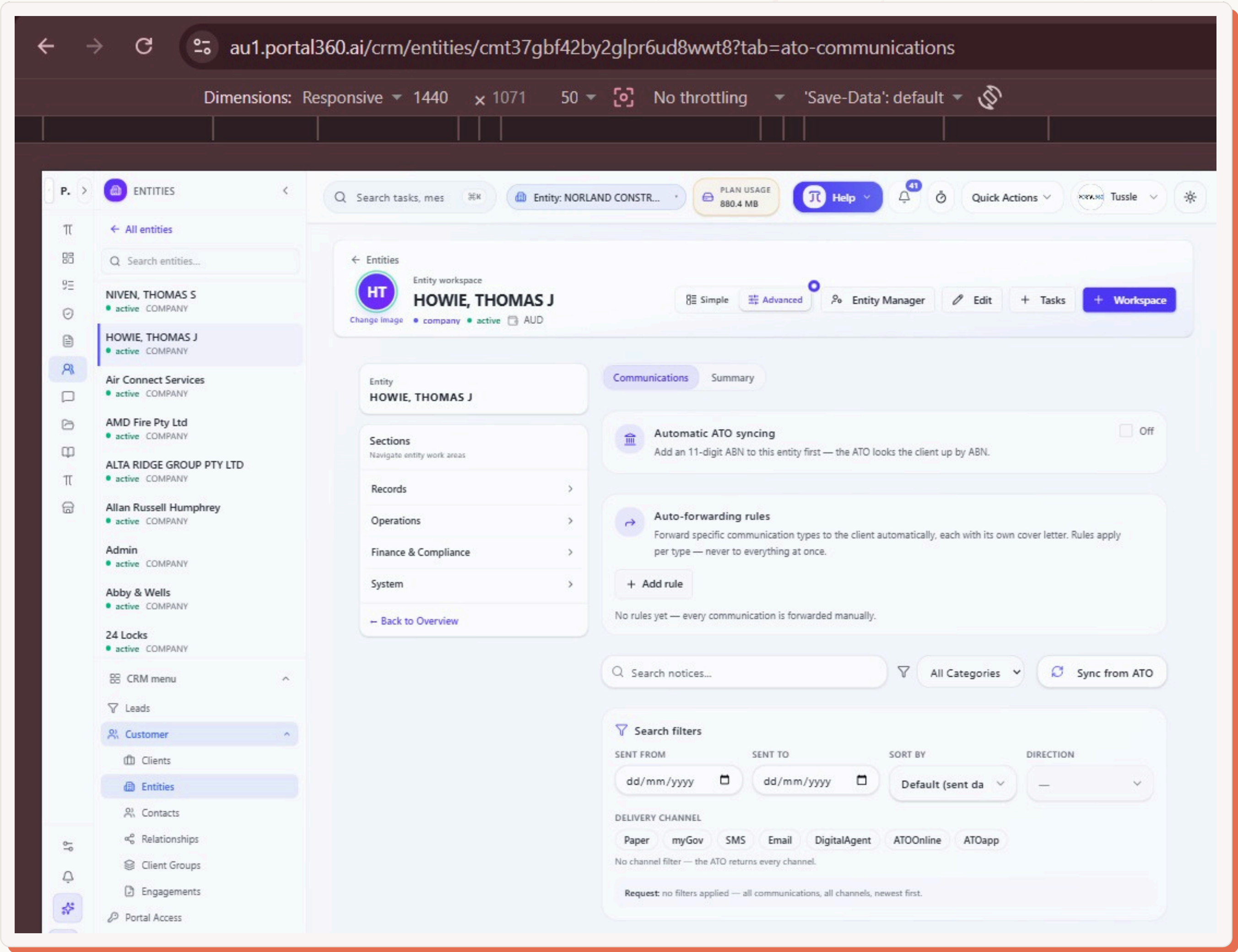
Open the client in CRM → Entities, go to their ATO tab, and use Sync from ATO.



A client's ATO tab, with Automatic ATO syncing switched on and a Sync from ATO button.

