

Creating and Importing Sections in Checklists

14 Steps

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Created by

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Creation Date

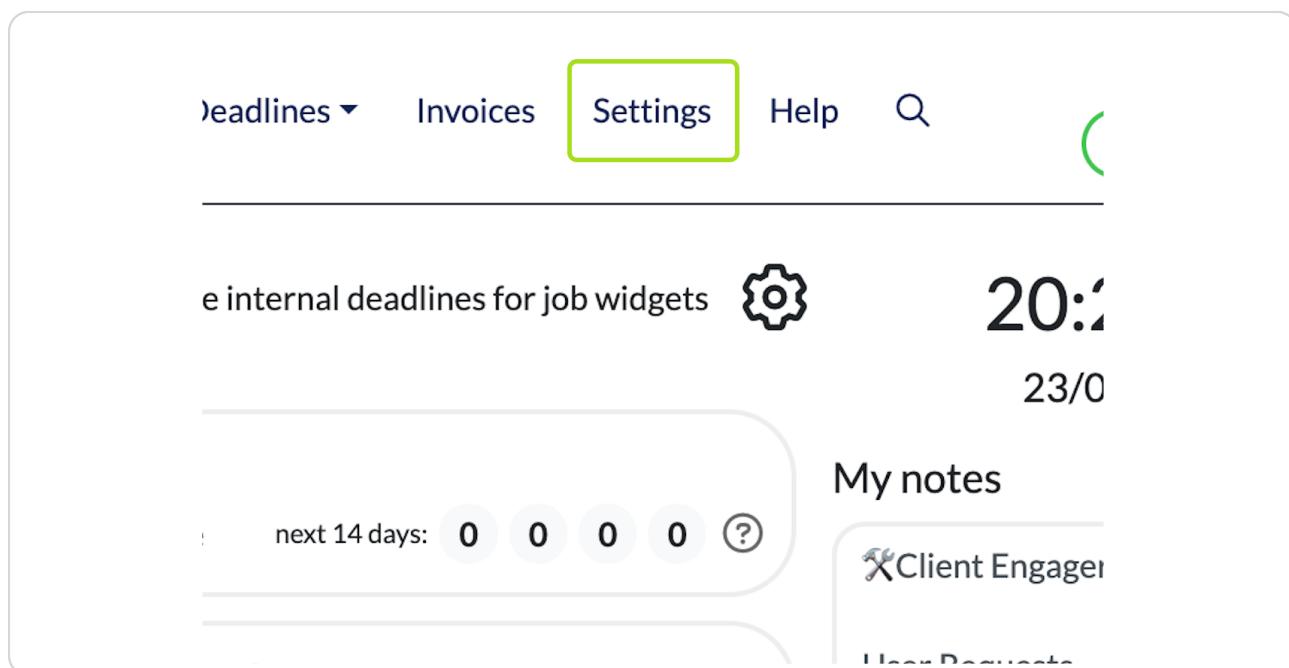
May 23, 2023

Last Updated

May 23, 2023

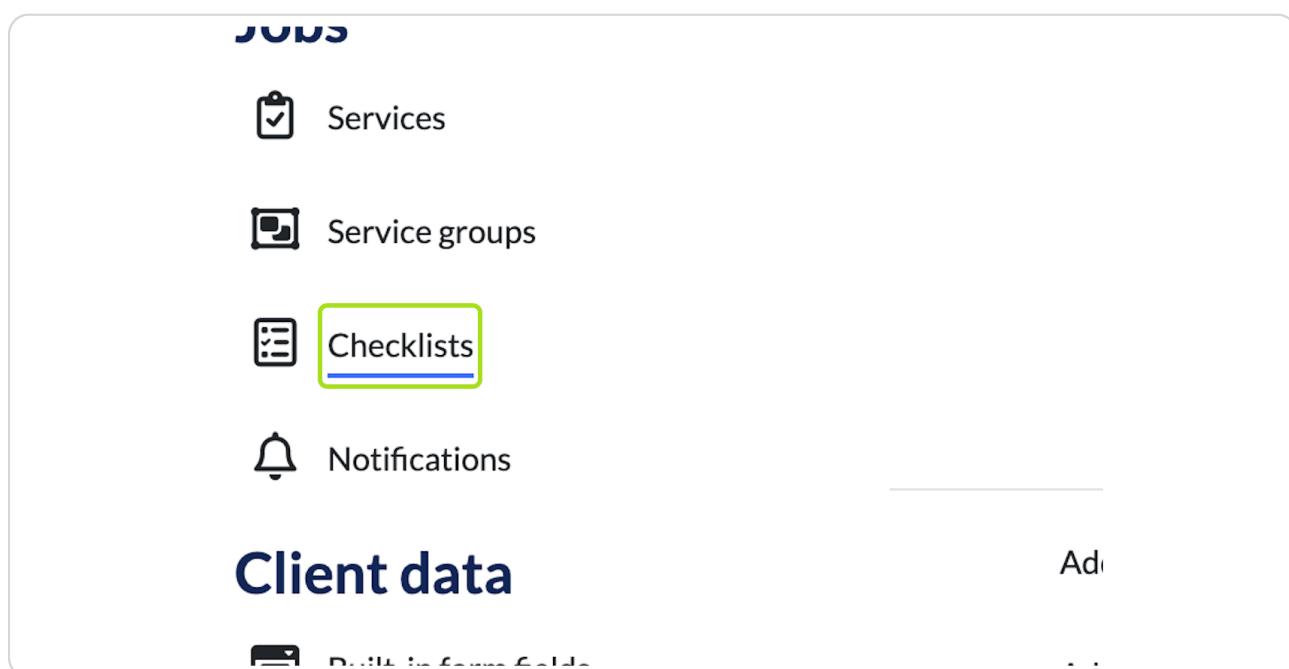
STEP 1

Click on Settings



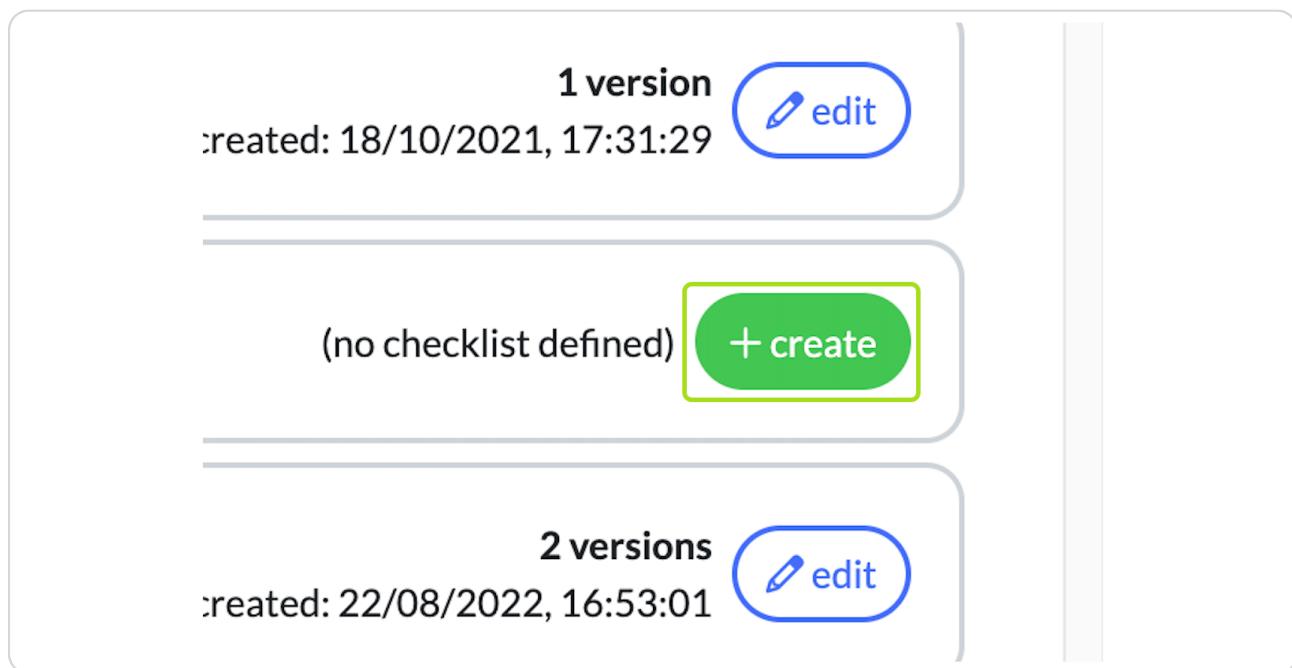
STEP 2

Click on Checklists



