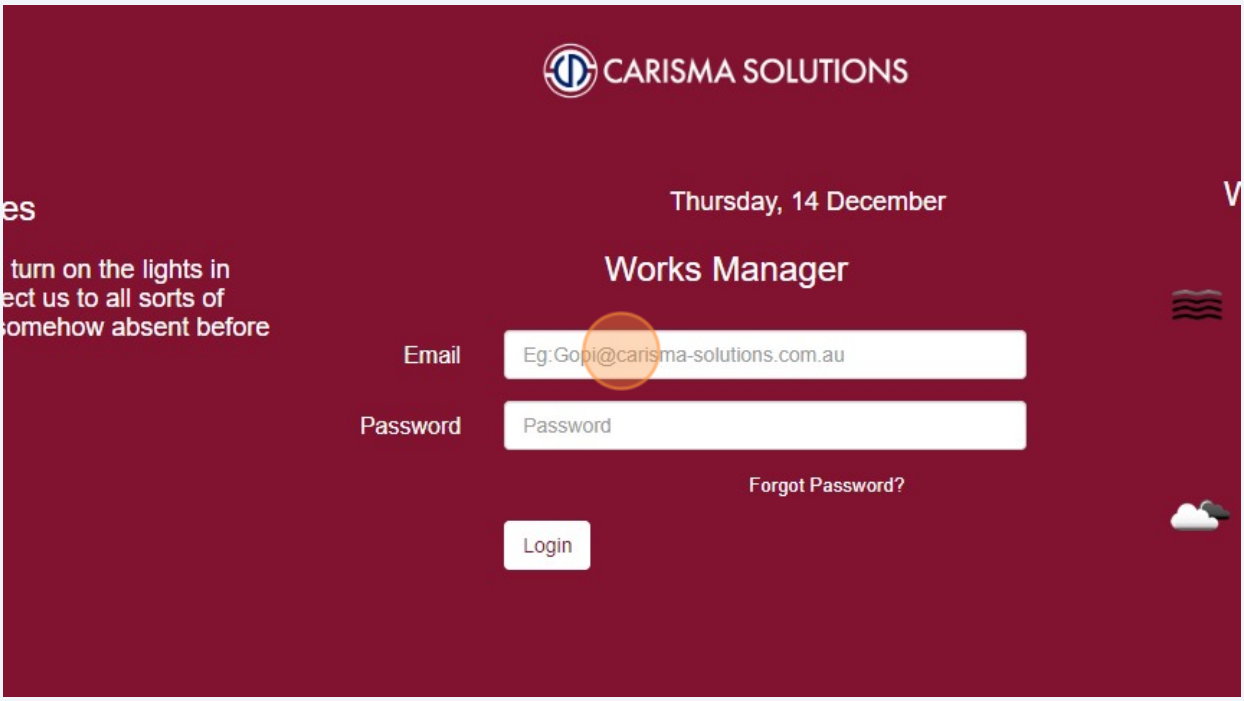
Guide to Inheriting existing checklist into WorksManager

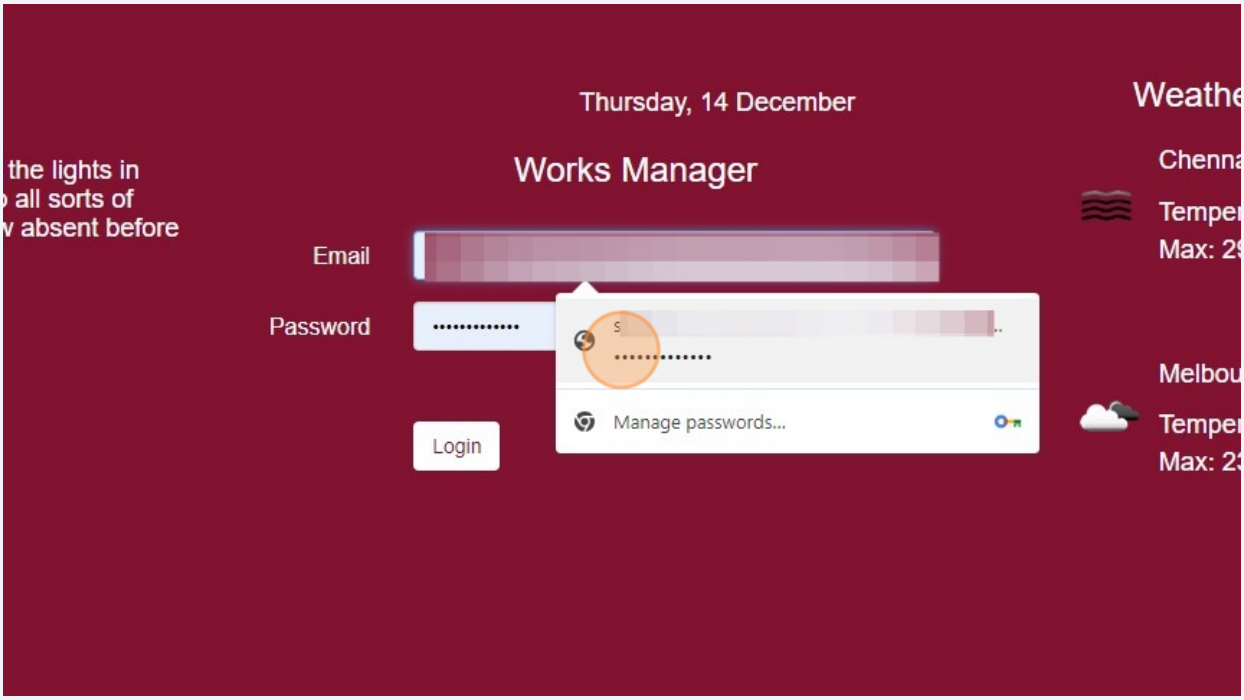
This guide provides step-by-step instructions on how to add a checklist into WorksManager. By following these steps, users can create and customize