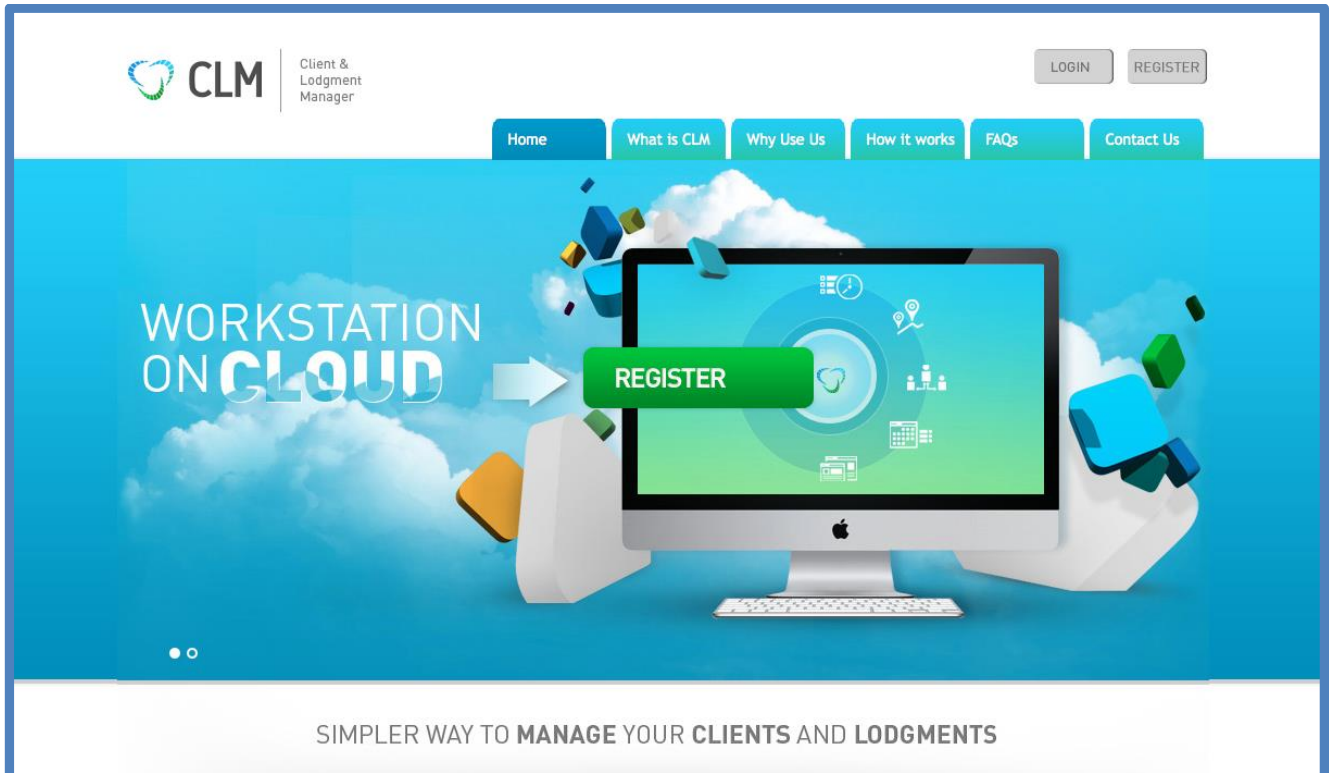
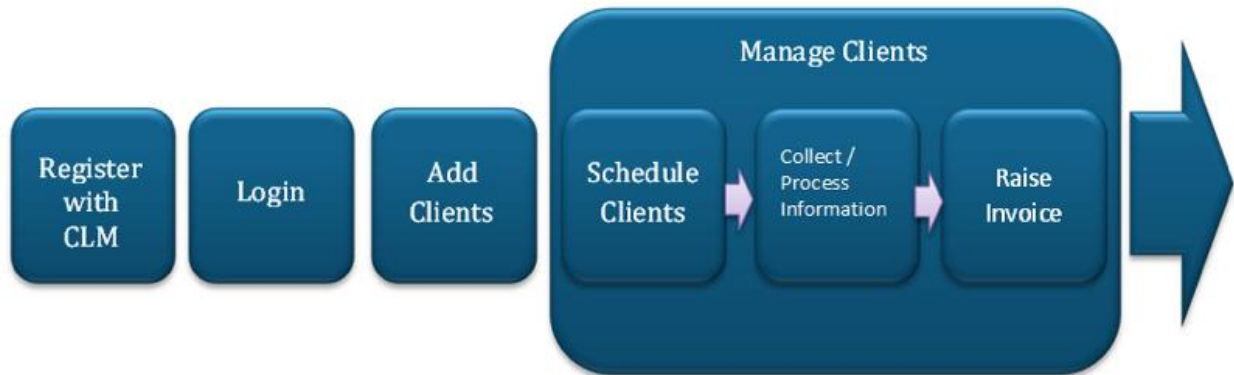


