

GST Return Job



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	Create Spreadsheet <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" Notes Consider updating Task Assignee to an appropriate User Role.	🔗 📄 🗑️
2	FYI Actions	Create Task <ul style="list-style-type: none"> A task will be created with the subject "Review Tax Office lodgements & reports" Notes Consider updating Task Assignee to an appropriate User Role.	🔗 📄 🗑️
3	FYI Actions	Create Task	🔗 📄 🗑️

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.

	A	B	C
1	{{ Name }}		
2			
3	GST Worksheet		
4			
5			
6	Sales - GST Collected		
7			
8	Details	Sales	Collected
9			
10			
11			
12			
13			
14			

fyi Home Clients Jobs Tasks Documents Automation Knowledge Practice
Search groups, clients or jobs

Templates

👕 Create 📖 Read 🔗 Doc Link 📄 Export Cancel

<input type="checkbox"/>	Ty...	Name	Modifie...	Modifie...	Status
<input type="checkbox"/>	📄	FYI: Engagement Letter	Liz Hurst	03/12/2021 11:15	Active
<input type="checkbox"/>	📄	FYI: Tax Letter	Liz Hurst	03/12/2021 09:09	Active
<input type="checkbox"/>	📄	FYI: Year End Checklist	Liz Hurst	25/11/2021 15:31	Active
<input checked="" type="checkbox"/>	📄	FYI: GST Workpaper	Liz Hurst	25/11/2021 14:02	Active
<input type="checkbox"/>	📄	FYI: New Entity Establishment - Signed ...	Liz Hurst	24/11/2021 13:44	Active
<input type="checkbox"/>	📄	FYI: EOY Workpapers	Liz Hurst	24/11/2021 13:36	Active
<input type="checkbox"/>	📄	FYI: Year End Queries	Liz Hurst	18/11/2021 14:54	Active

Spreadsheet ✕

FYI: GST Workpaper

Reference 895553

Filing changed by Liz Hurst on 02/12/2021

Last saved by Liz Hurst on 25/11/2021

Created by Liz Hurst on 24/11/2021

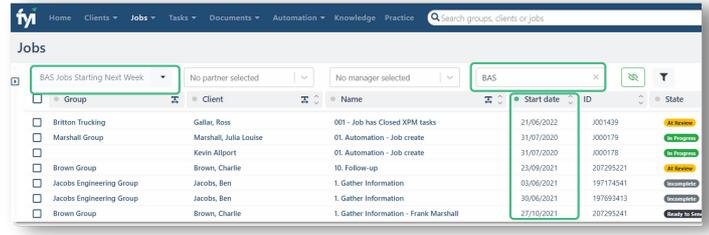
Filing

AutoFile Defaults

How to import:

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

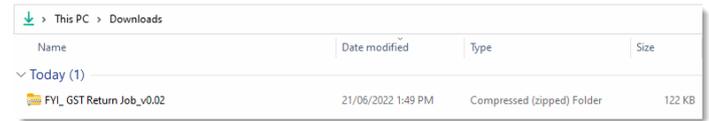
- Start date - Next week
- Search jobs - BAS



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.



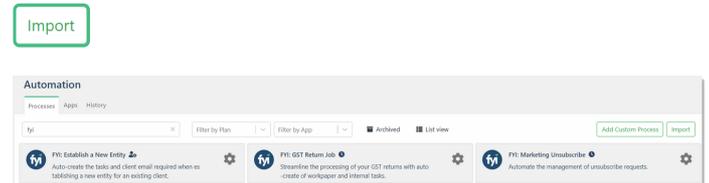
Step 2 - Import the files into FYI

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

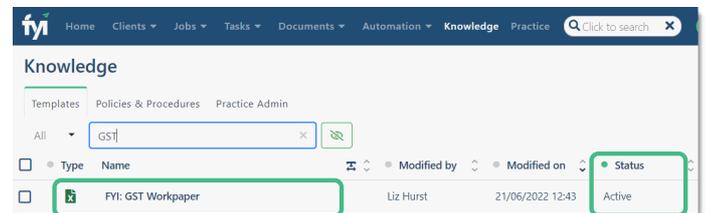
Locate the template in Knowledge - Templates. The templates will import with the prefix FYI making them easy to locate.

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

Edit and Review Each Process Step

The Processes are imported with the Status set to Draft. You can locate the process by searching in the "Search processes" field.

- 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.



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#1	FYI Actions	Create Spreadsheet <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" Notes Consider updating Task Assignee to an appropriate User Role.
#2	FYI Actions	Create Task <ul style="list-style-type: none"> • A task will be created with the subject "Review Tax Office lodgements & reports" Notes Consider updating Task Assignee to an appropriate User Role.
#3	FYI Actions	Create Task

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.