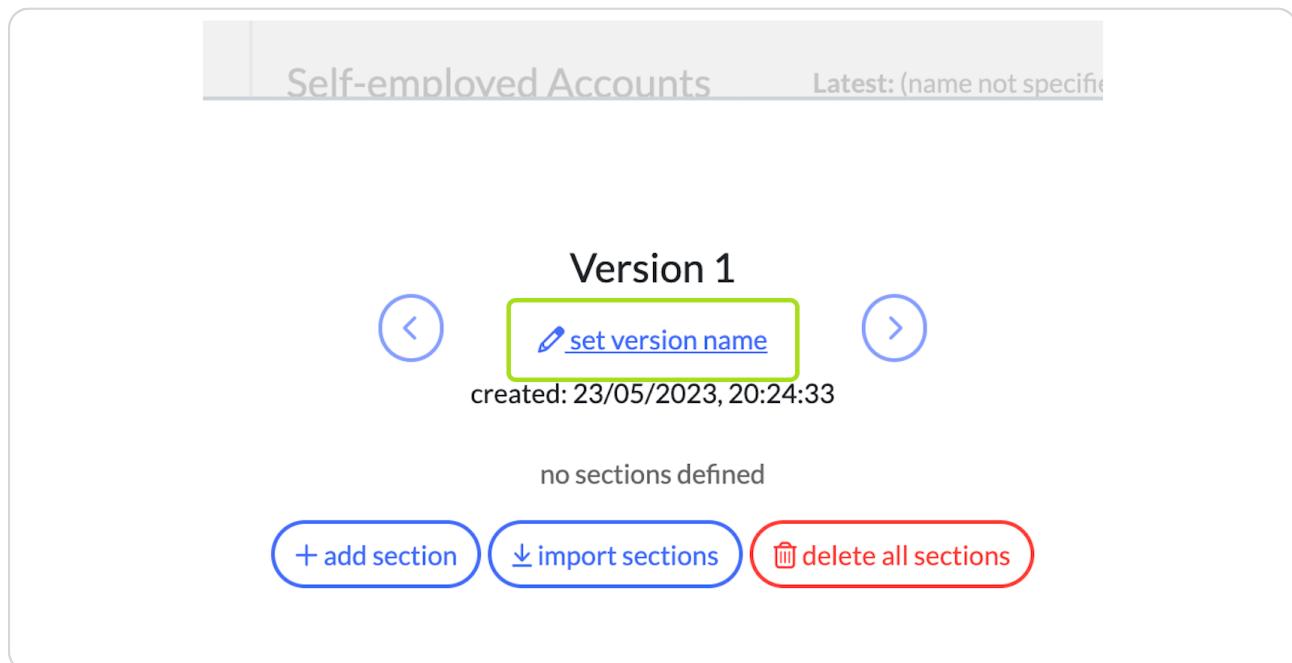
STEP 3

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



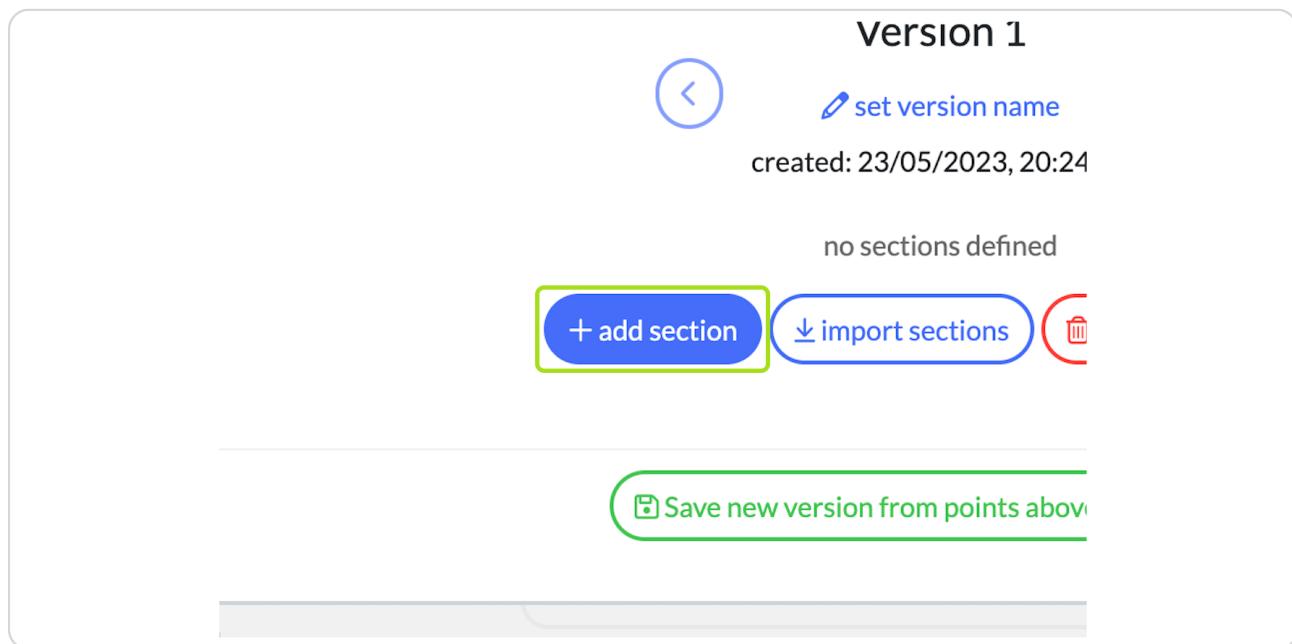
STEP 4

to name the checklist click set version name