Gov Reports CLM



Get Ready Quick Guide

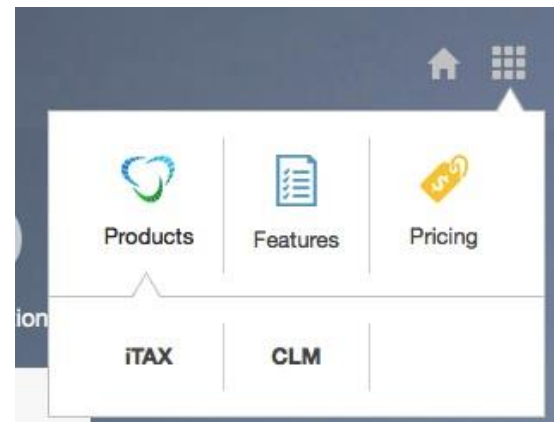




How to Register for CLM

NEW Users www.govreports.com.au

1. Select Registration on GovReports main website
 - a. Top Right hand screen, select:- grid, products & CLM this then transfers you to the CLM 'sign-on' screen
 - b. Select Register tab on CLM website
 - c. Register with CLM by entering your agent number, name, email and address
2. Select your membership type
 - a. Enter the membership number if you are a member of ICB
3. Enter your credit card details and register



Existing GovReports Users

<https://clm.govreports.com.au/>

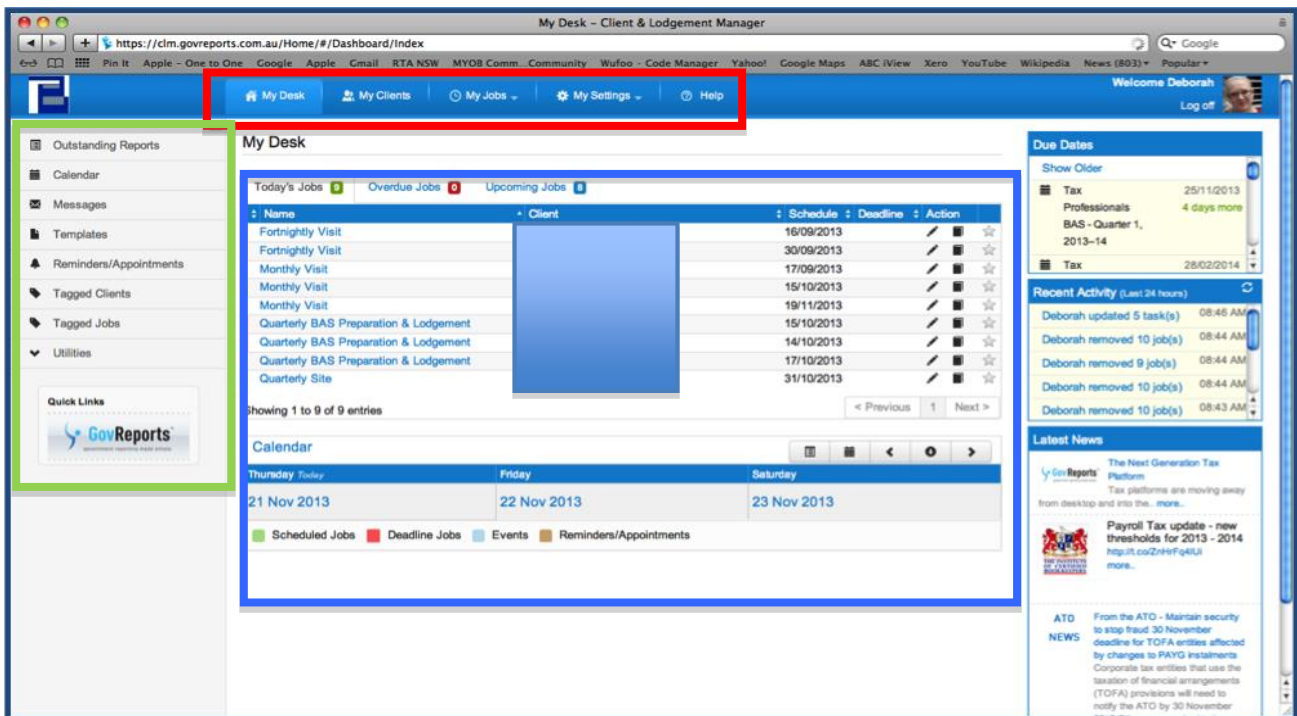
Who is an existing user?

