

# Finding completed job checklists and audit trails

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Created by

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Creation Date

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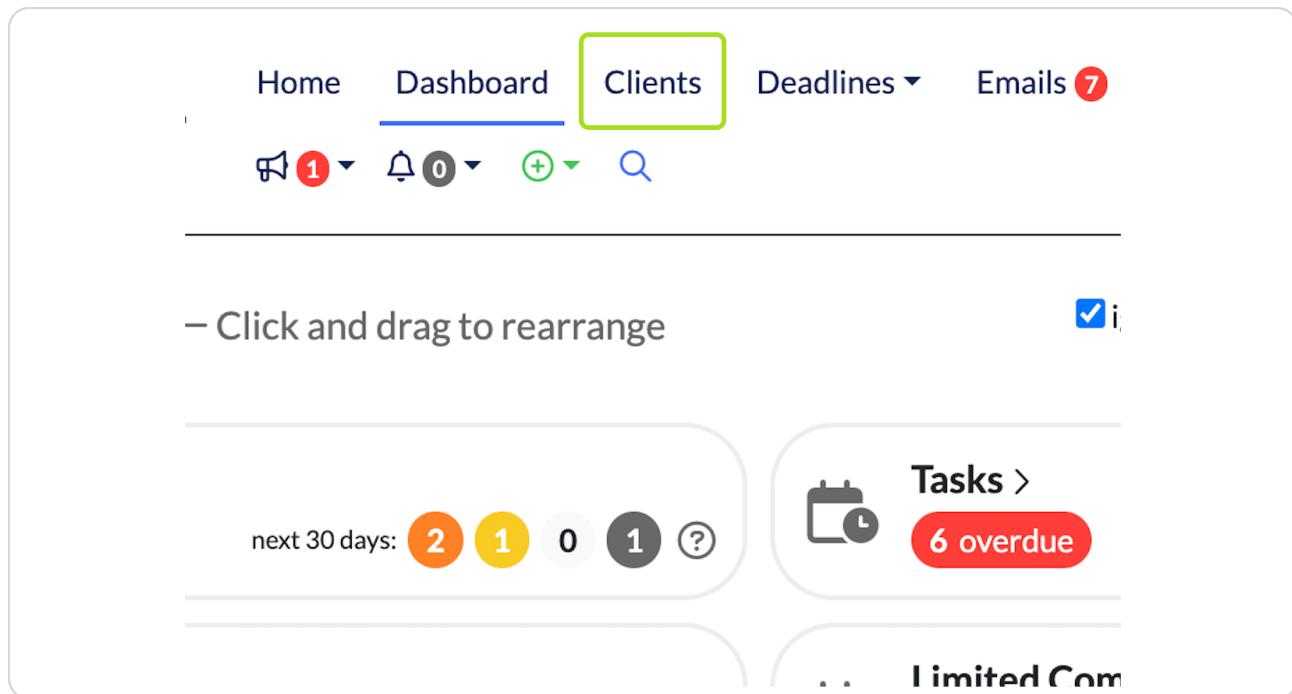
Last Updated

December 31, 2023



## STEP 1

### Click on Clients



The screenshot shows the Client Engager dashboard. The top navigation bar includes links for Home, Dashboard (underlined in blue), Clients (highlighted with a green box), Deadlines, and Emails (with a red notification badge showing 7). Below the navigation are four action buttons: a red speaker icon with a '1' (notification), a grey bell icon with a '0', a green plus icon with a '0', and a blue search icon. A horizontal line separates this from the main content area. In the main area, there are two main sections. The left section, titled 'next 30 days:', shows four colored circles with numbers: orange (2), yellow (1), light grey (0), and dark grey (1). A question mark icon is also present. The right section, titled 'Tasks >', shows a calendar icon and a red button with the text '6 overdue'. Below these sections, the text 'I limited Com' is partially visible. A note on the right says '– Click and drag to rearrange' with a checkmark icon.