checklists for their clients, making it easier to manage and ensure all necessary steps are completed to streamline their workflow and improve efficiency in Quality.

Login to WorksManager

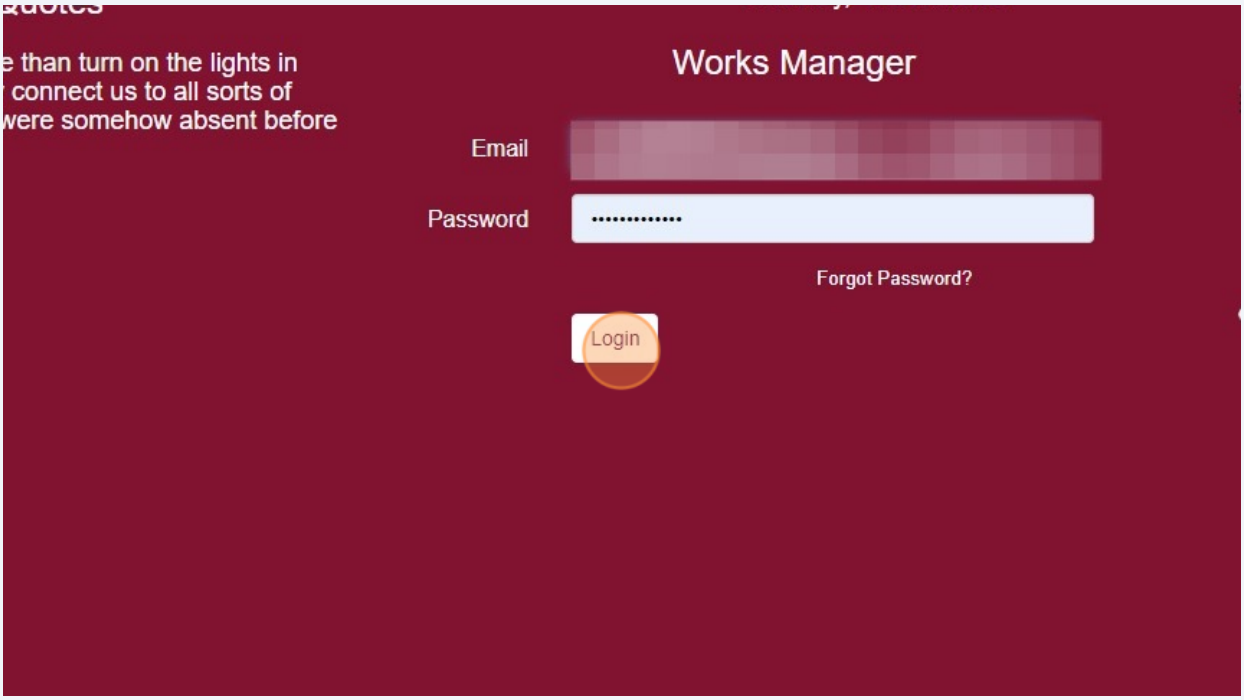
1 Login WorksManager :
http://172.16.29.11/HomeNew.aspx