Existing users are those with existing GovReports account.

1. Select Registration on GovReports main website
 - a. Top Right hand screen, select : grid, products & CLM this then transfers you to the CLM 'sign-on' screen
 - b. Select Register tab on CLM website
 - c. If you are already user of GovReports - Click the Checkbox
 - d. Enter your GovReports username and password to register with CLM
2. Select your membership type
 - a. Enter the membership number if you are a member of ICB
3. Enter your credit card details and register

CLM Dashboard = My Desk

When you 'Log in' your screen opens to 'My Desk' – the dashboard for CLM



- **Top Menu:** My Clients, My Jobs, Time Billing, My Settings & the Help screen. Select each section directly from this top toolbar & to return to the dashboard, select 'My Desk'
- **Sidebar (left Navigator)** Navigate to Outstanding Reports, Calendar, Messages, **Templates**, Reminders/Appointments, tagged clients or jobs & the Utilities. Use this sidebar to log onto Gov Reports. Even though the sidebar can be hidden, this is the only place you can select Templates.
- **Today's, Overdue & Upcoming Jobs – Body of My Desk** Opens with Today's Jobs visible. Quickly navigate to Overdue or Upcoming Jobs. Overdue jobs shows jobs that have not meet deadline set. Upcoming jobs shows jobs you have setup for the future.
- **Calendar** The Calendar can be viewed here: the next 3 days/previous 3 days/today. If you select Weekly or Monthly view you are taken to the Calendar screen

Right hand Sidebar: Timer, Due Dates, Recent Activity & Latest News. Are available on the right side of **My Desk**. Hover your mouse over each section and they popout for you to see the applicable information.

Get Ready Quick

How to get started in 4 Steps for Business Lodgments/Preparation

This manual gives you all the detail to make use of the system, but how do we get started?

Let's make a 'Quick-Start' for a BAS Agent/Bookkeeper. The common areas a BAS agent requires help is planning all the LODGMENTS on a monthly, quarterly or yearly basis. A Bookkeeper may not lodge but still does all the preparatory work and therefore is still locked into the lodgment dates

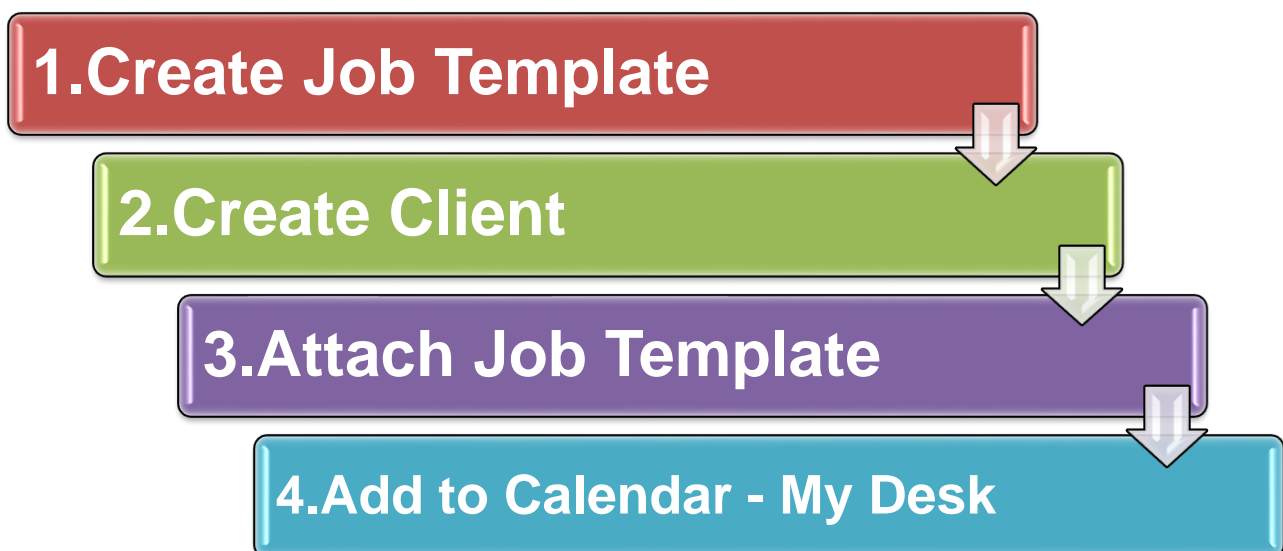
Lodgments for the year covering 10 clients, may consist of:

