

Fringe Benefits Tax Job Process Automation



About this automation:

Streamline your Fringe Benefits Tax jobs by auto-creating email communication, workpapers and internal tasks.



Simply import the sample automation, customise to suit your practice, test and activate!

Job

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Fringe Benefits Tax
Marshall, Frank

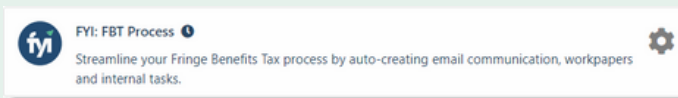
HIGH

HIGH

MEDIUM

What's included:

- ✓ Reminder Odometer Email Template
- ✓ FBT Workpaper Template
- ✓ Automation Process Steps



Knowledge			
Templates			
Type	Template Name	Modified on	Status
<input type="checkbox"/>	FYI: FBT Workpaper	16 Sep 2024 14:01	Draft
<input type="checkbox"/>	FYI: Motor vehicle odometer reading required on 31 March	13 Sep 2024 14:50	Draft

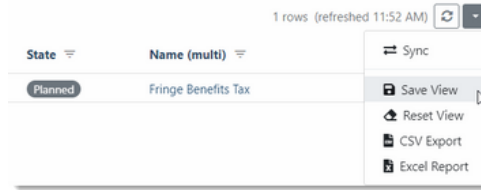
Step	Application	Action
# 1	FYI Actions	<p>Create Email</p> <ul style="list-style-type: none"> An Email will be created from the "FYI: Motor vehicle odometer reading required on 31 March" template The document will be AutoFiled <p>Notes</p> <p>Consider updating the Sender to the appropriate User.</p> <p>Consider updating the Workflow Approval to the appropriate User.</p>
# 2	FYI Actions	<p>Create Spreadsheet</p> <ul style="list-style-type: none"> An Excel document will be created from the "FYI: FBT Workpaper" template The document will be AutoFiled A task will be created with the subject "Assess FBT obligations & complete workpaper" <p>Notes</p> <p>Task is Assigned to the Job Custom User Role : Accountant. Consider updating Task Assignee to an appropriate User Role.</p>
# 3	FYI Actions	<p>Create Task</p> <ul style="list-style-type: none"> A task will be created with the subject "Assess electric cars exemption and associated reportable fringe benefits amounts" <p>Notes</p> <p>Task is Assigned to the Job Custom User Role : Accountant. Consider updating Task Assignee to an appropriate User Role.</p>

How to import:

Before you begin - ensure your Jobs View has been saved.

- State = Planned
- Filter on Name (multi) = Fringe Benefits Tax or FBT job names.

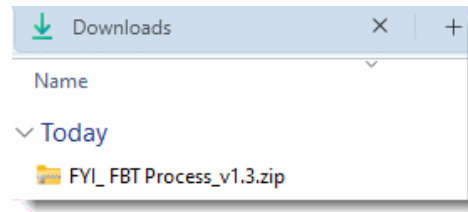
The automation will run for all FBT jobs that are in the job state of planned.



Step 1 - Save the import file locally

The first step is to download the zip file provided in FYI's help centre.

Simply save the file locally, for example, in your Windows Explorer Downloads folder. You do not need to extract the files.



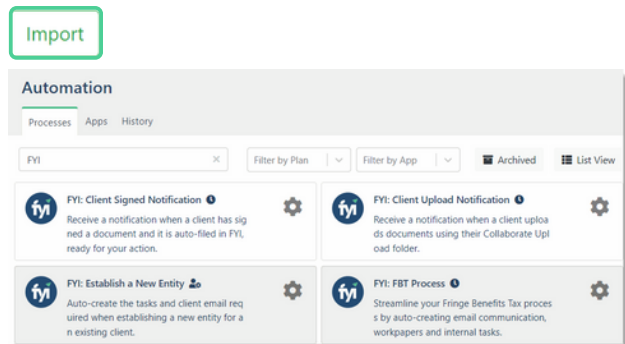
Step 2 - Import the files into FYI

Navigate to the Automations screen and click the Import button on the right-hand side of the screen.

Locate and select your saved "FBT Process" file and click Open to import the automation.

You can also drag and drop the zip file to the Automation list view.

The Process and Templates will be imported into FYI.



Step 3 - Review the process

Review the templates

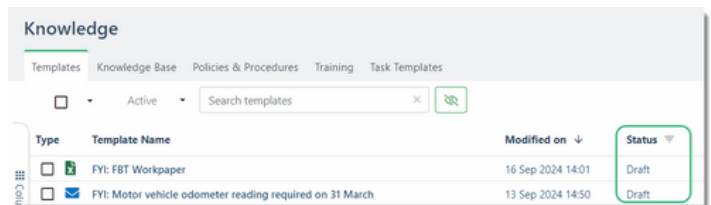
Locate the templates in Knowledge - Templates. The templates will import with the prefix FYI making them easy to locate.

- Review and personalise the imported templates
- Update the template Status to Active.

Edit and review the process and each process step

The Process is imported with the Trigger set to Schedule, to run every 24 hours over a set date range.

- Update the Filter and select your FBT view
- Review the schedule and owner
- Review and update each process step. Specific comments have been added to the steps where action is required. These will display in blue.



Step 4 - Test and run the automation

Click the Test button to display a list of the Jobs and associated Clients.

From Select Test Job, search and select a specific job to run the test for and select Run Test.

Review the test from the Client workspace.

When ready, set the Status to Active. The process will run automatically according to the schedule.