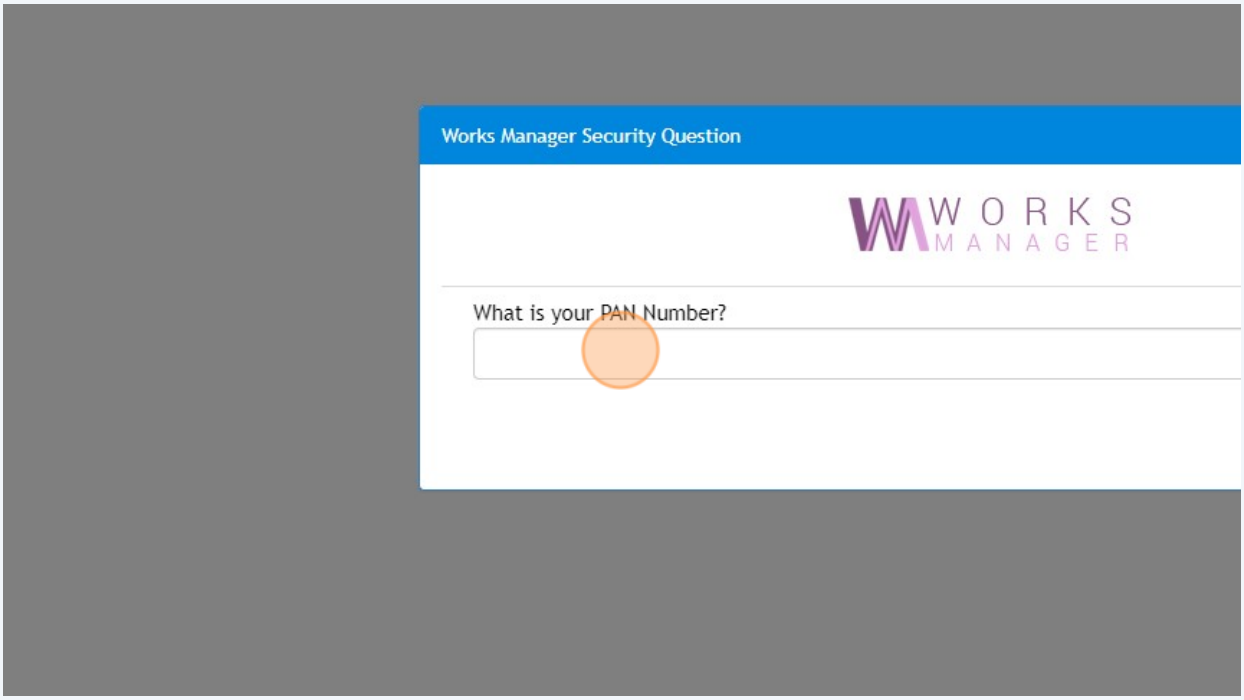
2 Enter Email and Password here.



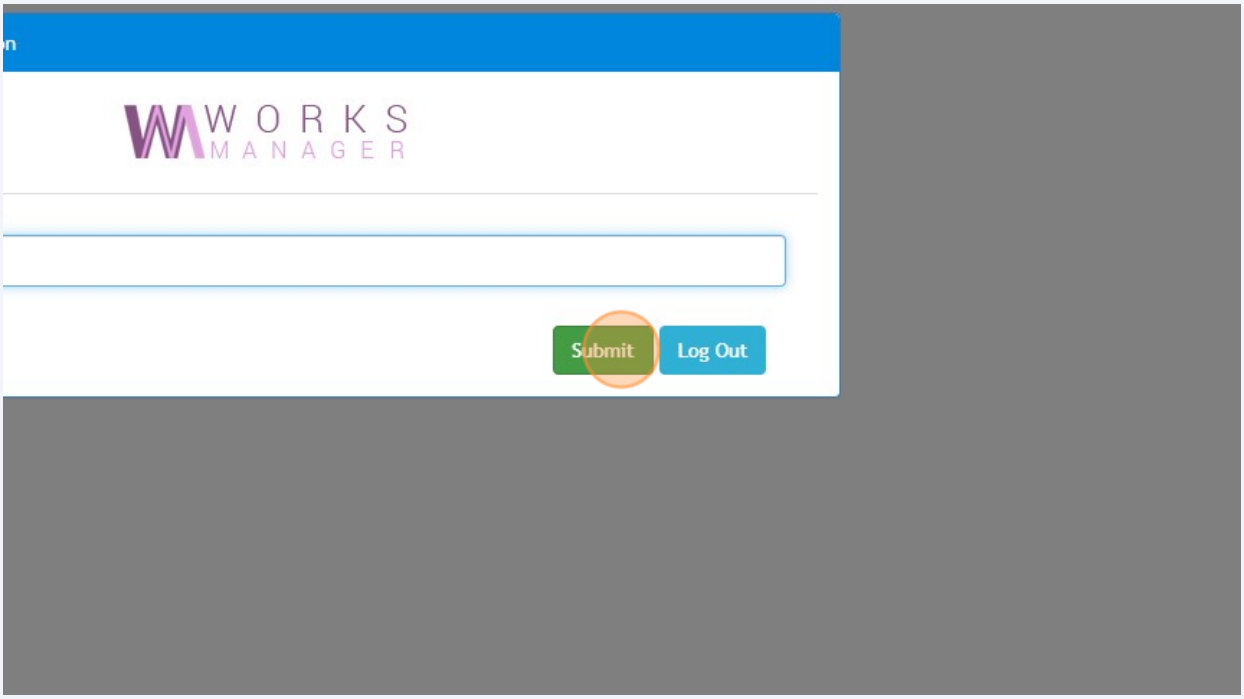