- 8 clients x 4 BAS Quarters
- 2 clients x 12 Monthly BAS/IAS
- 8 clients x 4 Superannuation Payments
- 2 clients x 12 Superannuation Payments
- 2 clients x 12 Payroll Tax instalments
- 2 clients x 'Annual Payroll Tax' Return
- 7 clients x EOY/EMPDUPE Payment Summaries
- 2 clients x TPAR returns

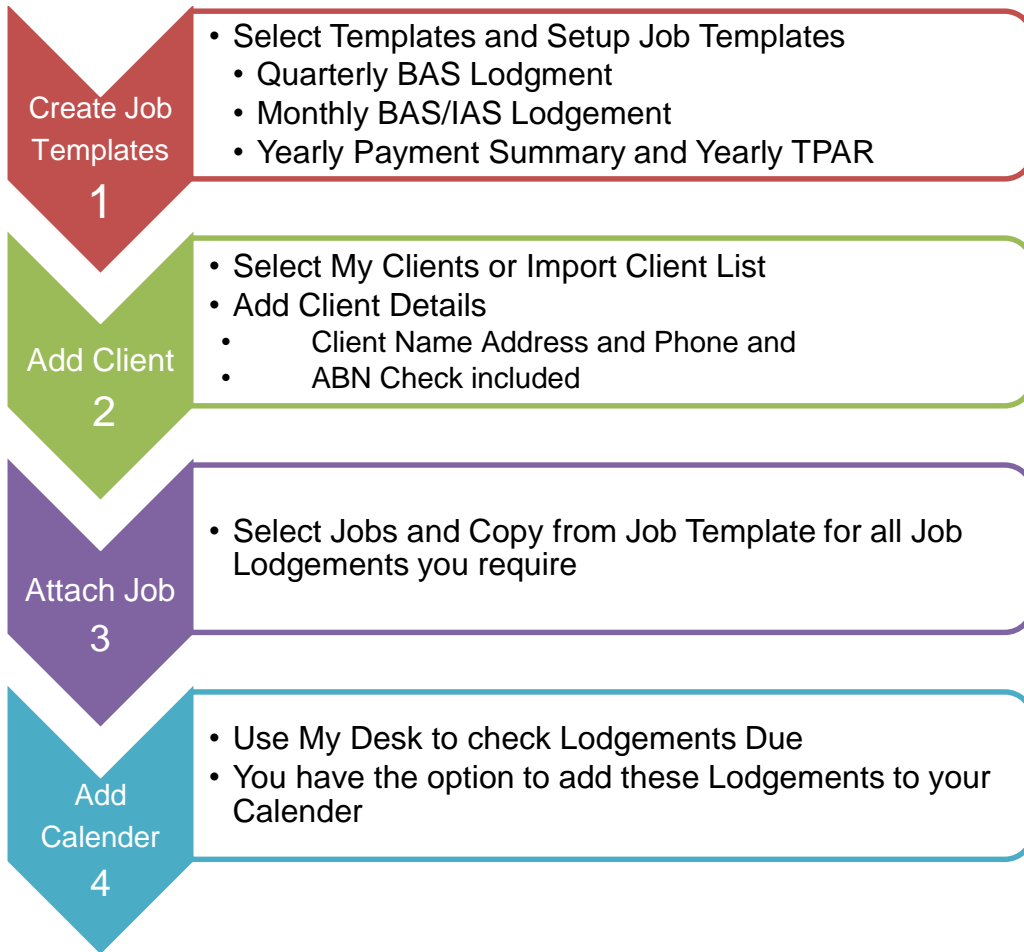
That is 147 deadlines you will need to meet over the 12 months. Of course, more clients, more deadlines to meet. So we need to quickly enter our deadline/lodgment reminders. Initially we don't need the tasks & the templates entered just the jobs.

