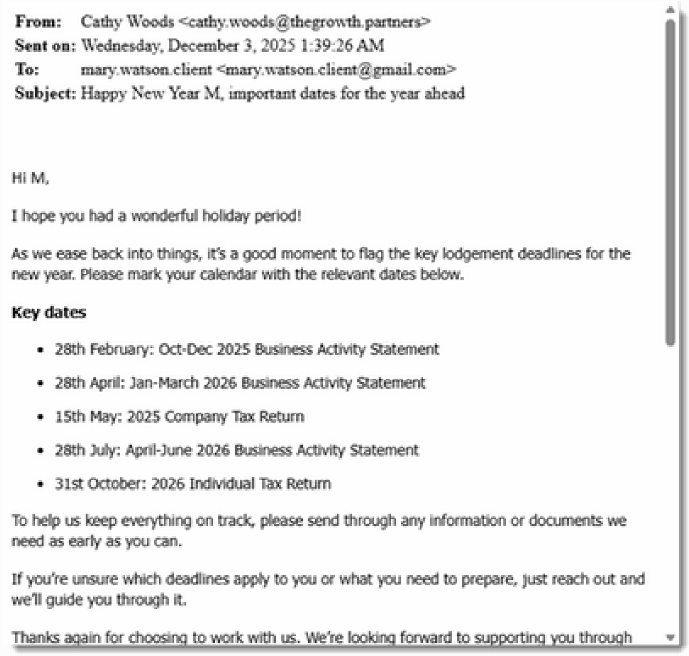
Lodgement Deadlines Email

Process Automation

About this automation:

Use this process to communicate key lodgement dates with your clients for the upcoming year.

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


From: Cathy Woods <cathy.woods@thegrowth.partners>
Sent on: Wednesday, December 3, 2025 1:39:26 AM
To: mary.watson.client <mary.watson.client@gmail.com>
Subject: Happy New Year M, important dates for the year ahead

Hi M,

I hope you had a wonderful holiday period!

As we ease back into things, it's a good moment to flag the key lodgement deadlines for the new year. Please mark your calendar with the relevant dates below.

Key dates

- 28th February: Oct-Dec 2025 Business Activity Statement
- 28th April: Jan-March 2026 Business Activity Statement
- 15th May: 2025 Company Tax Return
- 28th July: April-June 2026 Business Activity Statement
- 31st October: 2026 Individual Tax Return

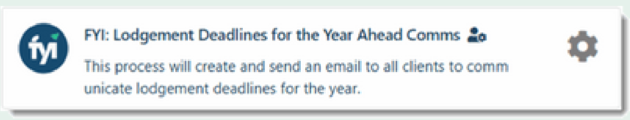
To help us keep everything on track, please send through any information or documents we need as early as you can.

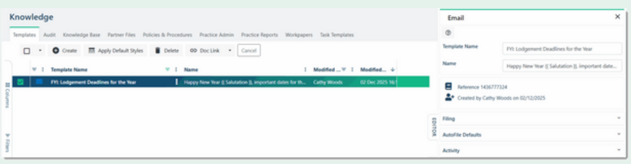
If you're unsure which deadlines apply to you or what you need to prepare, just reach out and we'll guide you through it.

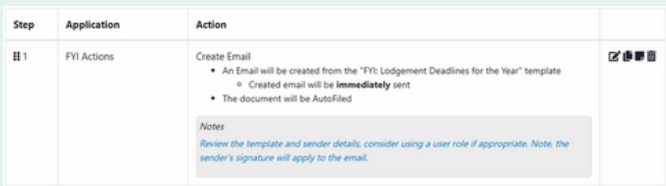
Thanks again for choosing to work with us. We're looking forward to supporting you through

What's included:

- Office Closure Email Template
- Automation Process Step

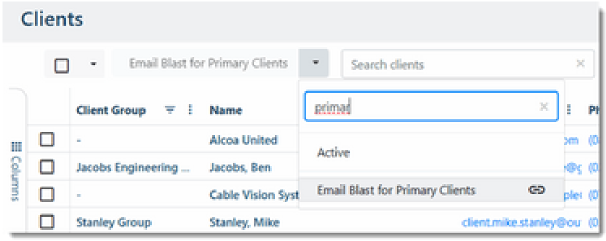






How to import:

Before you begin - ensure your **Client View** has been saved in Client list. We recommend using a Primary Client list to ensure each client receives one email. For more on how to configure this view refer to [this article](#).

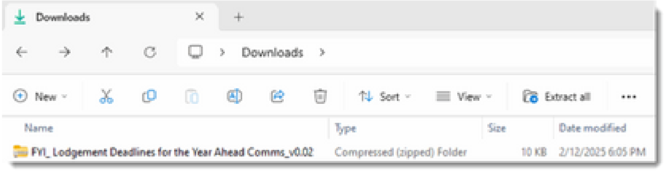


Step 1 - Save the import file locally

The first step is to download the zip file provided.

[Click here to download](#).

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

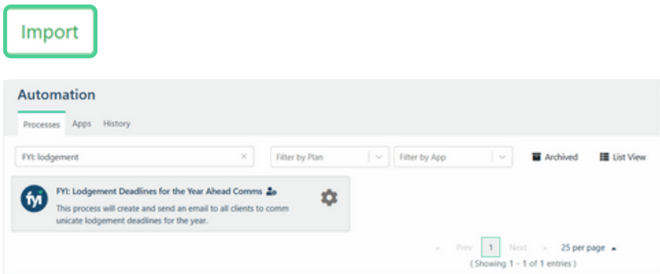


Step 2 - Import the files into FYI

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

Locate and select your saved "Lodgement Deadlines for the Year Ahead Comms" 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.

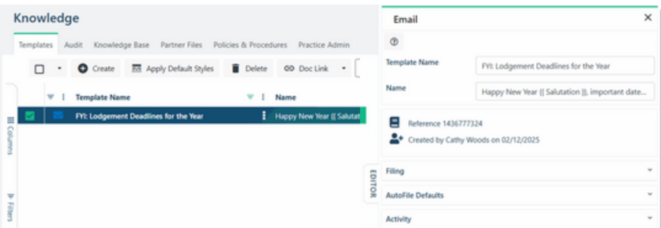


Step 3 - Review the process

Review the Template

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

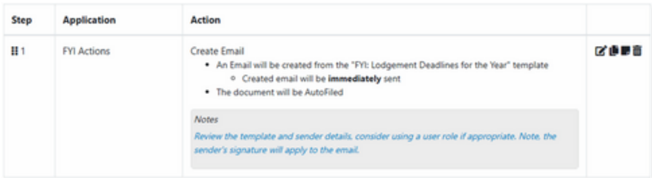
- Review and personalise the imported templates
- Update the template **Status** to Active.



Edit and Review Each Process Step

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

- Review the **Filter** and select the required 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

You can test a Scheduled Custom Process directly from the Process itself and this can be done while the Process is still "Draft".

Click the **Test** button to display a list of the Documents and Clients based on the Filter that has been selected.

From the Select Test pop-up, search and select a document to run the test for and select **Run Test**. Note: this will send an email to the selected client, consider testing on a sample client to check the end result.

When ready, set the **Status** to Active.