3 Click here to Login.



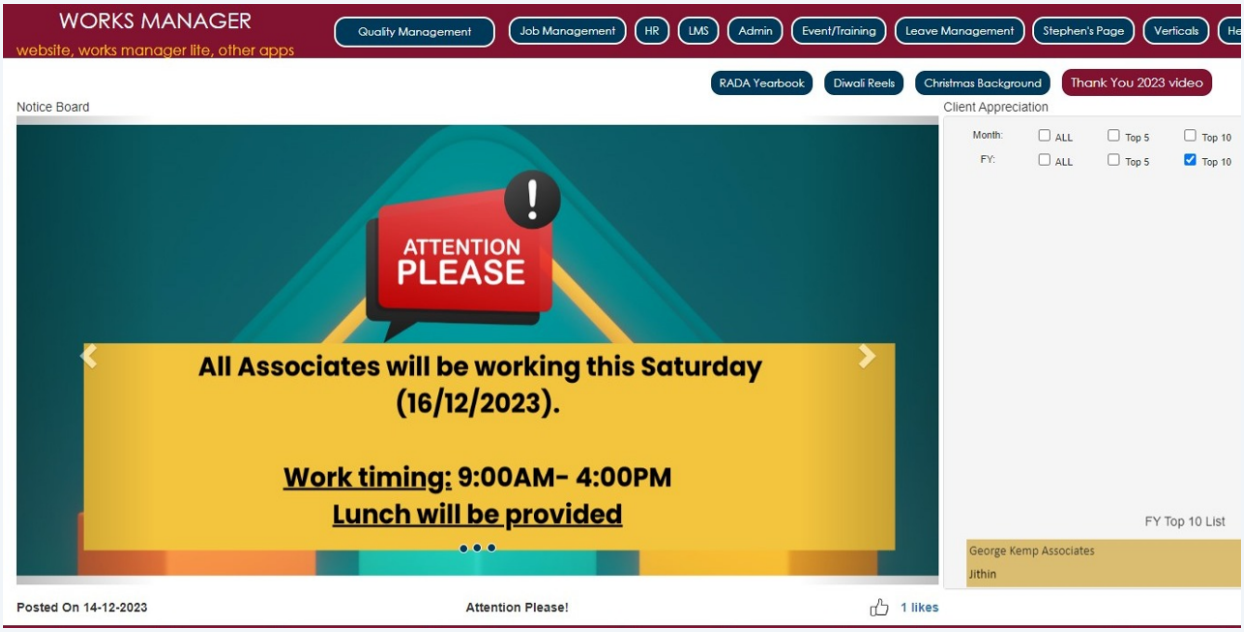
4 Enter your PAN Number here.



5 Click here



