GST Return Job
Process Automation

About this automation:

Streamline the processing of your GST returns with auto-create of workpapers and internal tasks.

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

What's included:

- ✅ GST Workpaper Template
- ✅ Automation Process Steps

How to import:

Before you begin - ensure your **Jobs View** has been saved with the required filters.
- Start date = Next week
- Search jobs = BAS

The automation will run for all BAS jobs starting next week.
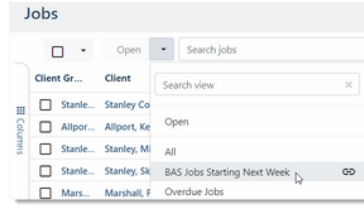
Step 1 - Save the import file locally

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

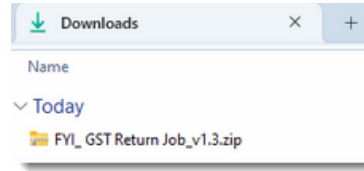Simply save the file locally, for example, in your Windows Explorer Downloads folder. You **do not** need to extract the files.
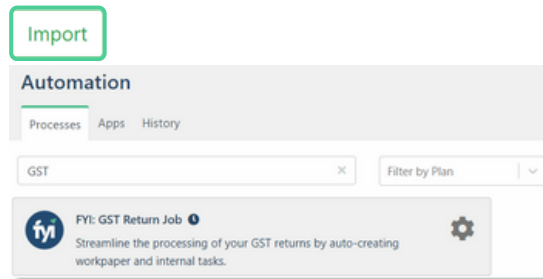
Step 2 - Import the files into FYI

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

Locate and select your saved "GST Return Job" 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.

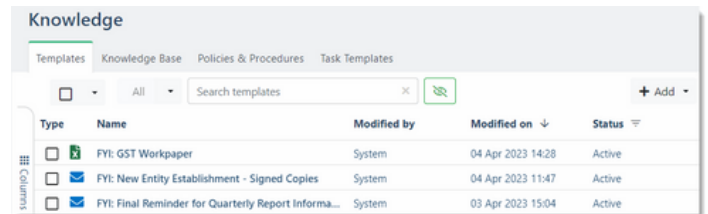## Step 3 - Review the process

Review the Template
Locate the template in **Knowledge** - **Templates.**
The template 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 Each Process Step
This process uses the custom view you created.

- Update the Filter and select your BAS jobs 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 client to run the test for and select **Run Test**.

Review the test by clicking the **View History link**, or from the Client workspace.

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