

Creating and Importing Sections in Checklists

14 Steps [View most recent version on Tango.us](#) 

Created by

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Creation Date

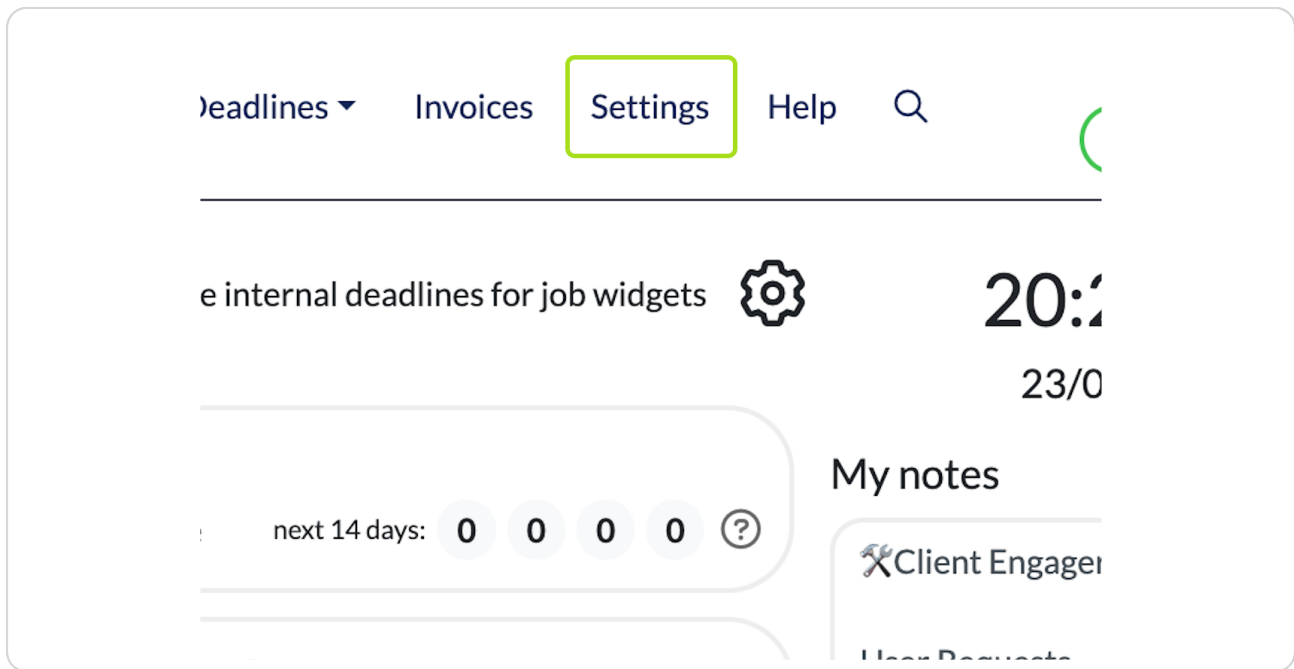
May 23, 2023

Last Updated

May 23, 2023

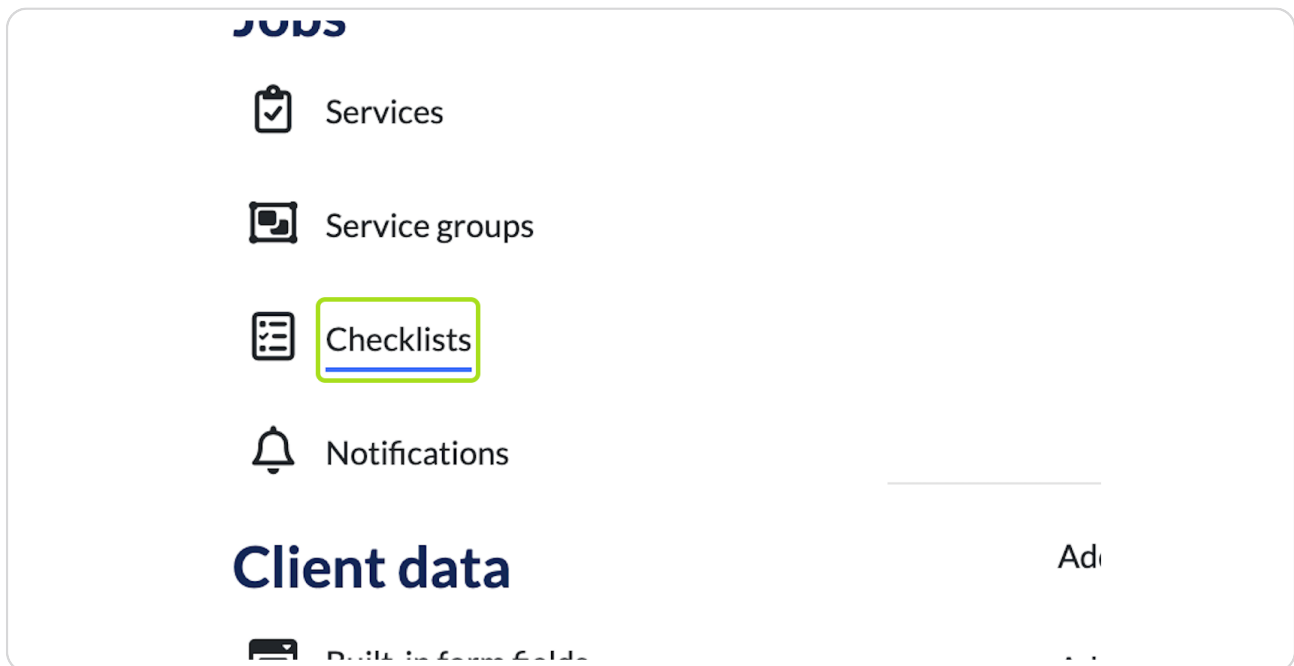
STEP 1

Click on Settings



STEP 2

Click on Checklists



STEP 3

Find the service you want to add or edit the checklist for and click add or edit

1 version
created: 18/10/2021, 17:31:29

edit

(no checklist defined)

+ create

2 versions
created: 22/08/2022, 16:53:01

edit

STEP 4

to name the checklist click set version name

Self-employed Accounts Latest: (name not specified)

Version 1

<

set version name

>

created: 23/05/2023, 20:24:33

no sections defined

+ add section



import sections

delete all sections

STEP 5

Click on add section

Version 1


 set version name


created: 23/05/2023, 20:24

no sections defined

+ add section

↓ import sections



 Save new version from points above



STEP 6

Type name of section


we advise naming each section in coordination with each phase of the service

Edit checklist


Ve

 set

created: 23/

 Section name:

Test



Name

no points de

+ add point

↓ import point

+ add section

↓ import

STEP 7

Click on add point

The screenshot shows a form titled 'Test' with a red trash icon. Below the title, there is a message 'no points defined in this section'. The '+ add point' button is highlighted with a green border. Other buttons include 'import points to this section', '+ add section', and 'import sections'. At the bottom, there is a green button labeled 'Save new version from points above'.

STEP 8

Type the name of the point