STEP 5

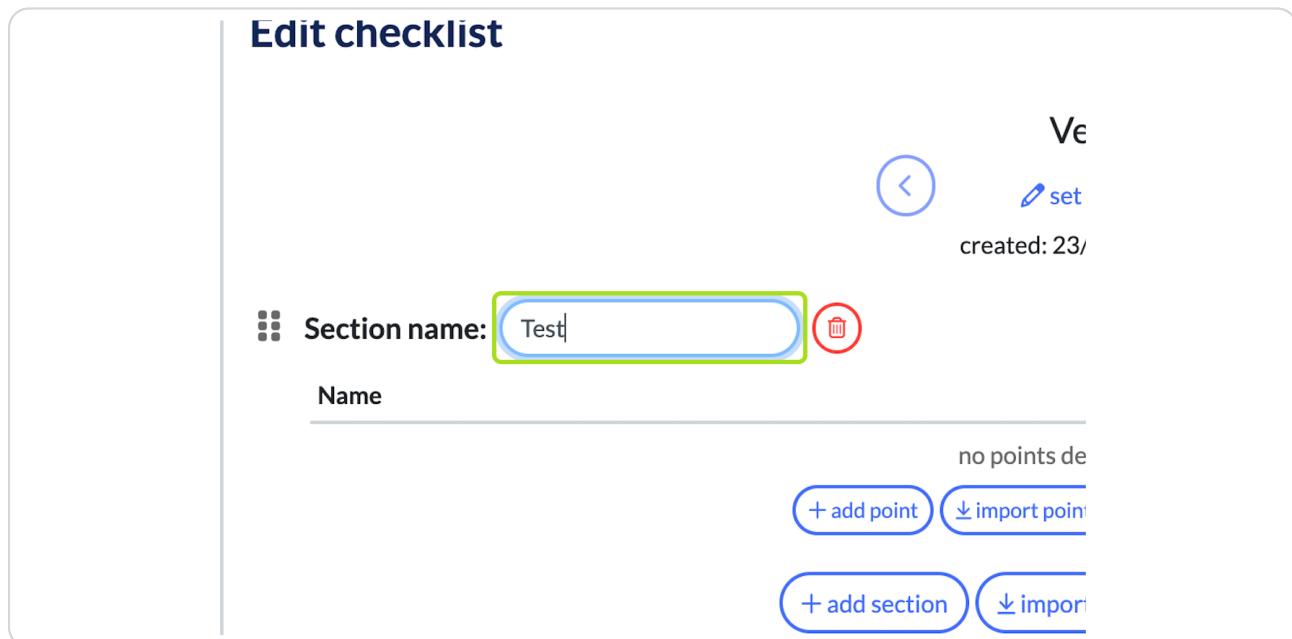
Click on **add section**



STEP 6

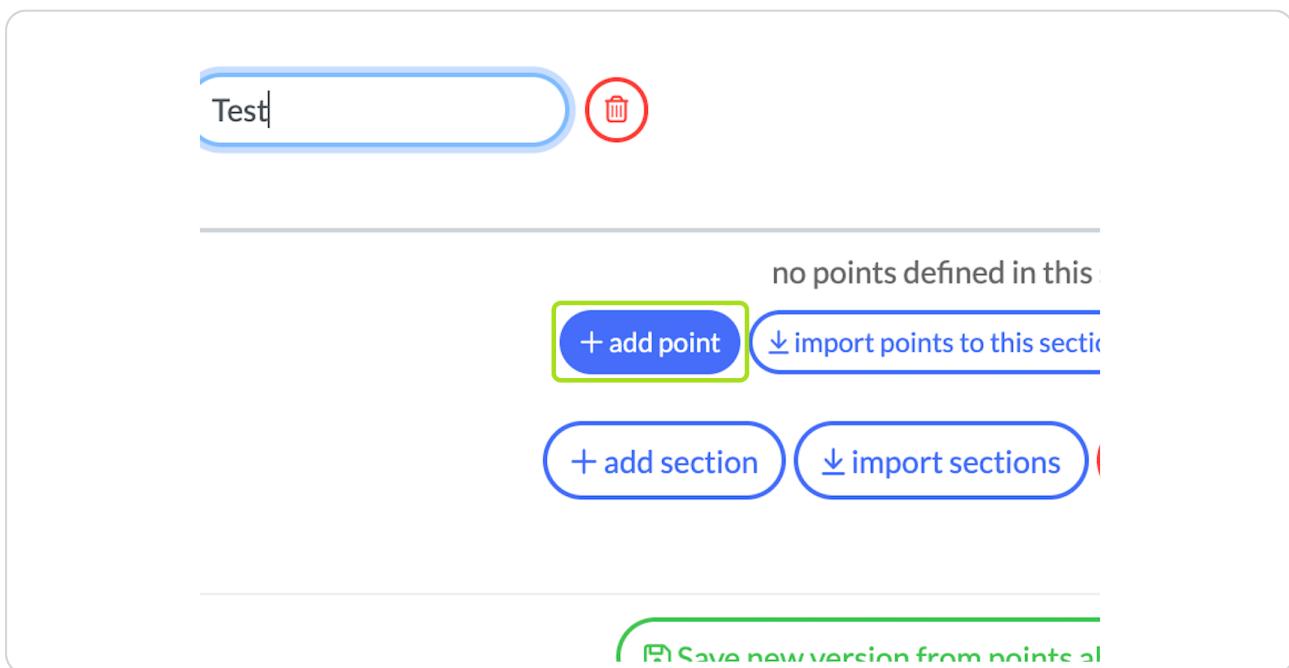
Type name of section

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



