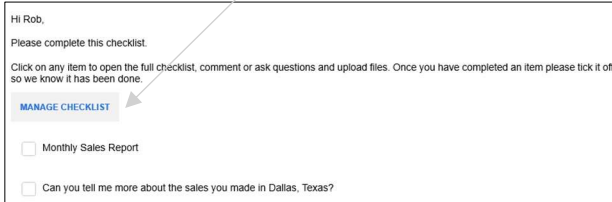**Nelson & Company CPA**

When we request additional information or documents from you, you'll receive an email from our workflow system that asks you to complete a checklist.

Click on 'manage checklist' in the email to see more about the information or documents we are requesting.
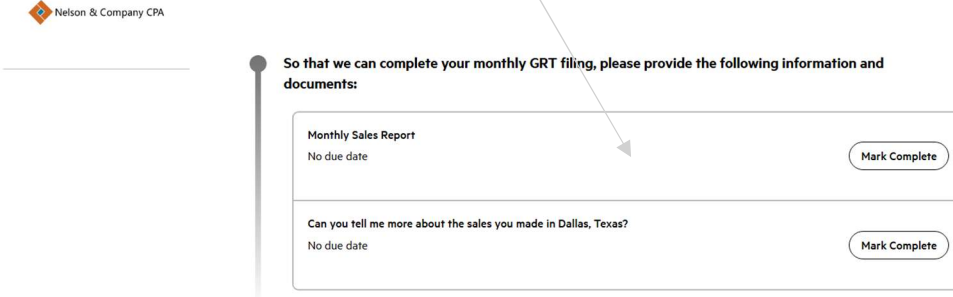
1

Hi Rob,

Please complete this checklist.

Click on any item to open the full checklist, comment or ask questions and upload files. Once you have completed an item please tick it off so we know it has been done.

MANAGE CHECKLIST

☐ Monthly Sales Report

☐ Can you tell me more about the sales you made in Dallas, Texas?

You will see a list of the questions we have or of the documents or information we are requesting. The workflow system refers to these as "tasks" needing completion.
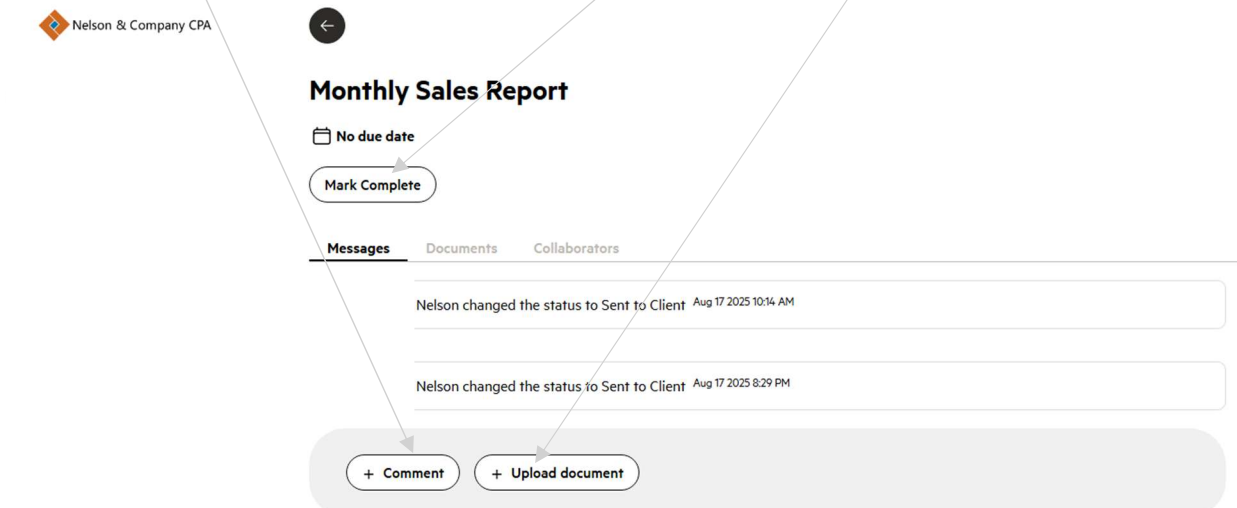
To act on an open item, simply click on it to comment, ask questions or upload files

2

Nelson & Company CPA

So that we can complete your monthly GRT filing, please provide the following information and documents:

Monthly Sales Report
No due date   (Mark Complete)

Can you tell me more about the sales you made in Dallas, Texas?
No due date   (Mark Complete)

Click Comment to comment or ask questions on a task or **Click Upload Document** to attach files to a task. **Don't forget to click MARK COMPLETE** once you have provided all of the information associated with this request.

3

Nelson & Company CPA

←

Monthly Sales Report

📅 **No due date**

(Mark Complete)

Messages   Documents   Collaborators

Nelson changed the status to Sent to Client Aug 17 2025 10:14 AM

Nelson changed the status to Sent to Client Aug 17 2025 8:29 PM

(+ Comment)   (+ Upload document)

Clicking Mark Complete signals that everything for that part of the checklist is complete.

When we request your review or approval or send a document to you, you'll receive an email from our workflow system asking you to click Review and Approve or to let us know that you've received a copy of a document we are sending.

Click on 'review and approve'

1

Hi John,

Please review and approve the July 2025 GRT filing and authorize us to pay on your behalf

Regards,

Review and Approve

You'll land on the approval page showing the file(s) we sent. To **Download**, click the link.

2

Nelson & Company CPA

ZZDoe, John

Approve Please review and approve the July GRT filing and authorize us to pay on your behalf

📅 Due Aug 29 2025

Documents

📄 July GRT.docx

(Download all)

☐ I, ZZDoe, John, have reviewed and approve this document   (Approve)

Approvers

NAME	ROLE	STATUS
Z ZZDoe, John	Assignee	Approval needed

Tick the approval checkbox to confirm receipt. Then, click **APPROVE** to approve our request or, where applicable, to let us know that you've received the document we sent.

3

Nelson & Company CPA

ZZDoe, John

Approve Please review and approve the July GRT filing and authorize us to pay on your behalf

📅 Due Aug 29 2025

Documents

📄 July GRT.docx

(Download all)

☐ I, ZZDoe, John, have reviewed and approve this document   (Approve)

Approvers

NAME	ROLE	STATUS
Z ZZDoe, John	Assignee	Approval needed