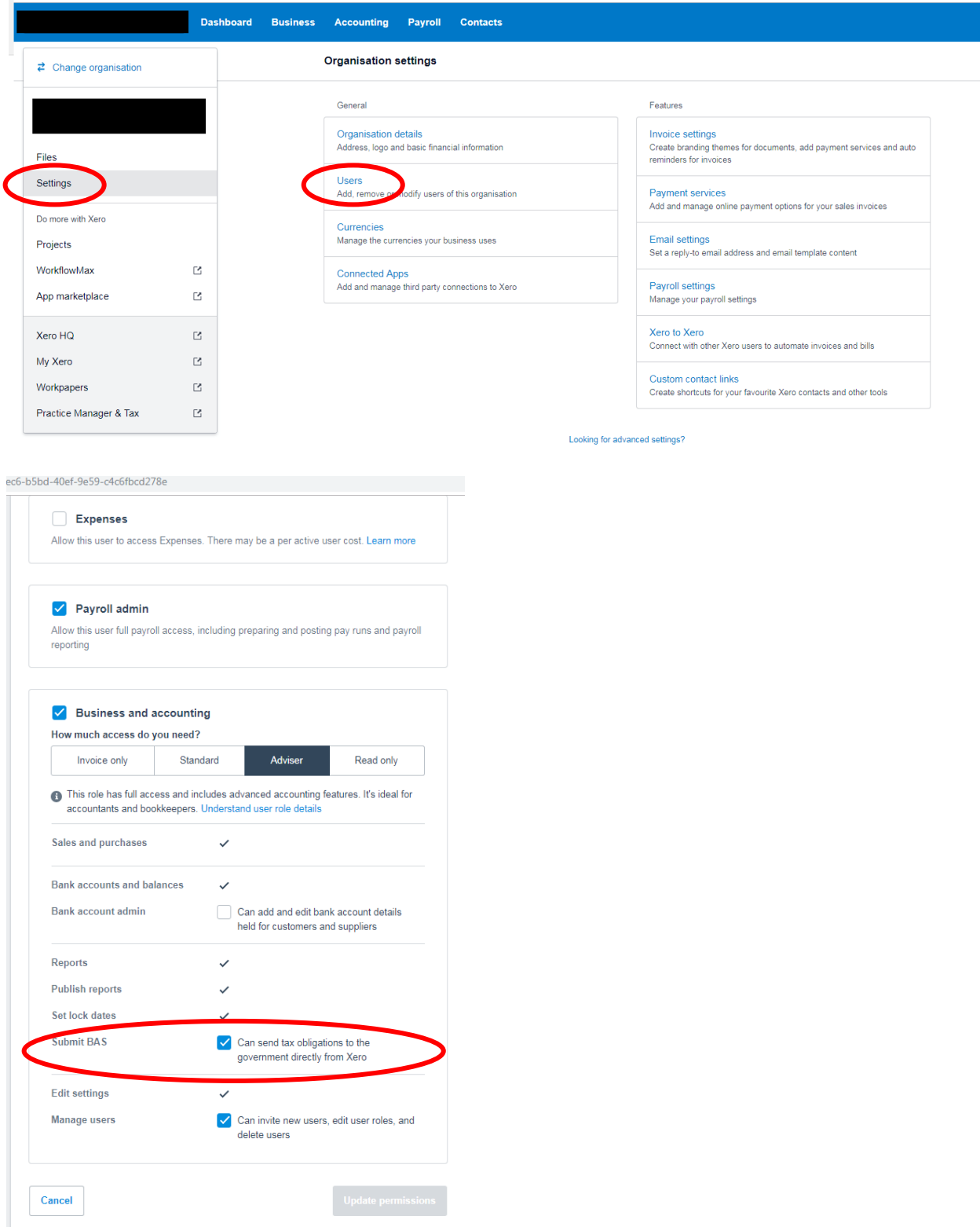


## How to Lodge BAS through Xero

For the first instance, the ATO need to be notified of the SSID and link it to the client.