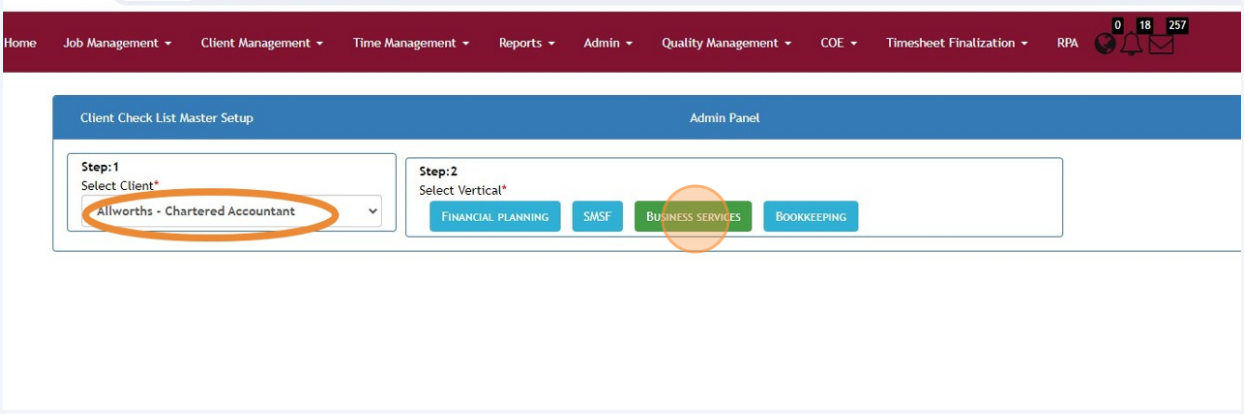
6 Your screen will look like this...



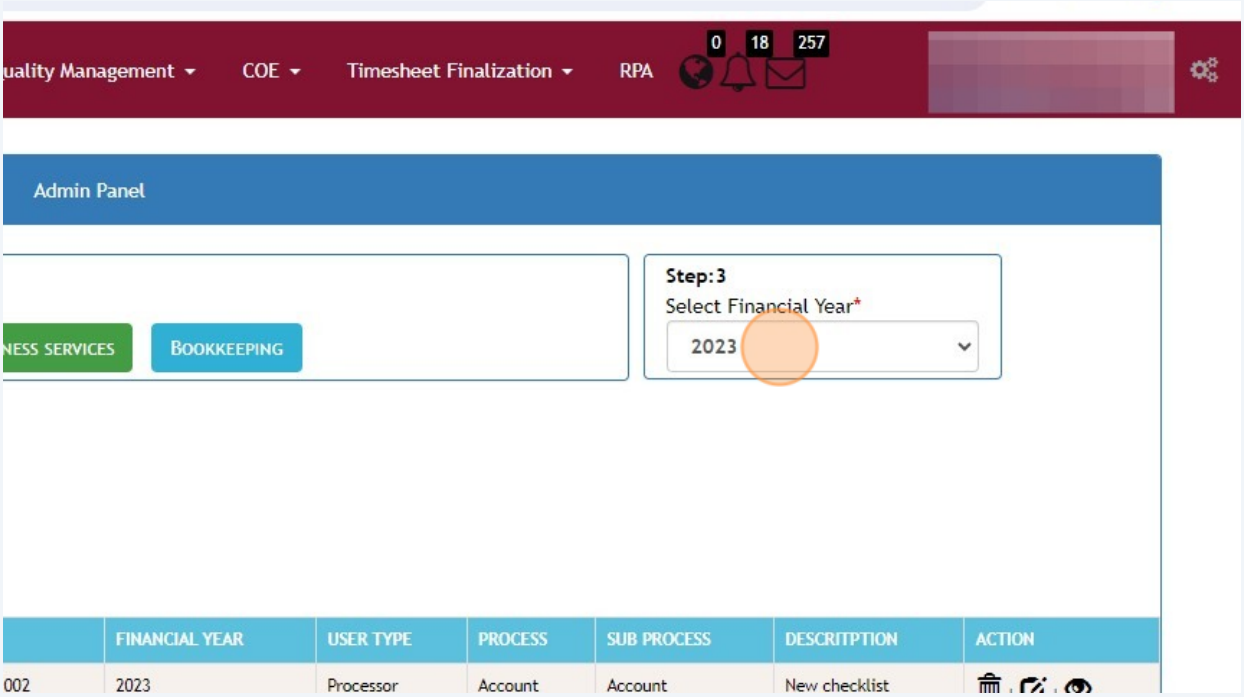
Navigating to Checklist Master Update Link