The screenshot shows the 'Edit checklist' interface for 'Version 1'. The 'Section name' is 'Test'. Below the section name, there is a table with columns 'Name', 'YES status allowed', and 'NO status'. The first row has 'Test' in the 'Name' column, a red trash icon, and a checked checkbox in the 'YES status allowed' column. The '+ add point' button is highlighted with a green border. Other buttons include 'import points to this section', 'delete all points', '+ add section', 'import sections', 'delete all sections', 'Save new version from points above', and 'Close'.

STEP 9

You can import sections from other check lists, click on **import sections**

YES status allowed

+ add point ↓ import points to this section delete all points

+ add section ↓ import sections delete all sections

Save new version from points above × Close

Latest: (name not specified) - c

STEP 10

Select check list you want to import from

Import from another checklist

Source: Self-employed Accounts

Origin: generic specific client

Version: Version 2 - name: (not specified)

select all deselect all

Include? Including any savings accounts
to be reconciled?

Storers?
off?

editors?
ation in Gross Profit?

STEP 11

Click on sections to add

Import sections from another checklist

Service: Self-employed Accounts

Checklist origin: generic specific client

Checklist version: Version 2 - name: (not specified)

[select all](#) [deselect all](#)

- ☒ **BANK**
 - ☐ Are all bank accounts reconciled? Including any savings accounts
 - ☐ Any credit card statements to be reconciled?
- ☐ **SALES**
 - ☐ Have you reconciled the debtors?
 - ☐ Any bad debts to be written off?
- ☐ **PURCHASES**
 - ☐ Have you reconciled the creditors?
 - ☐ Is there any significant variation in Gross Profit?
- ☐ **TAX SAVINGS**
 - ☐ Should consideration be given to creating a partnership for tax savings?
 - ☐ Is there an opportunity to pay into a pension?

[Import selected](#) [Cancel](#)

