

Setting up your letter of professional clearance

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Created by

Johann Goree

Creation Date

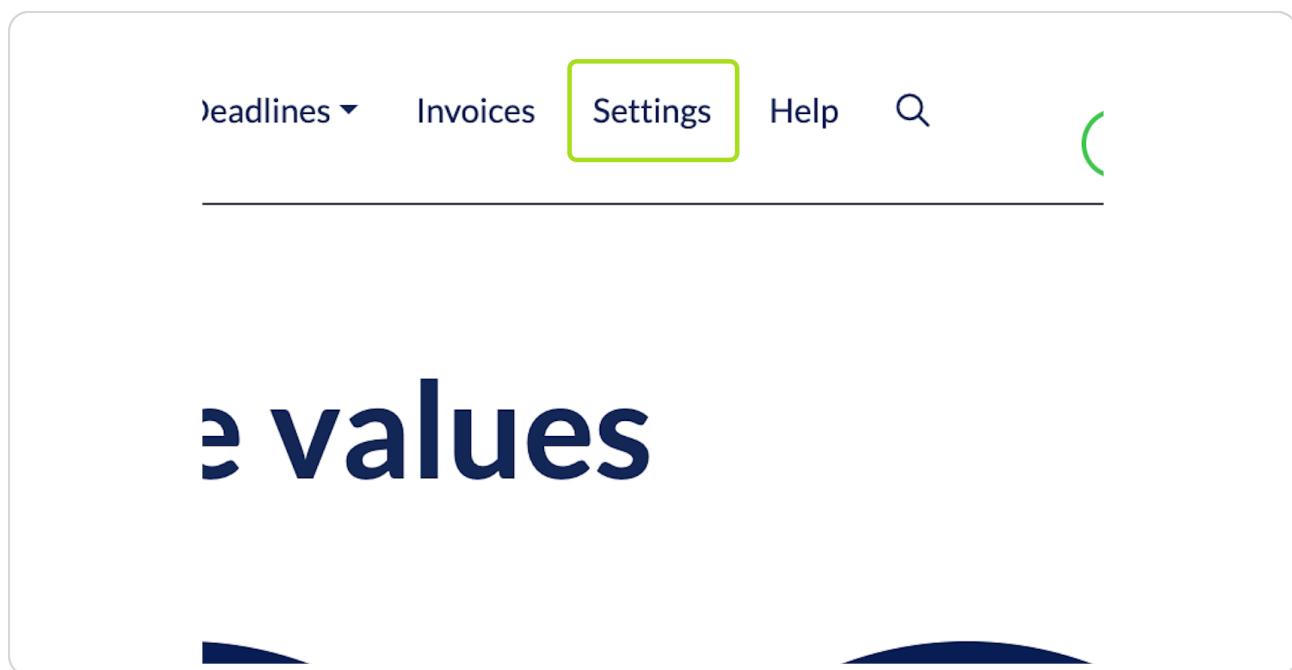
May 23, 2023

Last Updated

May 23, 2023

STEP 1

Click on Settings



STEP 2

Click on Professional Clearance Letters

A screenshot of the 'Documents' section within the 'Settings' menu of the e-values software. On the left, there is a sidebar with 'Documents' at the top, followed by 'Document layout', 'Document templates', and 'Professional Clearance Letters' (which is highlighted with a blue box). Below this is a 'Staff' section with 'Departments' and 'System users'. On the right, there are several configuration fields: 'Sender name for texting:' (with 'Eng' and '11 of' visible), 'Company Number:' (with '098'), 'Is VAT registered:' (with a green checkmark and 'yes'), 'VAT Number:' (with '123'), 'VAT Rate (%):' (with '17'), and 'Logo:' (with a small red square icon). The background is white, and the overall layout is clean and organized.

STEP 3

Enter the text for each item you request and details you need from the accountant

① The points below will be used to generate Professional Clearance Letters you can then send to your accountant to request certain information about the client.