It isn't necessary to even know the date of the appointment at this stage, use the beginning of the month as the start date and the ATO due dates as the end date

4 Step Quick Set up i.e. **Quarterly BAS Lodgments** for all our clients, for 1 or 4 Quarters



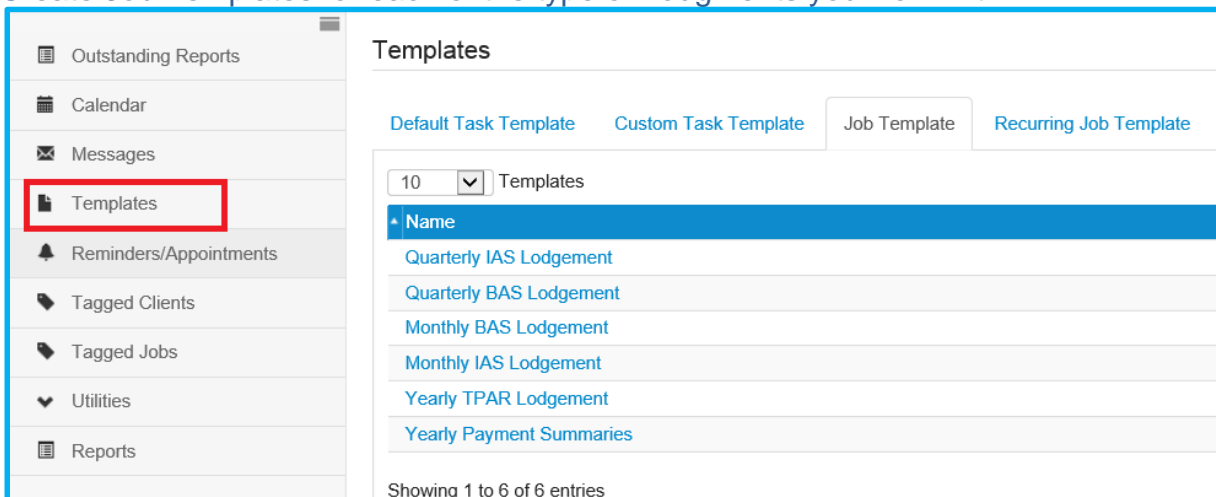
4 Quick Steps for Lodgment/Preparation Plan



Step 1- Add Job Templates and Recurring Jobs

Using the Side Bar Select Templates

Create Job Templates for each of the type of Lodgments you work with



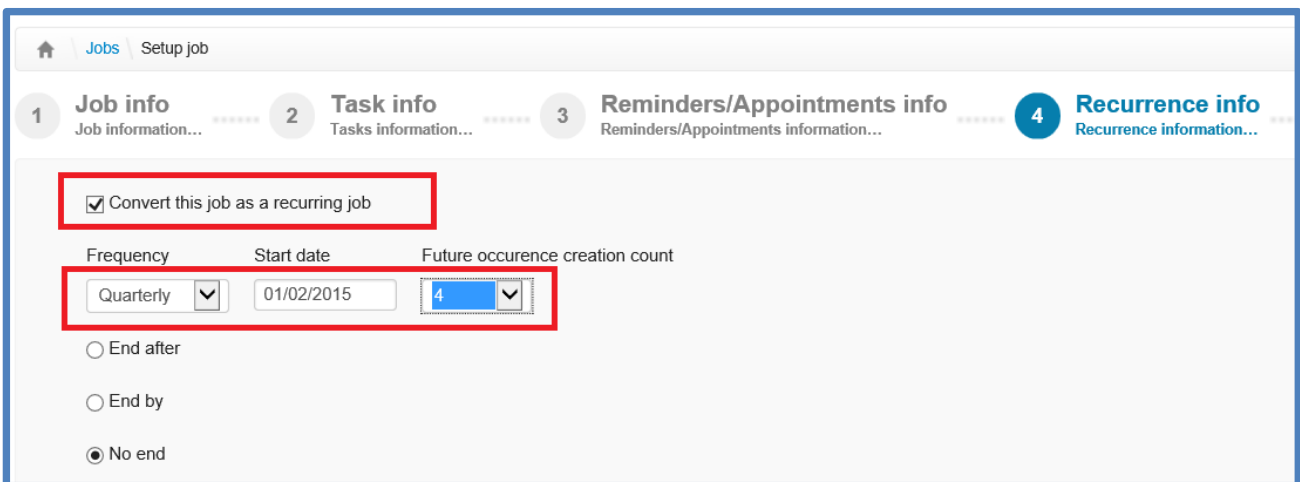
The screenshot shows the 'Templates' section in the side bar, which is highlighted with a red box. The main content area displays a list of templates under the 'Job Template' tab. The list includes:

- Quarterly IAS Lodgement
- Quarterly BAS Lodgement
- Monthly BAS Lodgement
- Monthly IAS Lodgement
- Yearly TPAR Lodgement
- Yearly Payment Summaries

At the bottom of the list, it says 'Showing 1 to 6 of 6 entries'.

