

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!

Step	Application	Action
#1	FYI Actions	<p>Create Spreadsheet</p> <ul style="list-style-type: none"> An Excel document will be created from the "FYI GST Workpaper" template The document will be AutoFiled A task will be created with the subject "Review & Reconcile Xero File - {[TriggerClientName]}" <p>Notes Task is Assigned to the Job Custom User Role: Accountant. Consider updating Task Assignee to an appropriate User Role.</p>
#2	FYI Actions	<p>Create Task</p> <ul style="list-style-type: none"> A task will be created with the subject "Review Tax Office lodgements & reports - {[TriggerClientName]}" <p>Notes 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 "Prepare GST Return - {[TriggerClientName]}"

What's included:

- ✓ GST Workpaper Template
- ✓ Automation Process Steps

FYI: GST Return Job ⓘ

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

Knowledge				
Type	Name	Modified by	Modified on	Status
	FYI: GST Workpaper	System	04 Apr 2023 14:28	Draft
	FYI: New Entity Establishment - Signed Copies	System	04 Apr 2023 11:47	Active
	FYI: Final Reminder for Quarterly Report Informa...	System	03 Apr 2023 15:04	Active

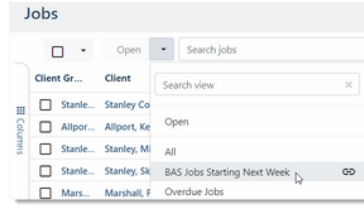
FYI_ClientName		
GST Worksheet		
Sales - GST Collected		
Details	Sales	Collected
Total Amounts \$ - \$ -		
Item Number	G1	1A
Expenses - GST Paid		
Details	Purchases	Paid

How to import:

Before you begin - ensure your Jobs View has been saved with the required filters.

- Start date = Next week
- Search jobs = BAS

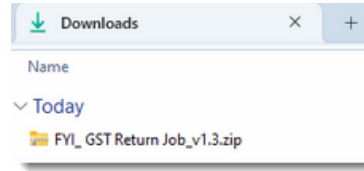
The automation will run for all BAS jobs starting next week.



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.



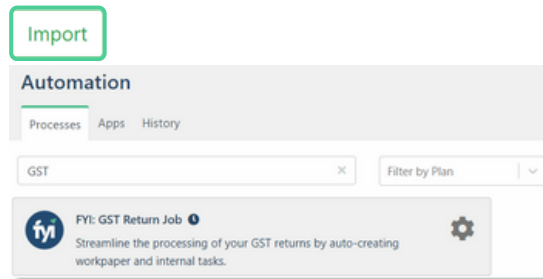
Step 2 - Import the files into FYI

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

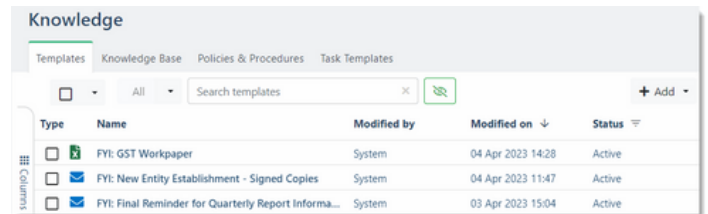
Locate the template in Knowledge - Templates. The template will import with the prefix FYI making them easy to locate.

- 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	Application	Action
1	FYI Actions	Create Spreadsheet • An Excel document will be created from the 'FYI: GST Workpaper' template • The document will be AutoFiled • A task will be created with the subject 'Review & Reconcile Xero File - [TriggerClientName]' Notes Task is Assigned to the Job Custom User Role: Accountant. Consider updating Task Assignee to an appropriate User Role.
2	FYI Actions	Create Task • A task will be created with the subject 'Review Tax Office Judgements & reports - [TriggerClientName]' Notes Task is Assigned to the Job Custom User Role: Accountant. Consider updating Task Assignee to an appropriate User Role.
3	FYI Actions	Create Task • A task will be created with the subject 'Prepare GST Return - [TriggerClientName]'

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.