To begin, update the users who will need permission to lodge the BAS through Xero. This may be client or compiler. Go to Settings > Users > Sally Campbell > Tick 'Submit BAS'



The screenshot shows the Xero Organisation settings interface. On the left sidebar, the 'Settings' menu item is highlighted. In the main content area, the 'Users' section is selected, showing a list of users. Below this, the 'Business and accounting' permissions are configured. The 'Submit BAS' permission is checked, indicating that the user can send tax obligations to the government directly from Xero.

**Organisation settings**

**General**

- Organisation details**  
Address, logo and basic financial information
- Users**  
Add, remove or modify users of this organisation
- Currencies**  
Manage the currencies your business uses
- Connected Apps**  
Add and manage third party connections to Xero

**Features**

- Invoice settings**  
Create branding themes for documents, add payment services and auto reminders for invoices
- Payment services**  
Add and manage online payment options for your sales invoices
- Email settings**  
Set a reply-to email address and email template content
- Payroll settings**  
Manage your payroll settings
- Xero to Xero**  
Connect with other Xero users to automate invoices and bills
- Custom contact links**  
Create shortcuts for your favourite Xero contacts and other tools

[Looking for advanced settings?](#)

**ec6-b5bd-40ef-9e59-c4c6bcd278e**

☐ **Expenses**  
Allow this user to access Expenses. There may be a per active user cost. [Learn more](#)

☒ **Payroll admin**  
Allow this user full payroll access, including preparing and posting pay runs and payroll reporting

☒ **Business and accounting**  
How much access do you need?  
Invoice only | Standard | **Adviser** | Read only

**Submit BAS** ☒ Can send tax obligations to the government directly from Xero

**Manage users** ☒ Can invite new users, edit user roles, and delete users

[Cancel](#) [Update permissions](#)

Once the correct Users have permission to lodge, you will need to make sure they are using the Simpler BAS – unfortunately cannot use the 'Full BAS' to lodge.

To do this, go to Advanced Settings > Financial Settings > Go to Simpler BAS

## Advanced accounting

Advanced features	Advanced settings
<ul style="list-style-type: none"><li>★ Find and recode Fix incorrect categorisation across multiple transactions at once</li><li>★ Manual journals Work directly with the general ledger</li><li>★ Fixed assets Create and manage assets</li><li>☆ Assurance dashboard Monitor the accuracy of financial data within your organisation</li><li>☆ Export accounting data Export data from Xero for importing into other systems</li><li>☆ History and notes View a summary of the actions made by all users to your transactions</li></ul>	<ul style="list-style-type: none"><li>★ Financial settings Edit financial settings like tax periods and lock dates</li><li>★ Chart of accounts Add, edit, archive, delete, import or export your accounts</li><li>☆ Tax rates Add, edit or delete tax rates</li><li>☆ Fixed assets settings Manage asset types and account defaults</li><li>☆ Tracking categories Manage tracking items for more powerful reporting</li><li>☆ Report codes Map the chart of accounts to practice-wide report codes</li><li>☆ Report fields and schedules Enter details into fields set by your practice</li><li>☆ Conversion balances Update account balances from previous accounting systems</li></ul>

[Looking for organisation settings?](#)

There's a new activity statement that supports the ATO's Simpler BAS reporting. Most businesses earning less than \$10 million will be eligible for Simpler BAS. You can change to Simpler BAS and manage your Simpler BAS settings from the new activity statement.

[Go to Simpler BAS](#)

### Financial Year End

30 June [Change](#)

**BSY Accounting Method** **Tax File Number** **BSY Calculation** **PAYE Withheld Period** **PAYE Income Tax Method**

Cash Basis 899682190 Quarterly (Option1) Monthly None

Additional tax areas applicable to your business

☐ Fringe Benefits Tax ☐ Fuel Tax Credits ☐ Wine Equalisation Tax

#### Tax Defaults

For Sales  
Tax exclusive Includes invoices, quotes, credit notes and receive money items

For Purchases  
Tax inclusive Includes bills, purchase orders, credit notes, and spend money items

#### Lock Dates

Lock dates stop data from being changed for a specific period. You can change these at any time.