Because this names one client, the ATO allows a wider window — up to 10 years of history in a single request. Leave the dates blank for the widest history available.

The client must have an ABN on their CRM record. Without one there is nothing to identify them to the ATO, and the screen tells you so:



Without an ABN on file, Automatic ATO syncing cannot be turned on for that client.

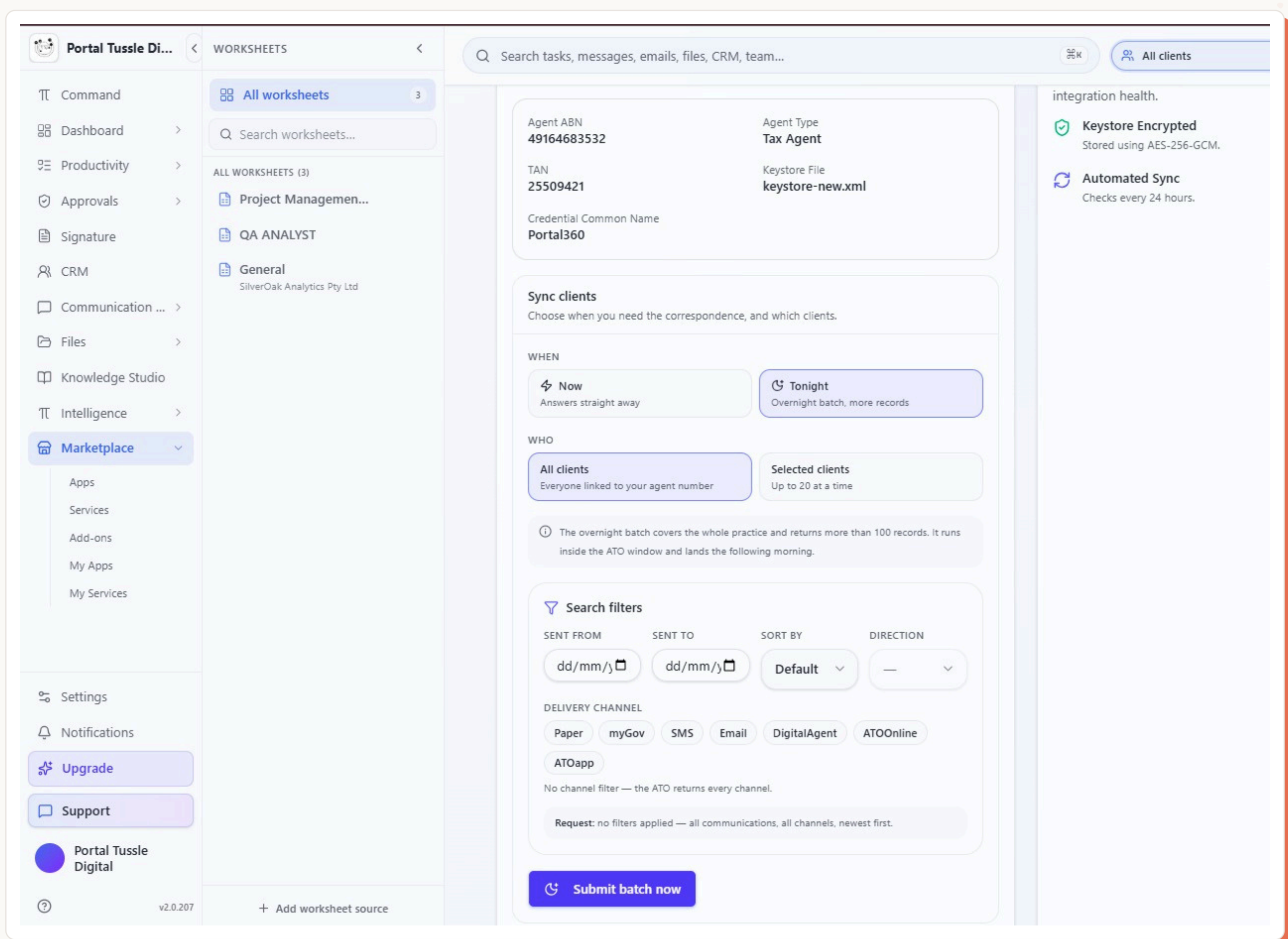
If a client has no ABN, use Sync all clients instead, then Add client from the results.