#	Point contents	Applies to:
1	Last full set of accounts submitted to HMRC.	<input type="checkbox"/> all services <input checked="" type="checkbox"/> Limited Company Accounts <input checked="" type="checkbox"/> CT600 <input checked="" type="checkbox"/> Self-employed Accounts <input checked="" type="checkbox"/> Partnership Accounts <input checked="" type="checkbox"/> UK Property Accounts <input type="checkbox"/> SA100 <input checked="" type="checkbox"/> Charity Accounts
2	Capital allowance computation relating to the last set of accounts submitted to HMRC.	<input type="checkbox"/> all services <input checked="" type="checkbox"/> Limited Company Accounts <input type="checkbox"/> CT600 <input checked="" type="checkbox"/> Self-employed Accounts

STEP 4

check the services that this request is relevant to

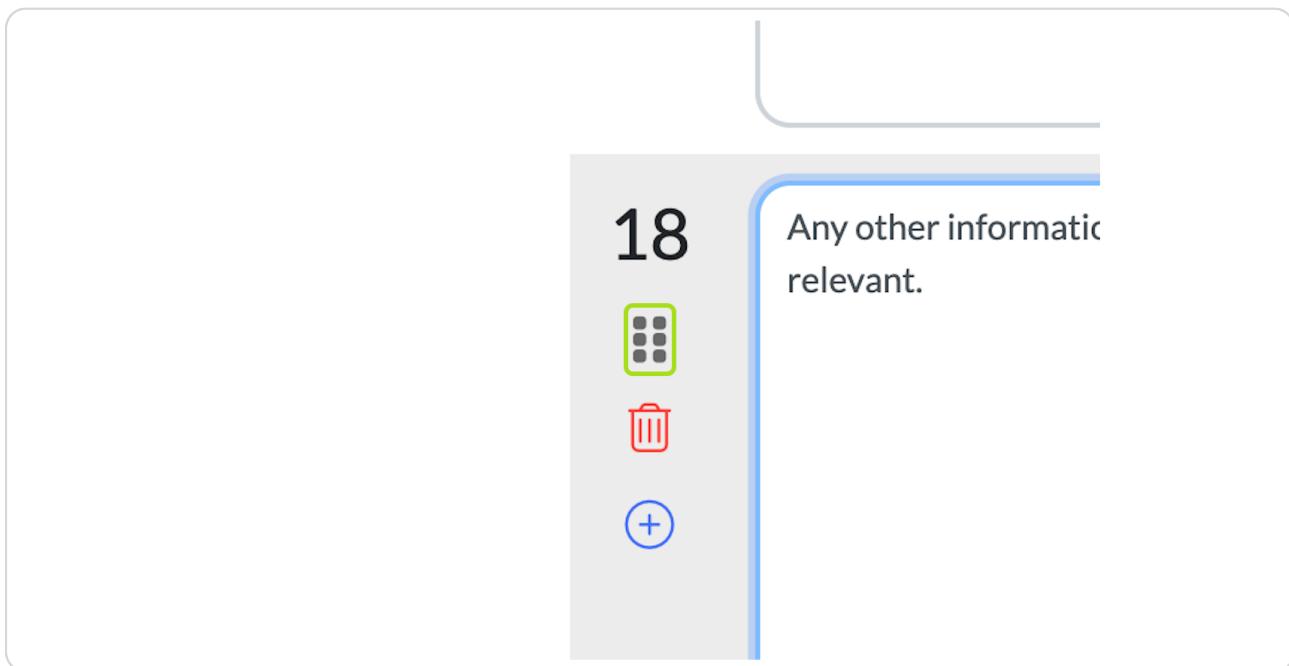
Generate Professional Clearance Letters you can then send to your accountant to request certain information about the client.