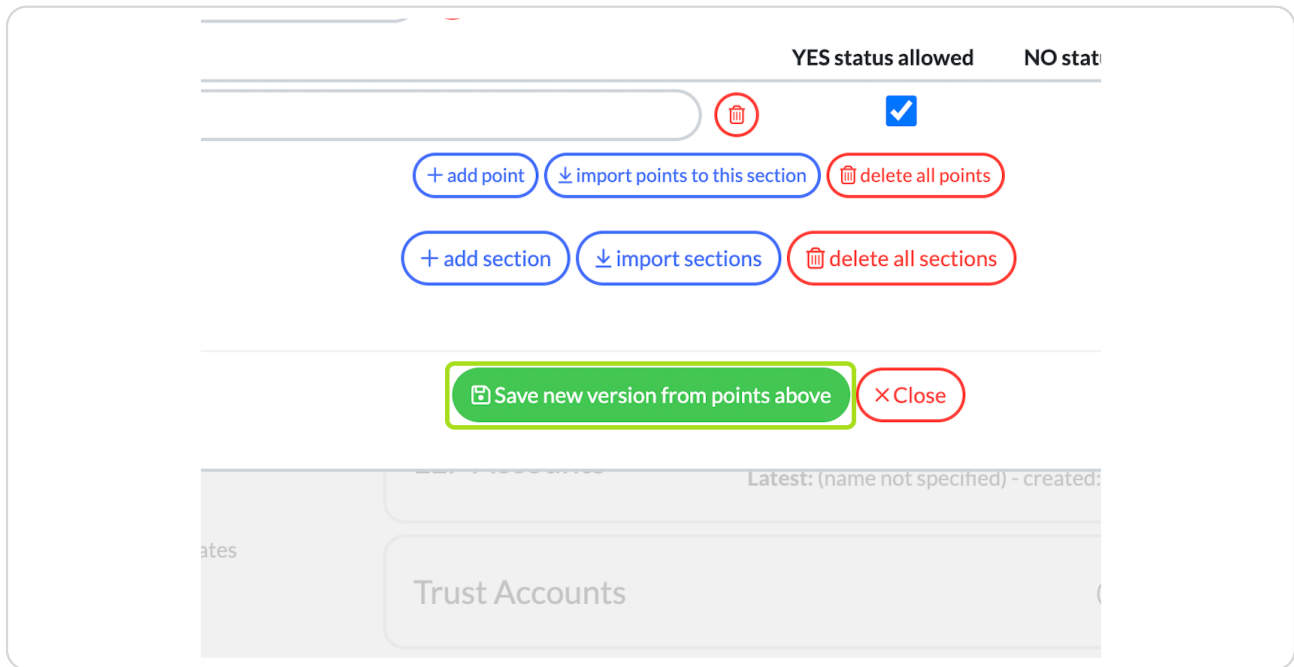
STEP 12

Click on Import selected

[Import selected](#) [Cancel](#)

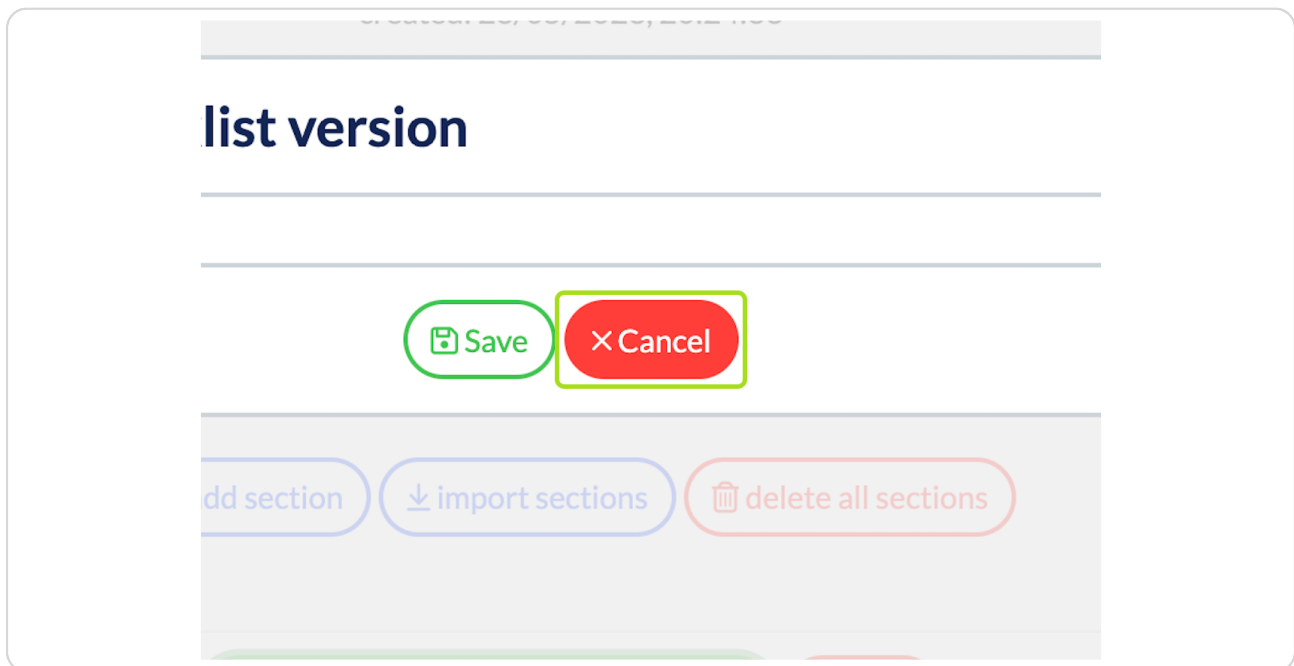
STEP 13

Click on **Save new version from points above**



STEP 14

Click on **Save**



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