7 Use the below link to add checklist master to WM for your client
http://172.16.29.11/checklistmaster.aspx

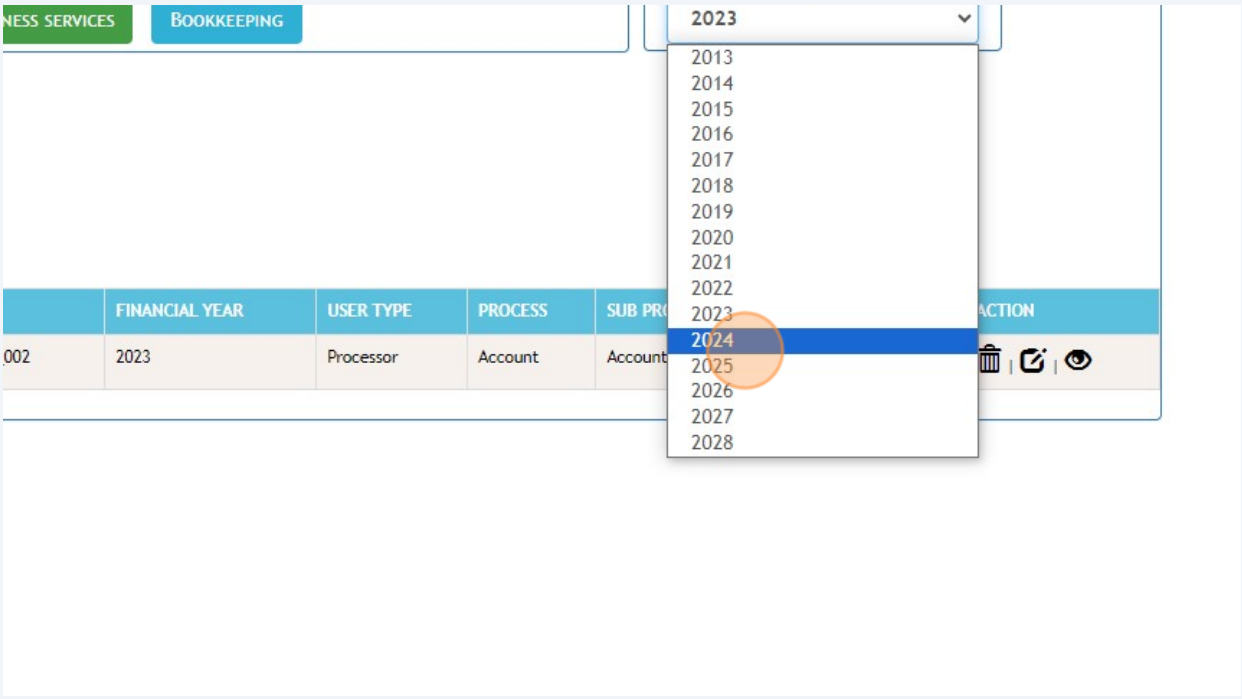
