

BAS Readiness Board: Build Prompt

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About this document

This document contains a single prompt you can give to Claude to build a **BAS Readiness Board** for your practice. It's one interactive page that shows every connected client and answers one question: is the accounting file ready for BAS preparation, and if not, what's outstanding?

The board reads your XBert data through the XBert MCP Gateway: unreconciled lines, GST coding, missing source documents, items in the wrong place and other open alerts, plus net GST and the GST account for each client. It uses read-only tools only, so it never changes anything in XBert.

What you need

- A Claude plan with access to Artifacts that can use connectors (the "mcp" capability).
- The **XBert connector** added in Claude (Settings, Connectors), signed in to your XBert practice.
- Clients connected to their accounting file in XBert, with a GST basis set.

How to use it

1. Start a new conversation in Claude.
2. Copy everything inside the **Master prompt** section below and paste it in.
3. Claude will ask which XBert portal to use, show you a quick summary for the latest period, then build the board.
4. Check the summary against what you already know about your clients before relying on the board.

Before you rely on it

This board supports your professional judgement; it doesn't replace it. It's a snapshot pulled from XBert, not live. Figures depend on XBert having synced each ledger and on each client's XBert setup, and net GST is calculated from the ledger, not the lodged BAS. Treat any flag as a prompt to investigate, not a conclusion.

Master prompt

Copy from the line below to the end of the prompt.

Build me a BAS Readiness Board for my practice using the XBert MCP Gateway.
Use read-only tools only. Do not change, complete or create anything in XBert.
Before pulling any data, list the XBert portals I can access and ask me which one to use. Don't pick one yourself.

WHAT I WANT

One interactive HTML page showing every connected client, answering: is the accounting file ready for BAS preparation, and if not, what is outstanding?

Controls at the top:

- Cadence: Monthly or Quarterly
- Period ending: the last 6 month-ends (monthly) or BAS quarter-ends (quarterly)

Table sorted by client name by default. Clicking a column heading sorts by it; clicking again reverses.

COLUMNS (one row per client)

Client | Bookkeeper | Status | Unreconciled | GST coding | Missing source docs | Wrong place | Other alerts | Net GST | GST account | Completed, unresolved

DATA AND RULES

1. Clients: include only clients connected to their accounting file in XBert.
Leave out any file with no GST basis set, and list those under the table.
2. Bookkeeper: the person assigned to the "Bookkeeper" role for each client in the Connect portal role assignments. Show "Unassigned" if blank.
3. Alerts in the period: an outstanding XBert alert counts if its transaction date is on or before the selected period end. Exclude anything dated after.
Balance checks stamped with the date XBert ran them (e.g. fixed asset reconciliation) have no real transaction date: count them in every period.
Exclude Bill Agent (receipt capture) items, which are processing steps, not checks.
4. Map alerts to columns:
 - Unreconciled: the monthly "unreconciled transactions" alert. Show the number of lines it reports, not the alert count.
 - GST coding: alerts with risk type Tax Risk, excluding the "Bills over \$75 have no attachments" alert.
 - Missing source docs: the "Bills over \$75 have no attachments" alert.
 - Wrong place: alerts with risk type Bookkeeping Risk or Unusual Risk, excluding unreconciled. This includes the suspense/uncoded aged balance check.
 - Other alerts: every other outstanding XBert (Overdue, Payroll, Duplicate, Fraud, Other).
5. Status:
 - Not ready: any High or Medium risk item, or any unreconciled alert.
 - Minor flag: only Low or Information items.
 - Ready: nothing outstanding.Colour-code the status.
6. Net GST: 1A less 1B for the BAS quarter, from XBert's Activity Statement data, using the file's own GST basis (cash or accruals). In monthly view, show the whole quarter's figure and label it as such. Under the figure, note "Cash" or "Accruals".
7. GST account: the balance of the GST account in the trial balance at period end (year-to-date). Positive is payable; show refundable in brackets.
8. Completed, unresolved: alerts marked Completed or Completed - No Action where XBert still reports the underlying issue as not fixed, with a transaction date inside the period. Show for review only; they don't change the status. If the Gateway can't return this, show "Not available" and say why in the notes.

BEFORE BUILDING

- Pull data for the most recent period first and show me a quick summary (client count, how many Ready / Minor flag / Not ready) so I can sanity-check.

- Cross-check each client's counts against XBert's outstanding summary for that client (risk level, risk type, process). Tell me about any mismatch.
- If a client has hundreds of alerts or a call fails, carry on with the rest and list the gaps.

ON THE PAGE

Below the table, include three short sections:

"How this is calculated", "Where each check comes from" and

"Limits of this snapshot". The limits section must state that this is a snapshot pulled from XBert, not live, and that figures depend on XBert having synced and on each client's XBert setup.

Keep the design clean and printable. Use Australian spelling.