

Finding completed job checklists and audit trails

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

Created by

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Creation Date

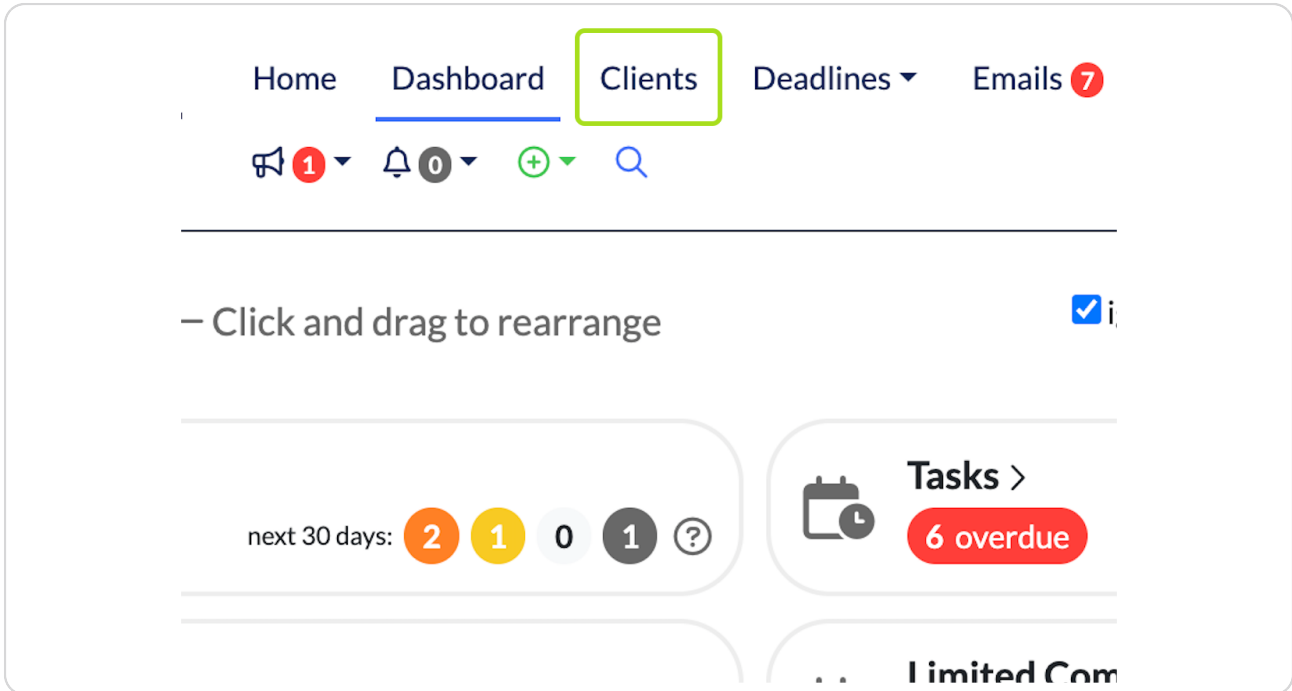
December 31, 2023

Last Updated








December 31, 2023

STEP 1

Click on Clients



The screenshot shows the dashboard interface with the following elements:

- Navigation bar: Home, **Dashboard**, **Clients** (highlighted with a green box), Deadlines ▾, Emails **7**.
- Notification bar:  **1** ▾,  **0** ▾,  ▾, .
- Instruction: – Click and drag to rearrange  i.
- Summary cards:
 - next 30 days: **2** **1** **0** **1** 
 -  **Tasks >**
6 overdue
 - ... **Limited Com**

STEP 2

Click on the client whose checklists or audit log you want to find

Wainwright or Sole
Trader

Client

Engager

Online

Limited

qb

Limited Company

(in progress)

N/A

STEP 3

Click on the arrow next to the service you are looking for to expand it

Tax References

Work

Deadlines

Tailored checklists

qb

Invoices (QuickBooks)

>

Onboarding - SA

Fee: £0 monthly

>

Limited Company Acco

Fee: £1,068 annually

>

VAT

Created with *Tango*

3 of 6

STEP 4

Here you will see the Checklists...

Records received: not set

Internal deadline: not set

Frequency: one-off job

Auto internal deadline: 6 months before due date (default)

One-off completed: ✗ not completed

2. Preparation: HB not completed

3. Approval: SJ not completed

4. Filing: HB not completed

Additional info

Records location: Xero

✓ Agent authorisation granted

General remarks:

Checklists

Audit trail

100% Needs fee review: no

Started: 03/02/2023 19:15:11

Completed: 16/08/2023 20:02:05

Statutory deadline: 31/12/2023

> VAT

enabled

Fee: £135 quarterly

Next due date: 07/10/2024

Internal deadline: 22/09/2024

Records received: not set

Current phase: PJ Collect records 4 phases to complete

< previous: Terms

STEP 5

Click on Audit trail to see the audit histroy

not completed

Audit trail

1

Completed: 16/08/2023 20:02:05

Statutory deadline: 31/12/2023

enabled

STEP 6

here you will see the history of the audit trial

Frequency: one-off job

Auto internal deadline: 6 months before due date (default)

One-off completed: ✗ not completed

4. Filing: HB not completed

Additional info

Records location: Xero

✓ Agent authorisation granted

General remarks:

Checklists

Audit trail

#1 Field value was changed

Principal Admin PA

21/12/2023 10:21:25

• Fee: £40.00 → £1,068.00

• Fee period: monthly → annually

• Annual fee: £480.00 → £1,068.00

• Records location: Sage → Xero

#2 Field value was changed

Principal Admin PA

18/12/2023 14:22:34

Changed after applying an update from Companies House.

• Next due: 31/12/2023 → 31/12/2024

> VAT

enabled

< previous: Terms

Tango

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