## STEP 2

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



Wainwright or Sole  
Trader

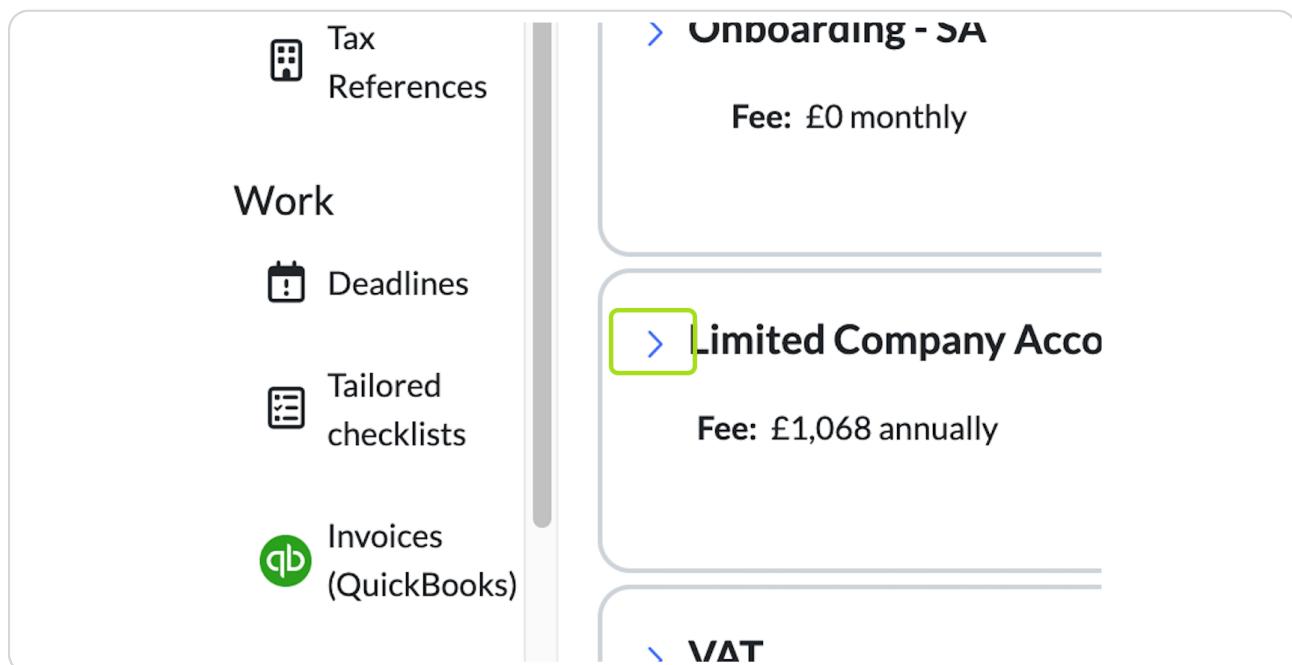
Client Engager Online Limited (in progress) N/A

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## STEP 3

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



Tax References

Work

Deadlines

Tailored checklists

Invoices (QuickBooks)

> Onboarding - SA  
Fee: £0 monthly

> Limited Company Acco  
Fee: £1,068 annually

< VAT

## STEP 4

Here you will see the Checklists...

The screenshot shows the audit checklist interface for 'Small Business Limited Company'. At the top, it displays the following status indicators:

- Records received: not set
- Internal deadline: not set
- Frequency: one-off job
- Auto internal deadline: 6 months before due date (default)
- One-off completed: X not completed

Below these, there are sections for 'Additional info' (Records location: Xero, Agent authorisation granted checked), 'General remarks' (empty), and a 'Checklists' section. The 'Checklists' section contains the following data:

100% Needs fee review:	Started:	Completed:	Statutory deadline:
<input checked="" type="checkbox"/>	03/02/2023 19:15:11	16/08/2023 20:02:05	31/12/2023

Below the 'Checklists' section is a 'VAT' section with the following details:

Fee:	Next due date:	Current phase:
£135 quarterly	07/10/2024	PJ Collect records 4 phases to complete

At the bottom left is a link to 'previous: Terms'.

## STEP 5

Click on Audit trail to see the audit history

The screenshot shows the audit history interface for 'Small Business Limited Company'. At the top, it displays the following status indicators:

not completed

Below this is a 'Checklists' section with the following data:

Completed:	Statutory deadline:
16/08/2023 20:02:05	31/12/2023

Below the 'Checklists' section is an 'Audit trail' section with the following details:

Audit trail	
Completed:	16/08/2023 20:02:05
Statutory deadline:	31/12/2023

At the bottom right is a green 'enabled' status indicator.

## STEP 6

here you will see the history of the audit trial

The screenshot shows a software interface for managing audit trials. At the top, it displays the company name 'Bogus Limited' and the trial status 'not completed'. Below this, it shows the frequency as 'one-off job', the auto internal deadline as '6 months before due date (default)', and the one-off completed status as 'not completed'. The 'Audit trail' section is highlighted with a green border and contains two entries:

- #1 Field value was changed (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 (18/12/2023 14:22:34):
  - Changed after applying an update from Companies House.
  - Next due: 31/12/2023 → 31/12/2024

Below the audit trail, there is a 'VAT' section with the status 'enabled'. At the bottom left, there is a link to 'previous: Terms'.

# Tango

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