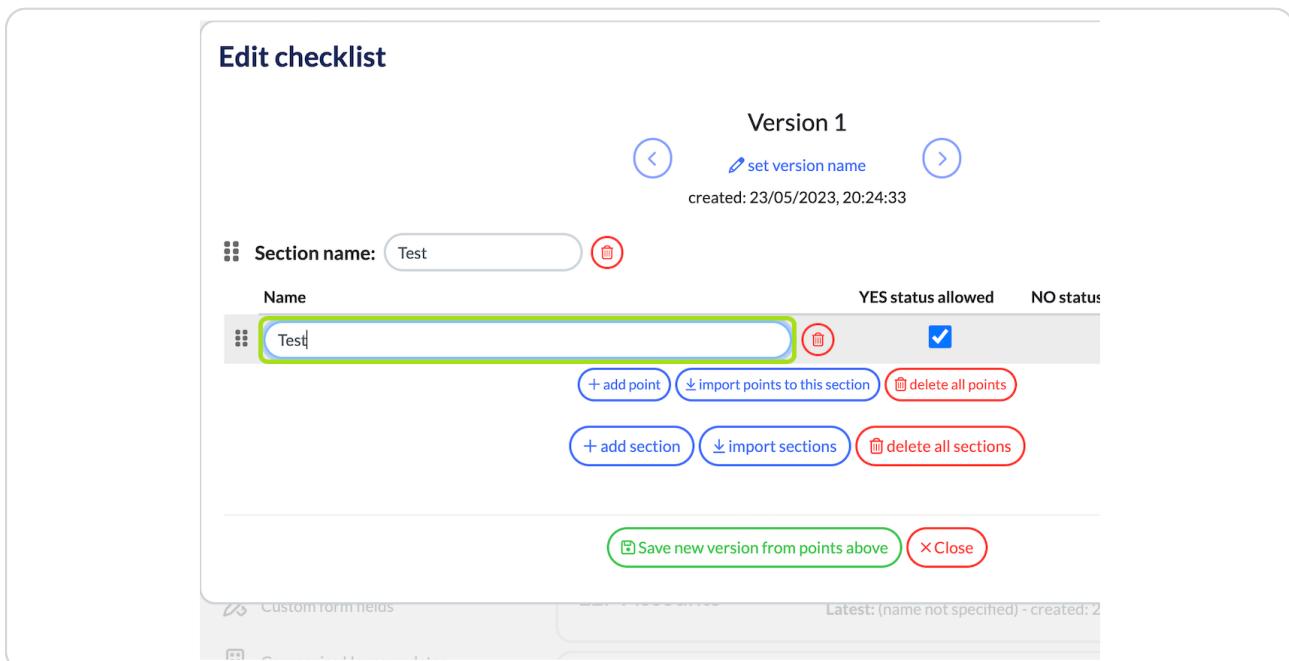
STEP 7

Click on add point



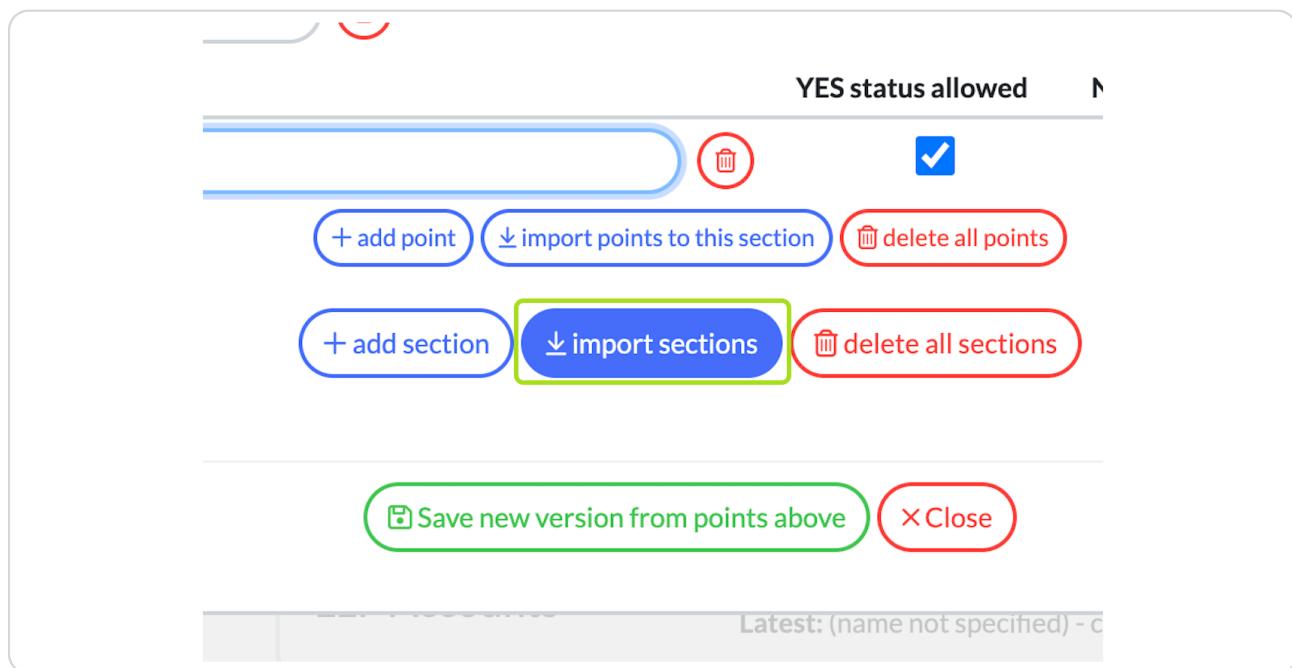
STEP 8

Type the name of the point



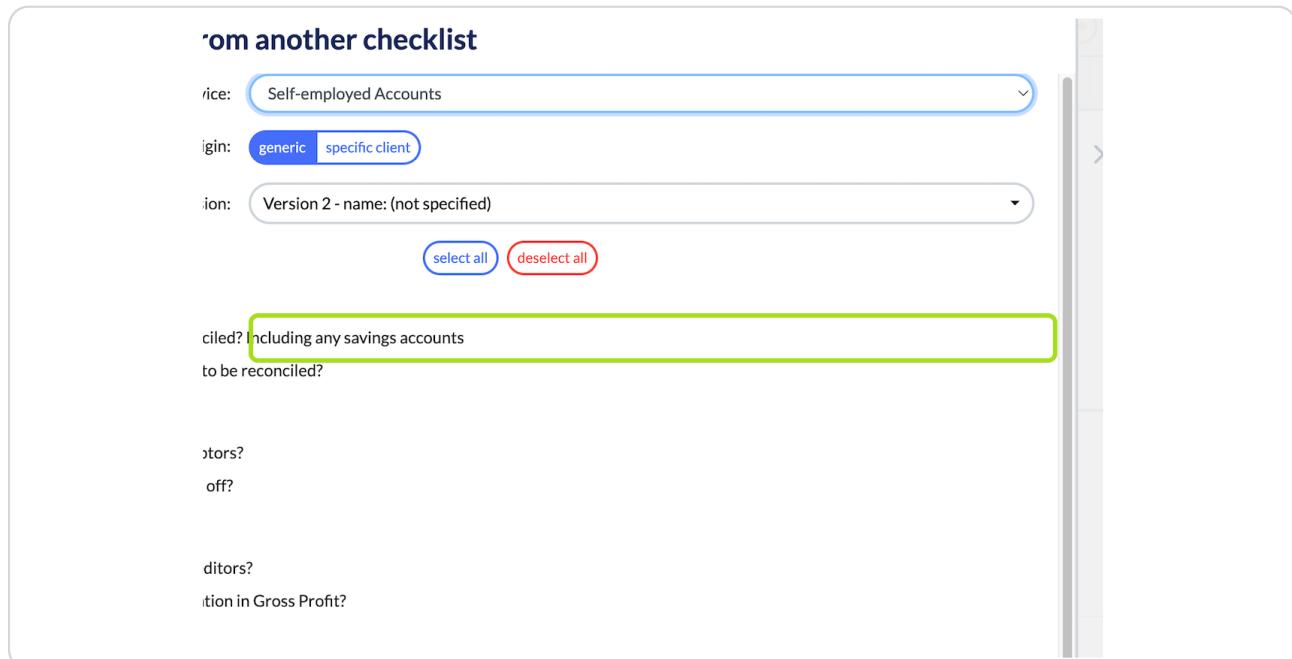
STEP 9