C. Automatic Overnight Sync

Two overnight runs happen automatically once a firm is connected — no setup required for the first one.

- the practice batch. Runs every night for the whole practice (last 7 days, the ATO's limit for a request naming no clients). Connect once, and correspondence is filed against matching clients by the next morning.
- The per-client sync. Optional, for deeper history. Runs at 2:10am for clients where Automatic ATO syncing is switched on and the client has an ABN. This reaches back up to 10 years, versus 7 days for the practice batch.

A manual overnight batch can also be triggered on demand by choosing Tonight instead of Now on the sync screen:



Choosing "Tonight" queues a batch that is submitted inside the ATO's overnight window.

If a client's mail is not appearing, check the ABN on their CRM record first — that is how a document is matched to a client, not the sync switch.

SECTION 05

Search Filters

The same filter panel appears on both the all-clients and single-client sync screens:

Filter	What it does
Sent from / Sent to	Date range. Left blank, the widest range the ATO allows is used.
Sort by	Sent date.
Direction	Ascending or descending.
Delivery channel	Paper, myGov, SMS, Email, DigitalAgent, ATOOnline, ATOapp. None selected returns all channels.

The line beginning **Request:** under the filter panel shows exactly what will be sent to the ATO.

SECTION 06

Viewing and Downloading a Document

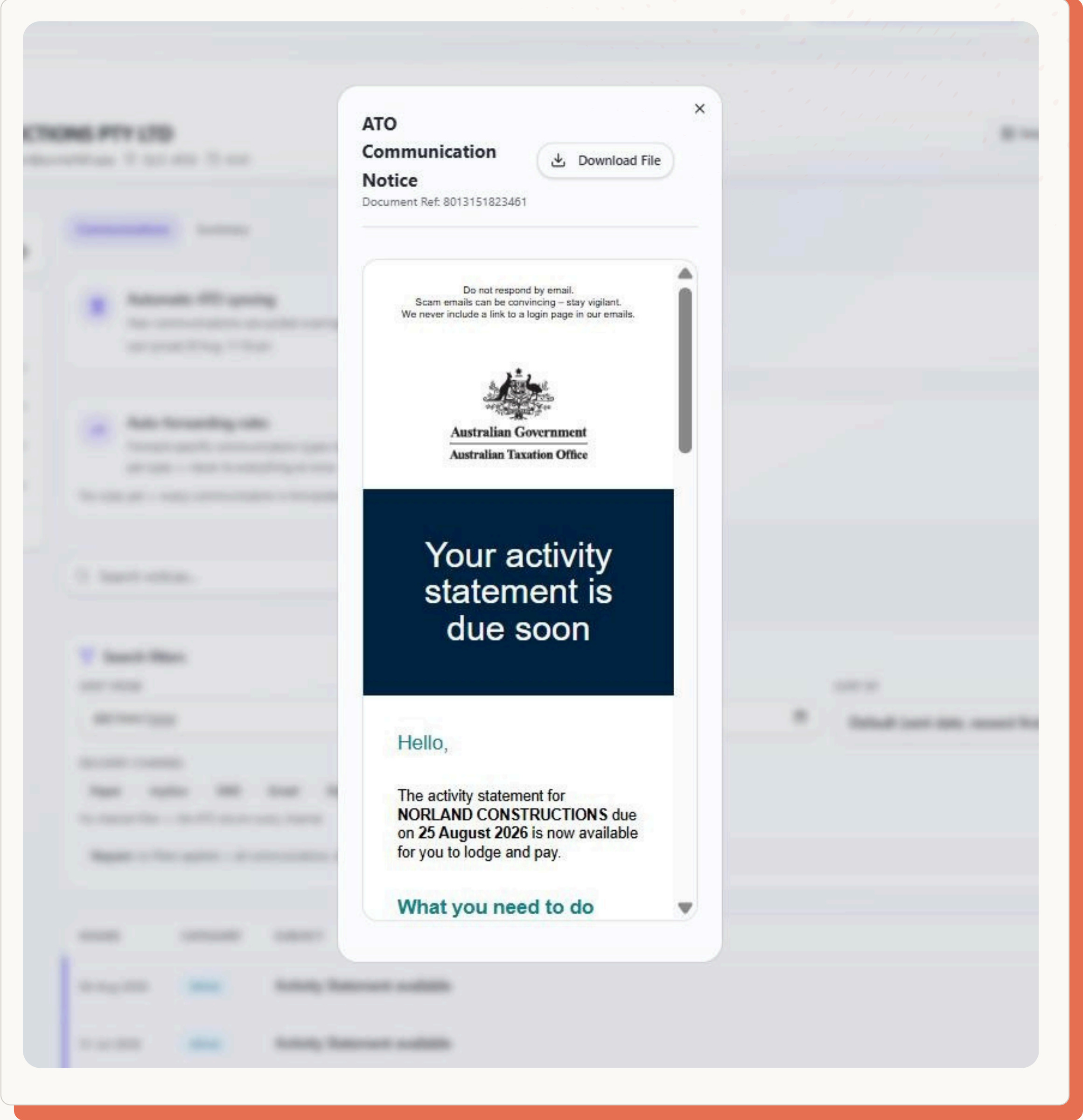
Once correspondence has been pulled, it appears in a list on the client's ATO tab with its date, category, subject and channel:

