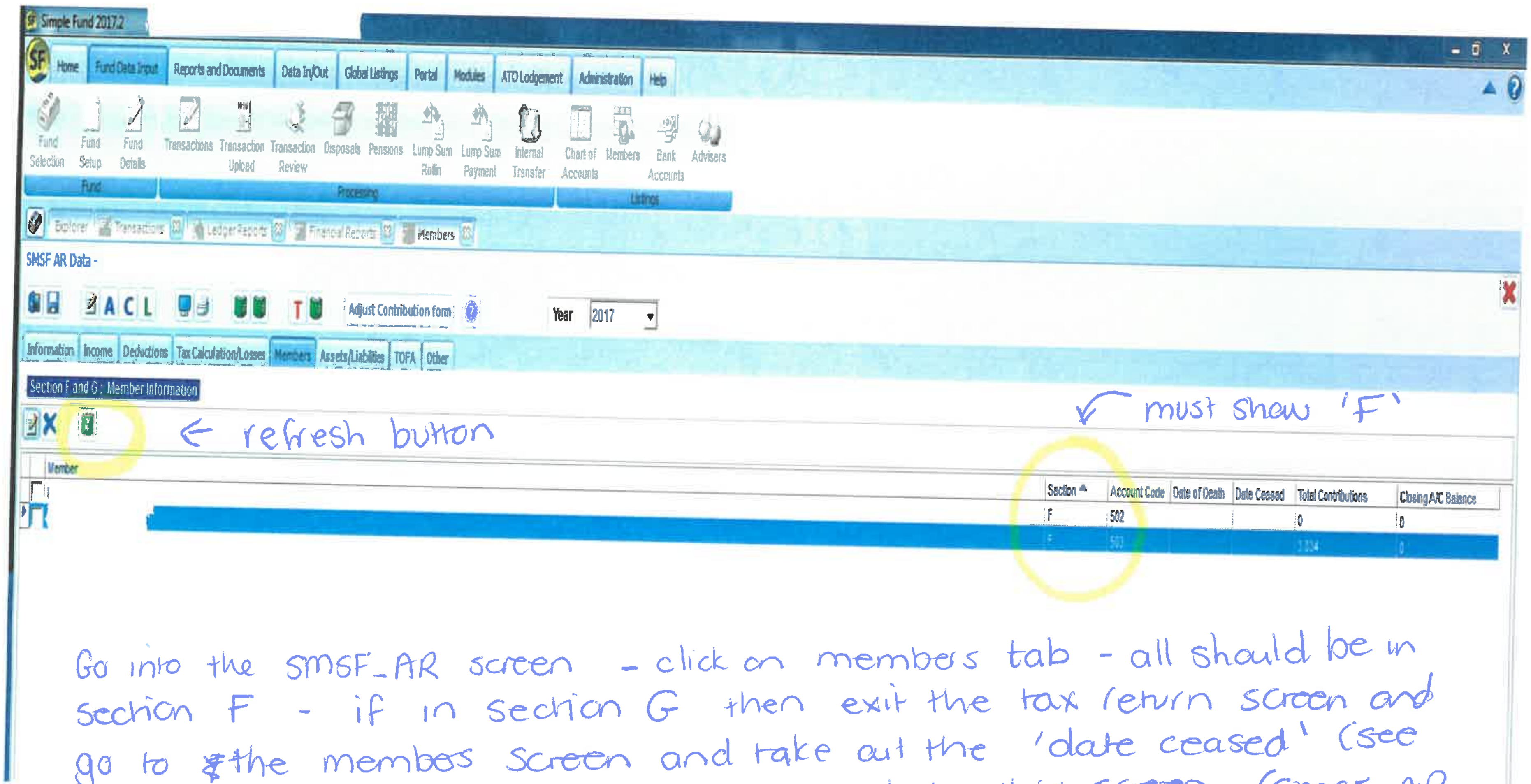
Member tab in Annual Return screen

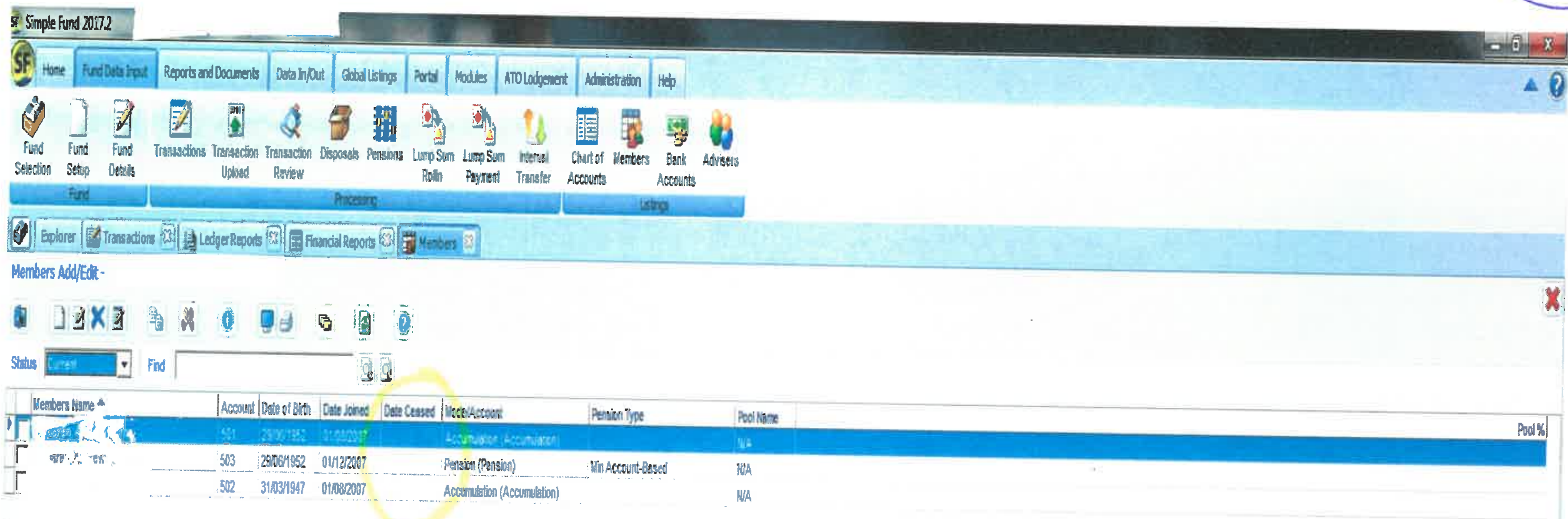
1



Go into the SMSF_AR screen - click on members tab - all should be in Section F - if in Section G then exit the tax return screen and go to ~~#~~ the members screen and take out the 'date ceased' (see next screen dump) - then come back to this screen (SMSF_AR in Financial Reports screen - member tab) - CLICK ON THE GREEN REFRESH ICON (highlighted above) - the 'Section' column should now display 'F'. Save the Return and go to the 'Returns' tab to download the tax return to pdf. (see last screen dump).