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



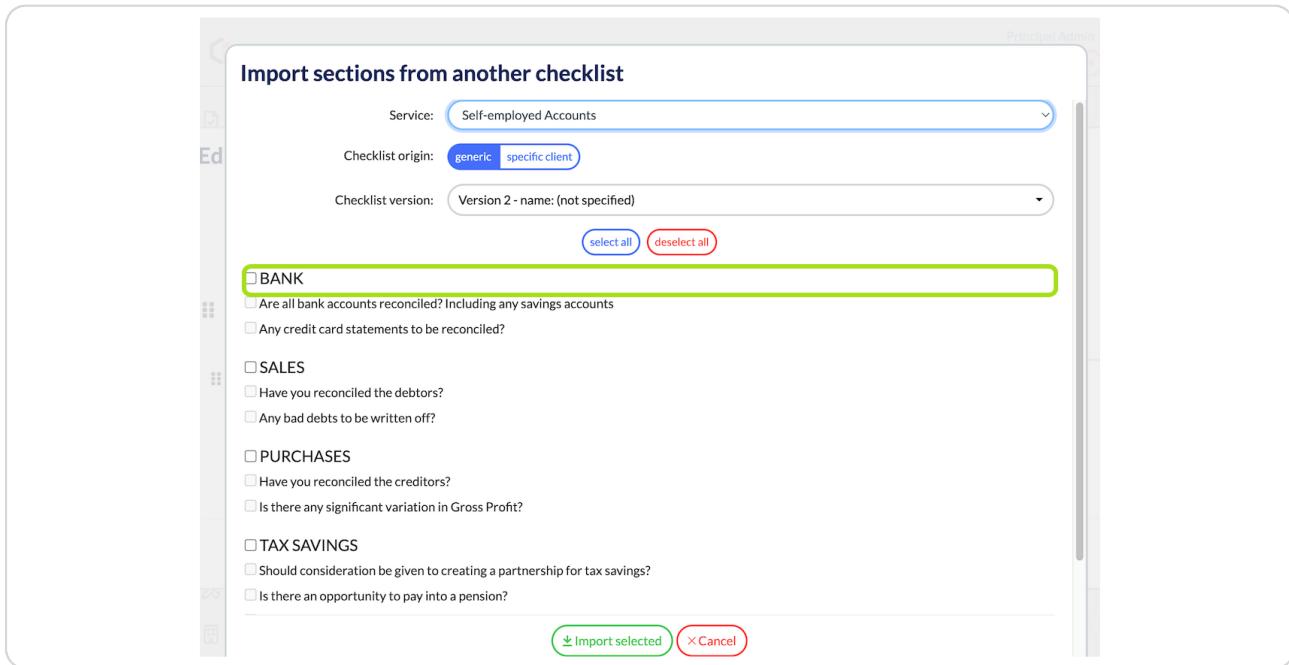
STEP 10

Select check list you want to import from



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)