Applies to:

s submitted to	<input checked="" type="checkbox"/> all services <input type="checkbox"/> Limited Company Accounts <input type="checkbox"/> CT600 <input type="checkbox"/> Self-employed Accounts <input type="checkbox"/> Partnership Accounts
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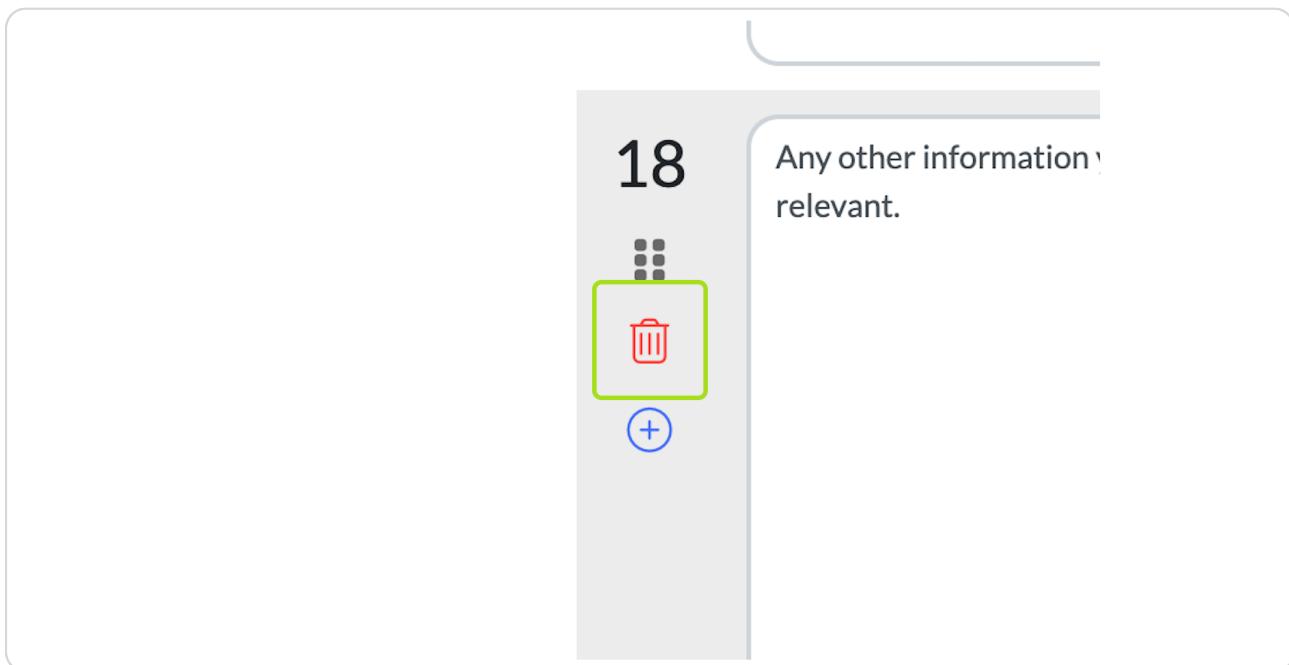
STEP 5