Step to Setup Job Template

- Step 1: Go to Templates > Click New Job Template
- Step 2: Name Template ie Yearly Payment Summaries
- Step 3: Select Initial start and deadline dates
- Step 4: Ignore Client at this point
- Step 5: Ignore Task Information
- Step 6: Ignore Reminders/Appointments
- Step 7: Make sure you set this job up as a recurring – tick ‘Convert to recurring job, select frequency & future date creation occurrence – say 4 for a quarterly client, that’s a year’s appointments

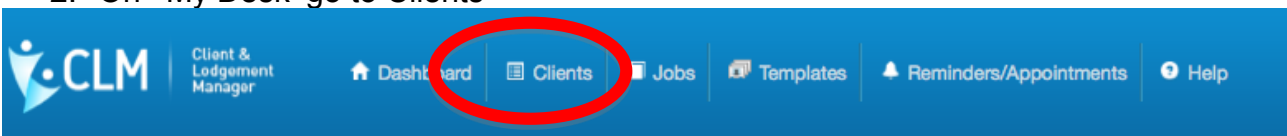


Step 2 - Add Client Manually (CLM has an option to Import Client List)

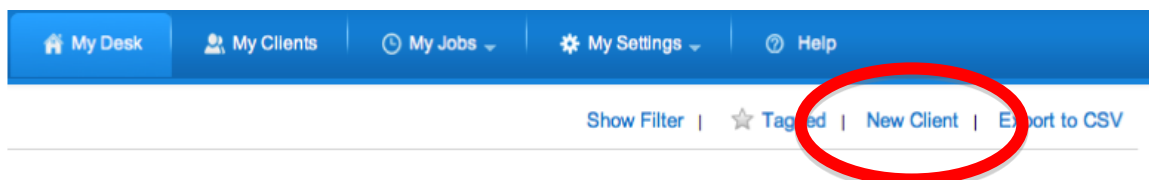
To manually input clients

Create a new client by entering client name (either business or individual name) and contact details required. Once you reach Contact info, you can either save & finish or continue with other steps.

1. Gather all your clients data
2. On ‘My Desk’ go to Clients



3. Then on the right hand side, select New Client



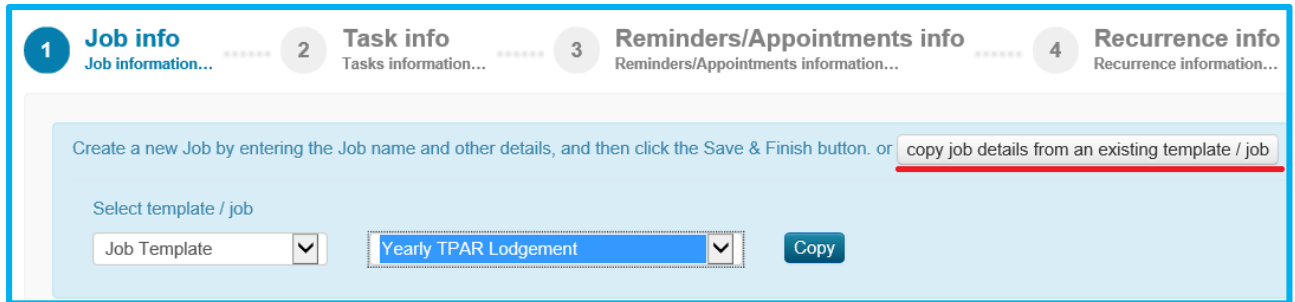
Adding a New Client you are required to enter the following information:

- 1 Client Information – Note by adding the ABN first, it is checked by ABN lookup and Confirmed