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

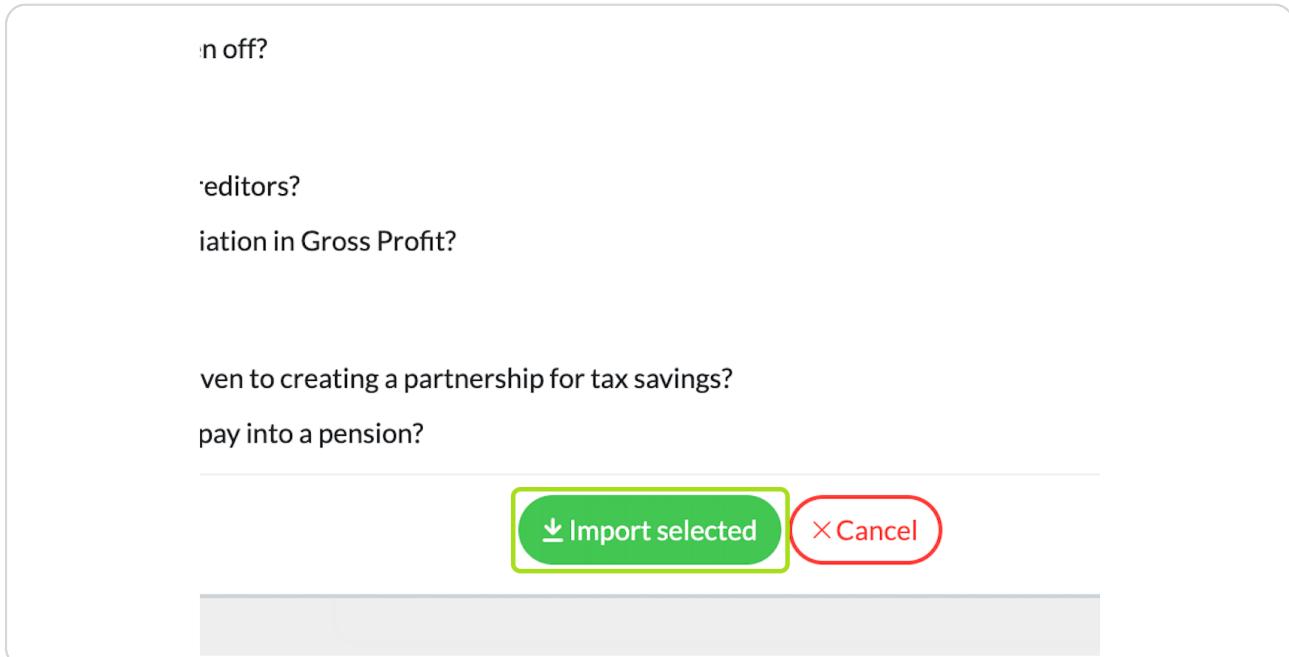
Should consideration be given to creating a partnership for tax savings?

Is there an opportunity to pay into a pension?