To reorganise the sections click on the 6 dots



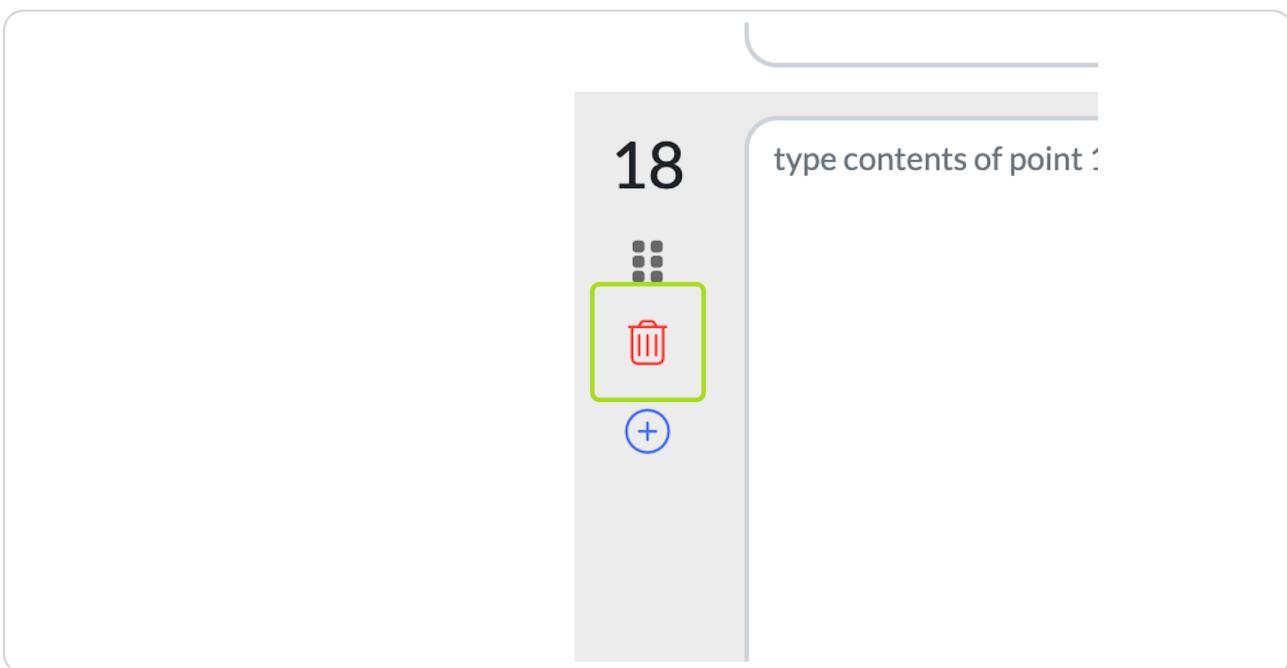
STEP 6

to delete a section select the red bin



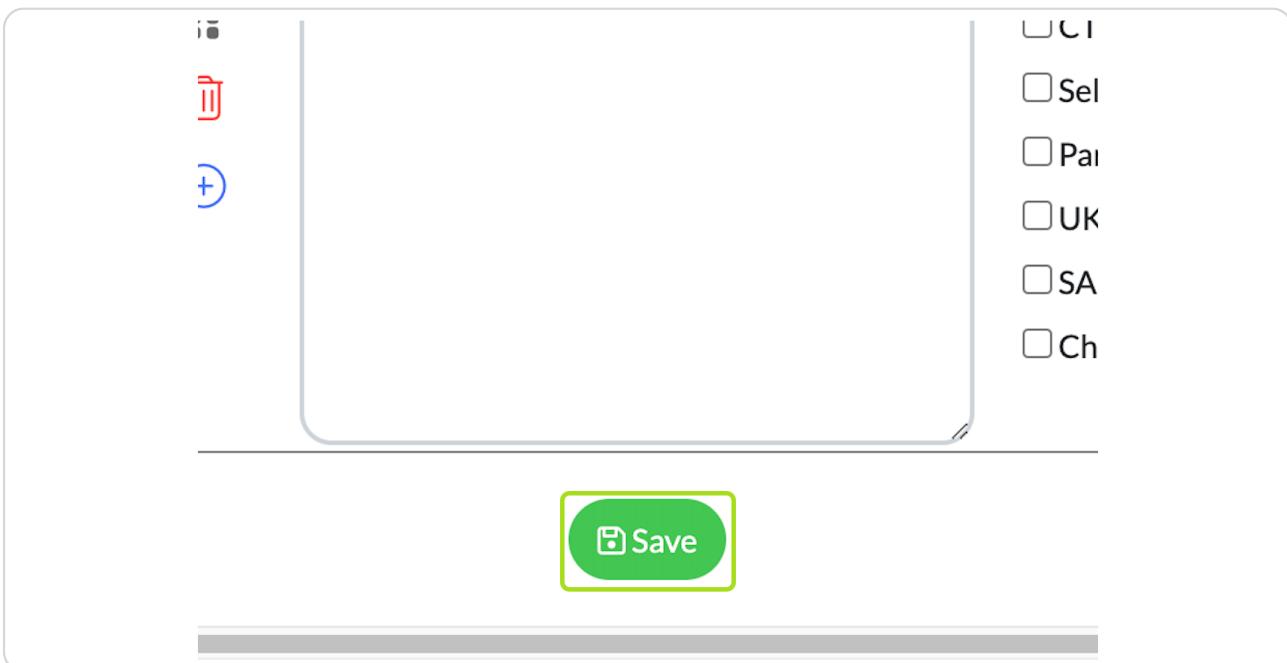
STEP 7

To add a section press the plus symbol



STEP 8

Click on Save



Tango

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