Members screen

2

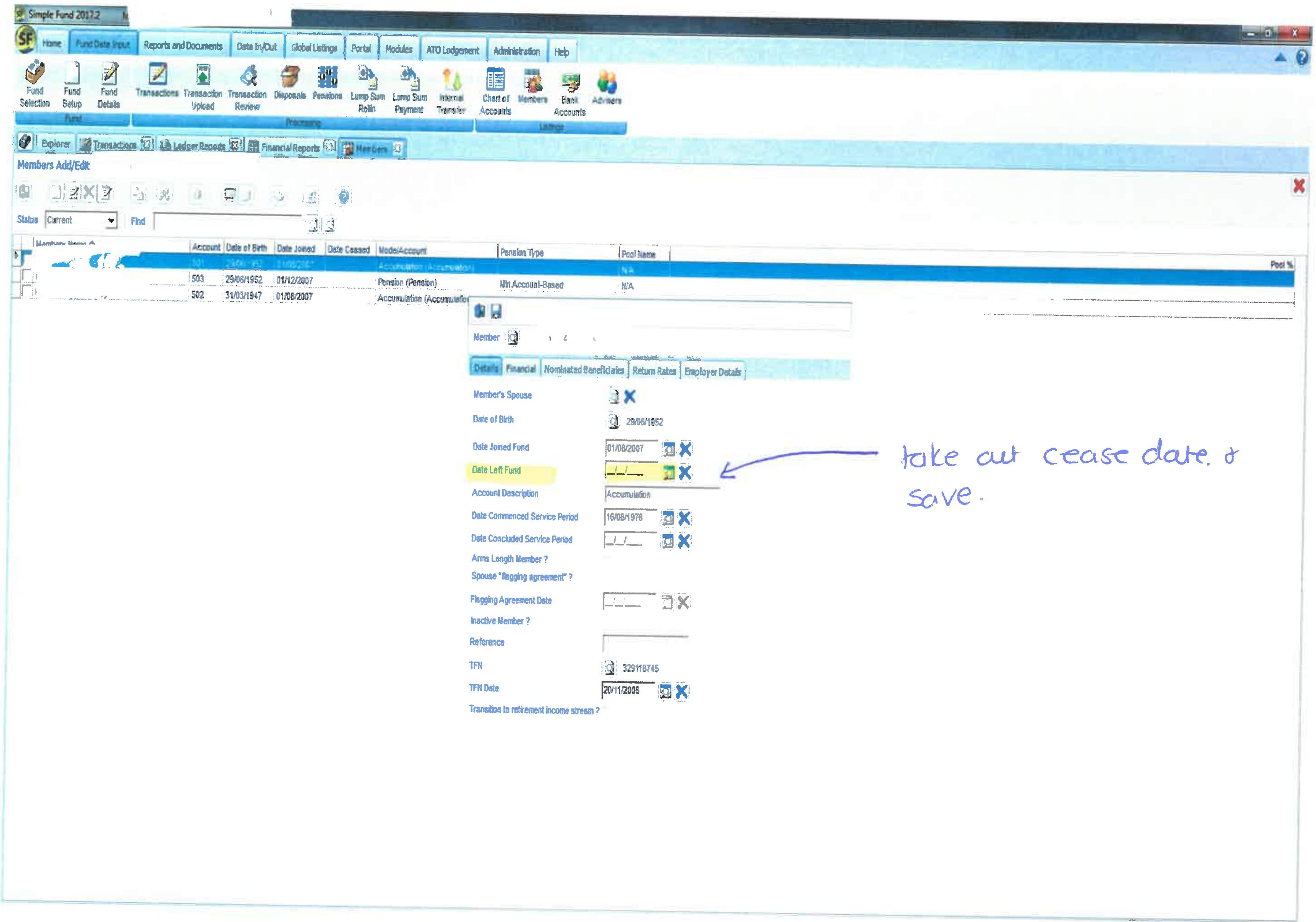


↑ take out any cease dates by double clicking 'date left fund' on member and delete (see next screen dump) - click save.

- Return to Financial Reports screen + click SMSF - AR button - member tab - refresh button to display section 'F'.

members screen

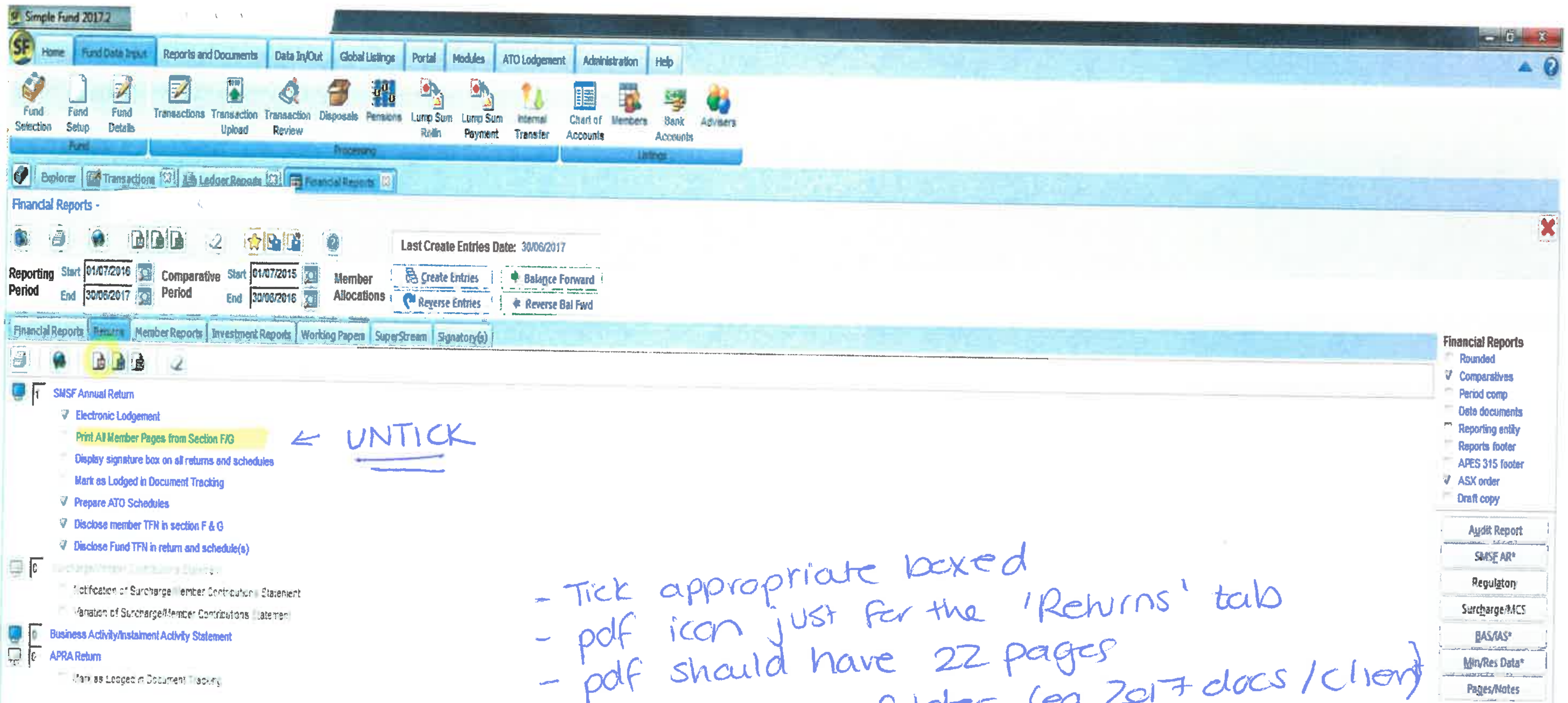
3



take out cease date & save.

Financial Reports - Returns Tab

4.



← UNTICK

- Tick appropriate boxed
- pdf icon just for the 'Returns' tab
- pdf should have 22 pages
- save as → folder (eg 2017 docs / client)
- change name to include 'LodgeIT'
  eg fs 20170630 - LodgeIT

- import into Lodge IT.
  by opening client's smsfAR report and
  click on ⚙ ▼ icon → ▼ import - click on
  import - and select • BGL - select saved
  BGL folder