Import selected

STEP 12

Click on Import selected

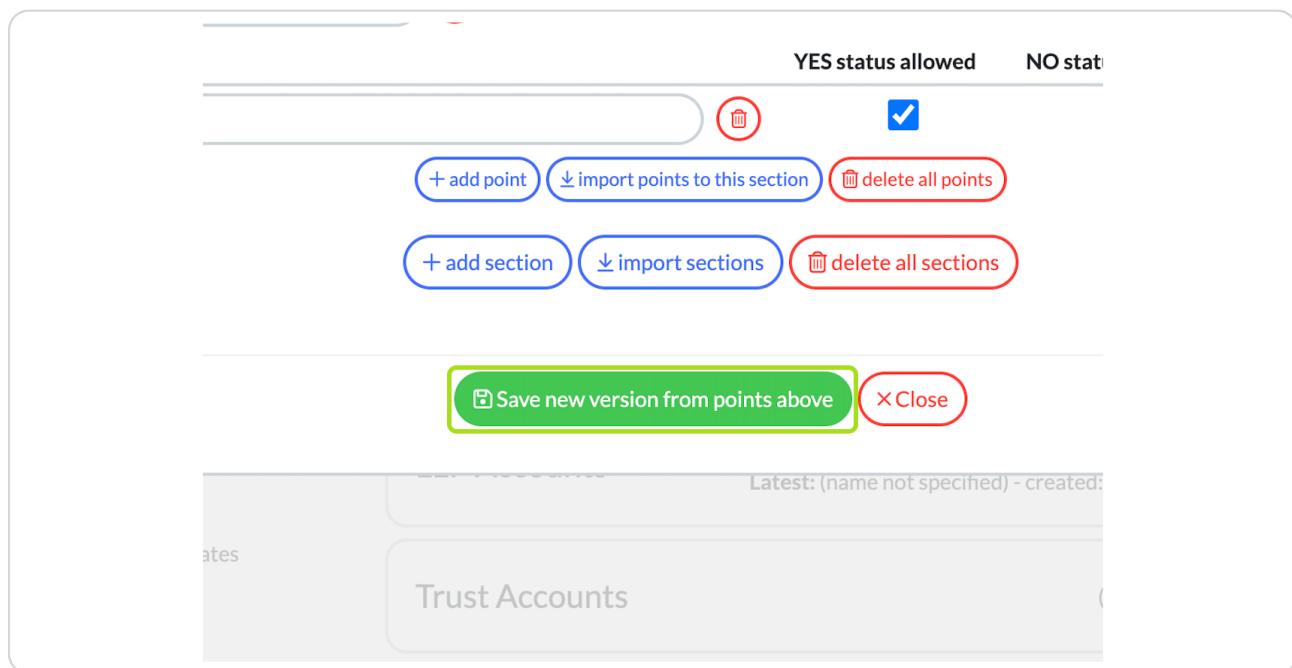


Import selected

Cancel

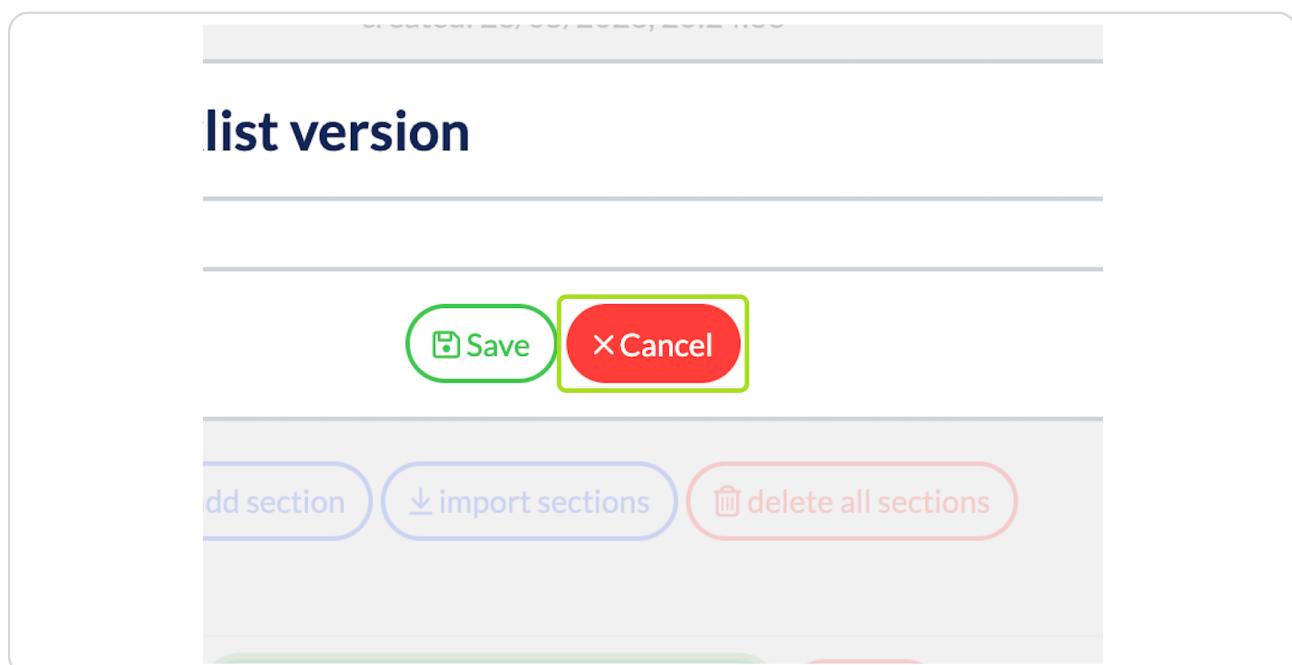
STEP 13

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



STEP 14

Click on **Save**



Tango

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