- 2 Contact Information
- 3 Checklist
- 4 Additional Details

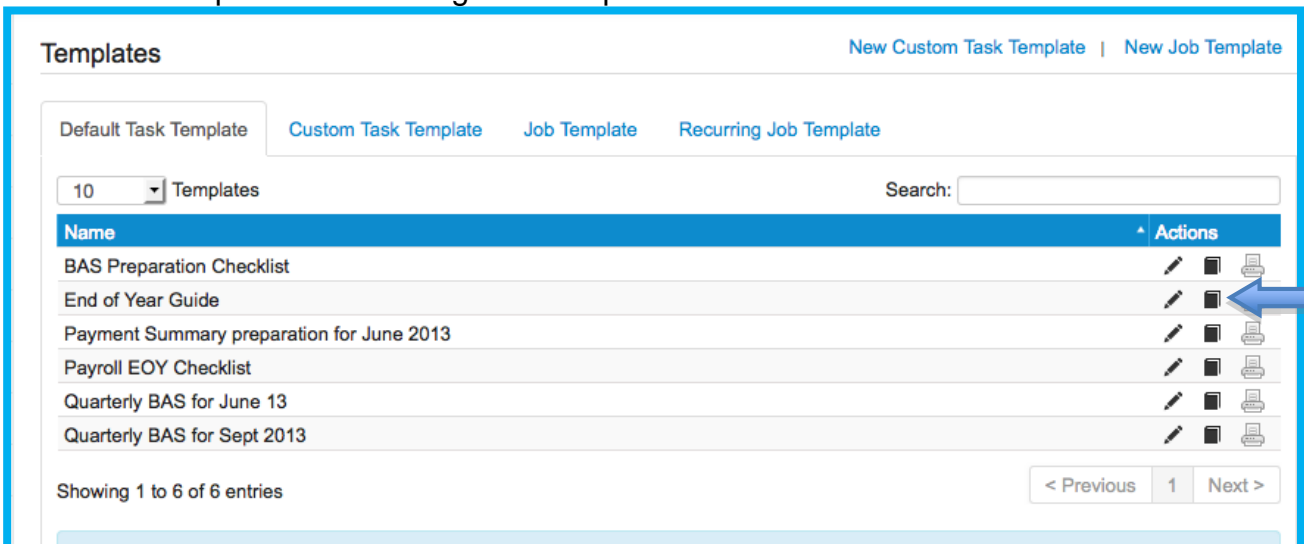
Step 3 – Adding Client to a Job

Using the Job Templates established early, add all lodgments appropriate to the client

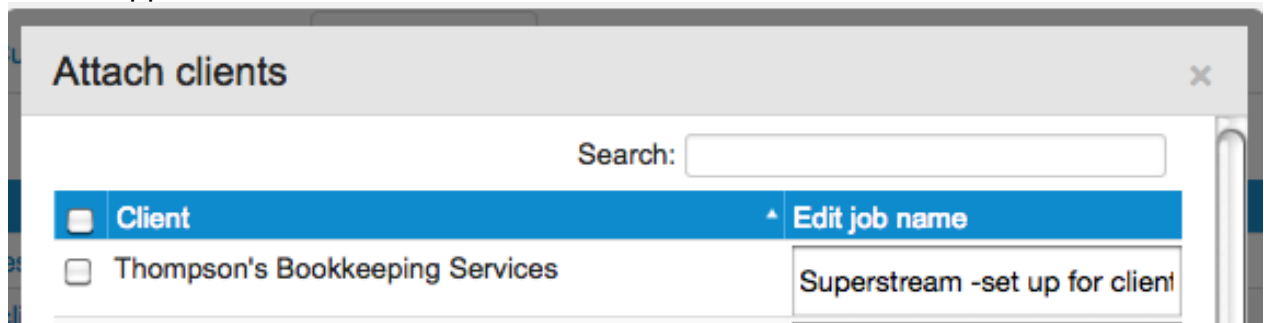


Step 3.1 – Adding Multiple Clients to Multiple Jobs

- 1 Using the Job Templates established early:-
- 2 Go to Job Template or Recurring Job Template.