Stop all users (except advisers) making changes on and before  
30 Jun 2014

Stop all users making changes on and before

#### Time zone

(UTC+10:00) Canberra, Melbourne, Sydney

[Save](#) [Cancel](#)



To link the SSID to the client, click 'Continue' and then call the ATO – takes under 5 minutes. You will need to provide client ABN, Doc ID and SSID. Client can do this through Business Portal but not available through Tax Agent Portal. You will be able to immediately click 'Check Connection'. An error will come up if the client ABN branch number is not entered in Organisation Settings.

Dashboard
Business
Accounting
Payroll
Contacts

Reporting
Activity Statement

### Lodge activity statements with Xero

**What's new?**  
You can now lodge activity statements with Xero. The process is simple, secure and requires a minimal amount of setup.

**Connected before?**  
If you have already called and successfully connected to the ATO before as this agency you can skip straight to connecting

[Check connection and get activity statements](#)

Connecting to the ATO can take up to a minute.

[No thanks, I prefer to lodge manually](#) [Learn more](#) [Continue](#)

### Connect Xero to the ATO

To lodge activity statements from Xero you need to authorise Xero with the ATO.

**Step 1:** Call the ATO on 1300 852 232 to authorise Xero software

Alternatively, visit [tap.ato.gov.au](http://tap.ato.gov.au) to update your details. An AusKey is required to authenticate.

**Step 2:** Provide proof of ownership (e.g. TFN, address)

During this call you will need to provide proof of ownership and information to establish the connection to authorise Xero. [Learn more about preparing for the ATO proof of identity check](#)

You may need to supply the following details:

Registered agent ABN <b>68 191 400 792</b>	Registered agent contact name <b>Joel Thomas</b>
Registered agent number <b>48694017</b>	Software ID (SSID) <b>8235515885</b>
<b>[REDACTED]</b> number <b>71 136 662 032</b>	Software Provider <b>Xero Australia Pty Ltd.</b>
	<b>89 124 215 247</b>

**Step 3:** Check your connection is authorised with the ATO

[Check connection and get activity statements](#)

Connecting to the ATO can take up to a minute.

I don't want to lodge activity statements with Xero, [back to manual activity statements](#)



Xero will now have a list of BASs that need actioning and those that have been completed.

Work through the BAS as usual, reviewing the reports, and then you can Lodge using the button at the bottom of the form.

[Reporting](#) > [Activity Statement](#)
[Activity Statement Settings](#)

**Needs Attention**

Oct-Dec 2018

Due in 44 days | Due 28 Feb 2019

Review

**Completed**

No activity statements lodged

Due in 44 days | 28 Feb 2019 • Document ID: [REDACTED] Type: A

[REDACTED] GST accounting method: Cash

14,349

Amount payable

**Goods and services tax** Oct-Dec 2018
 

<b>G1</b> Total sales	GST inclusive	97,622
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**PAYG income tax instalment (Option 1)** Oct-Dec 2018
 

<b>T7</b> Instalment	7,000
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If varying this amount, complete T8, T9 and T4

<b>T8</b> Estimated tax for the year	
<b>T9</b> Varied amount for the quarter	
<b>T4</b> Reason code for variation	

**Amounts you owe the Tax Office**

<b>1A</b> GST on sales	8,874
<b>5A</b> PAYG income tax instalment	7,000
<b>8A</b> Total owed to the ATO	15,874

**Amounts the Tax Office owes you**

<b>1B</b> GST on purchases	1,525
<b>5B</b> Credit from PAYG income tax instalment variation	
<b>8B</b> Total owed by the ATO	1,525

**Payment**

<b>9</b> Your payment amount	14,349
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Export

Save as draft

Lodge to ATO