The screenshot displays the Portal 360 interface for the entity NORLAND CONSTRUCTIONS PTY LTD. The top navigation bar includes a search bar, entity name, plan usage, help, and quick actions. The left sidebar shows sections like Records, Operations, Finance & Compliance, and System. The main content area has tabs for Communications and Summary. The Communications tab is active, showing a list of notices. The list has columns for ISSUED, CATEGORY, SUBJECT, CHANNEL, STATUS, and ACTIONS. Two notices are visible: one dated 04 Aug 2026 and another dated 31 Jul 2026, both categorized as 'Advise' and titled 'Activity Statement available'. The ACTIONS column for each notice includes 'View' and 'Forward' options.

ISSUED	CATEGORY	SUBJECT	CHANNEL	STATUS	ACTIONS
04 Aug 2026	Advise	Activity Statement available	Email	Unread	View Forward
31 Jul 2026	Advise	Activity Statement available	Email	Unread	View Forward

Each item can be opened with View or sent on with Forward.

Selecting View opens the original notice, exactly as the ATO issued it, with a Download File option:



The document viewer – the actual notice content, downloadable as a file.

SECTION 07

What Happens After Correspondence Arrives

- It appears on the client's ATO tab — date, type, subject, channel and read status, with unread items marked.
- People are notified — the responsible partner, responsible manager and workspace owner.
- It can be forwarded automatically — auto-forwarding rules are set per communication type, each with its own cover letter, never as a blanket rule. A communication is never forwarded twice, even if a later sync returns it again.
- It is recorded in the audit trail — forwarded emails appear in the client's history alongside everything else.

SECTION 08

When Something Goes Wrong

Failures are shown in plain language, with what to do about them:

What you see	What it means
Date range too wide	The range exceeds what the ATO allows for that type of request. Narrow it.
Client not linked	The client has not authorised this agent at the ATO. Not a fault – a link that needs creating at the ATO end.
Client not found	The ATO does not recognise the ABN or TFN on the client's record.
Product registration problem	Paper, myGov, SMS, Email, DigitalAgent, ATOOnline, ATOapp. None selected returns all channels.

SECTION 08

Good to Know

- An empty result is not a bug. ATO correspondence clusters around lodgement dates — a quiet week can genuinely return nothing.
- Unmatched is not an error. A whole-of-practice pull covers the agent's entire client book, most of which will not yet be in the CRM. Those records are saved and listed, and one click adds the client.
- A client with no ABN cannot be synced individually. Use Sync all clients, then Add client from the results.
- Check Access Manager before assuming a problem. A missing Client.Corro.View permission produces an accepted request that returns nothing — indistinguishable from a client with no mail.