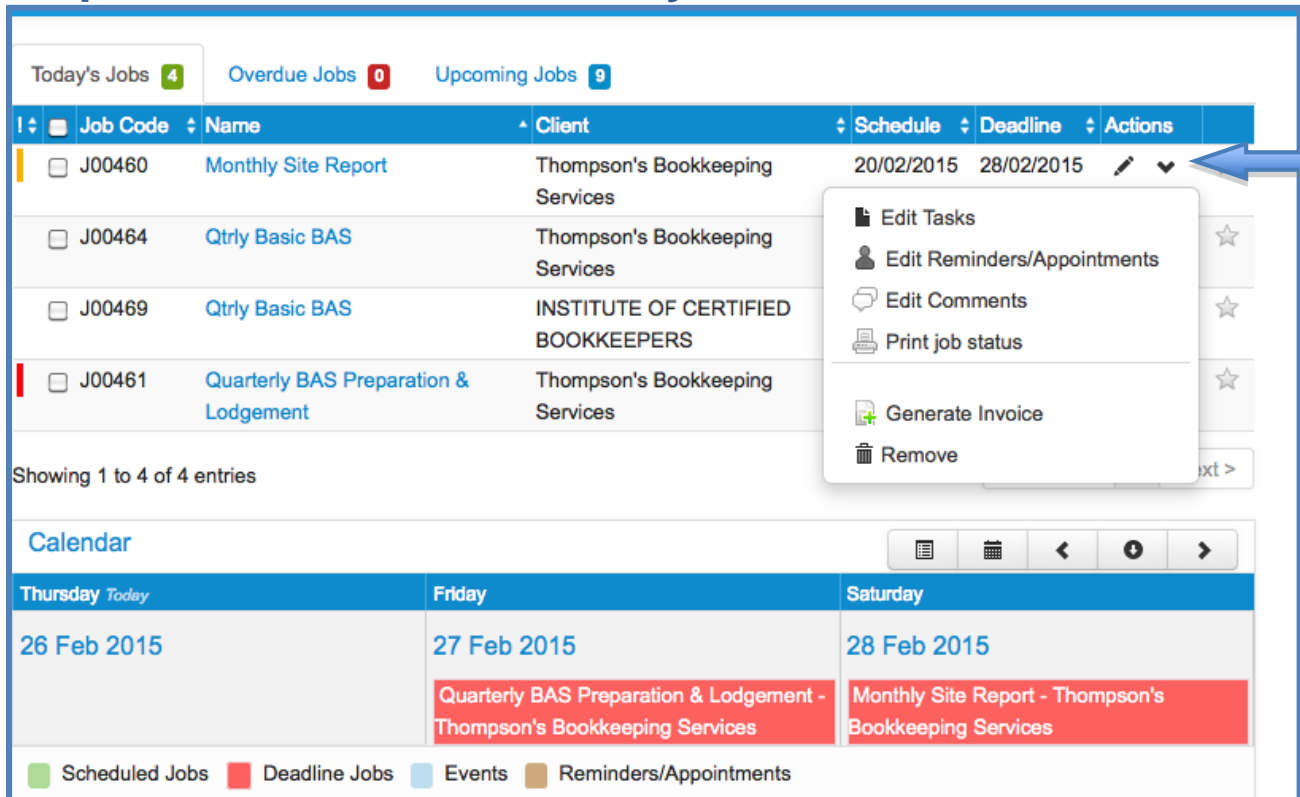
- 3 Select Job and on right hand side select attach to clients
- 4 Tick all applicable clients



- 5 This is saved and you are taken back to the Jobs screen and the job has been added to all clients selected.

Look in My Desk and you will also see all the jobs – depending on the date they will appear in either ‘Today’s jobs or Upcoming Jobs’

Step 4 – Add to Calendar – My Desk



Today's Jobs **4** Overdue Jobs **0** Upcoming Jobs **9**

Job Code	Name	Client	Schedule	Deadline	Actions
J00460	Monthly Site Report	Thompson's Bookkeeping Services	20/02/2015	28/02/2015	[Edit] [Dropdown]
J00464	Qtrly Basic BAS	Thompson's Bookkeeping Services			[Star]
J00469	Qtrly Basic BAS	INSTITUTE OF CERTIFIED BOOKKEEPERS			[Star]
J00461	Quarterly BAS Preparation & Lodgment	Thompson's Bookkeeping Services			[Star]

Showing 1 to 4 of 4 entries


Calendar

Thursday Today	Friday	Saturday
26 Feb 2015	27 Feb 2015	28 Feb 2015
	Quarterly BAS Preparation & Lodgment - Thompson's Bookkeeping Services	Monthly Site Report - Thompson's Bookkeeping Services

Scheduled Jobs
 Deadline Jobs
 Events
 Reminders/Appointments

After you have setup the job & the tasks, then as you actually make appointments to complete the work, create appointments/reminders in the CLM

Setup Reminder/Appointment

- At 'My Desk' select the job/client you need to edit by choosing  this gives you a selection of edit possibilities
- Choose 'reminders'
- Select 'New Reminders', add description, name, date & time.
- Add recurring details if required
- This then appears on your Calendar in the My Desk Dashboard

You are READY TO WORK - NOW

At this point you can use the CLM effectively. Refer to this each month and you will have a list to contact the clients for appointments and schedule your workload.

This doesn't include the tasks that are part of your appointment, but it does supply you with a jobs list for applicable clients quickly and easily. When you confirm the appointment, take that opportunity to update the Job, add a task/template and add the Reminders/Appointment into the calendar.