8 Select your client and vertical of service here



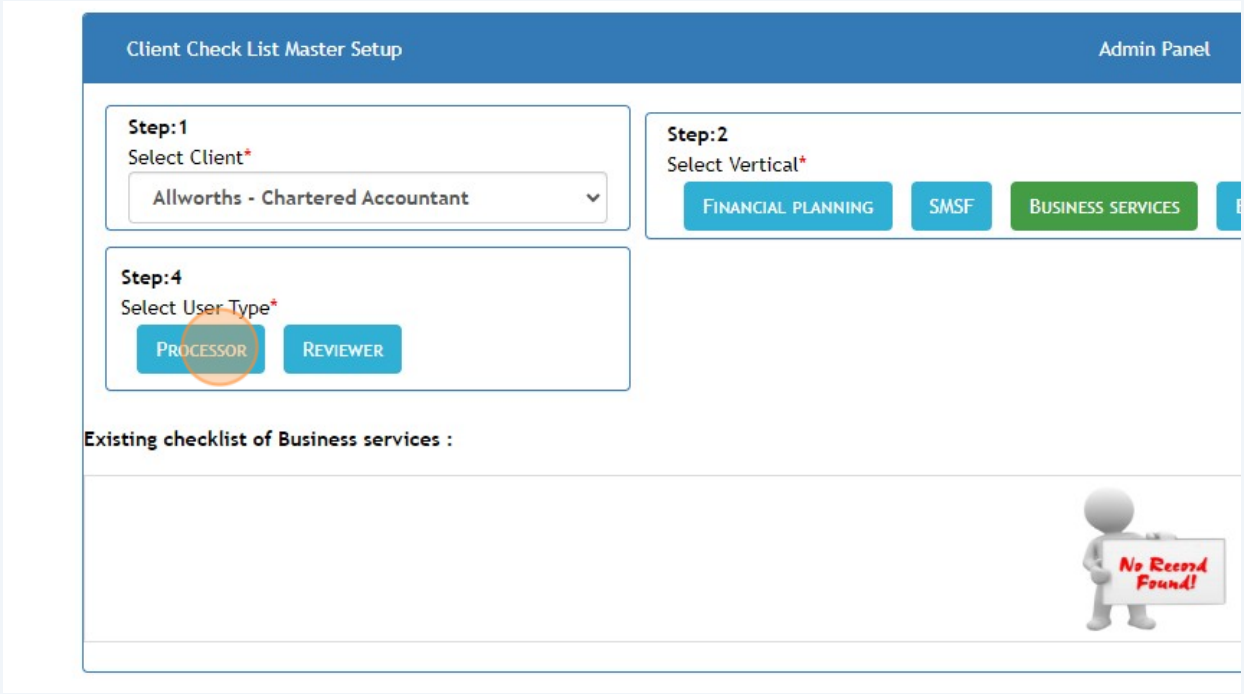
9 Select the relevant Financial Year here



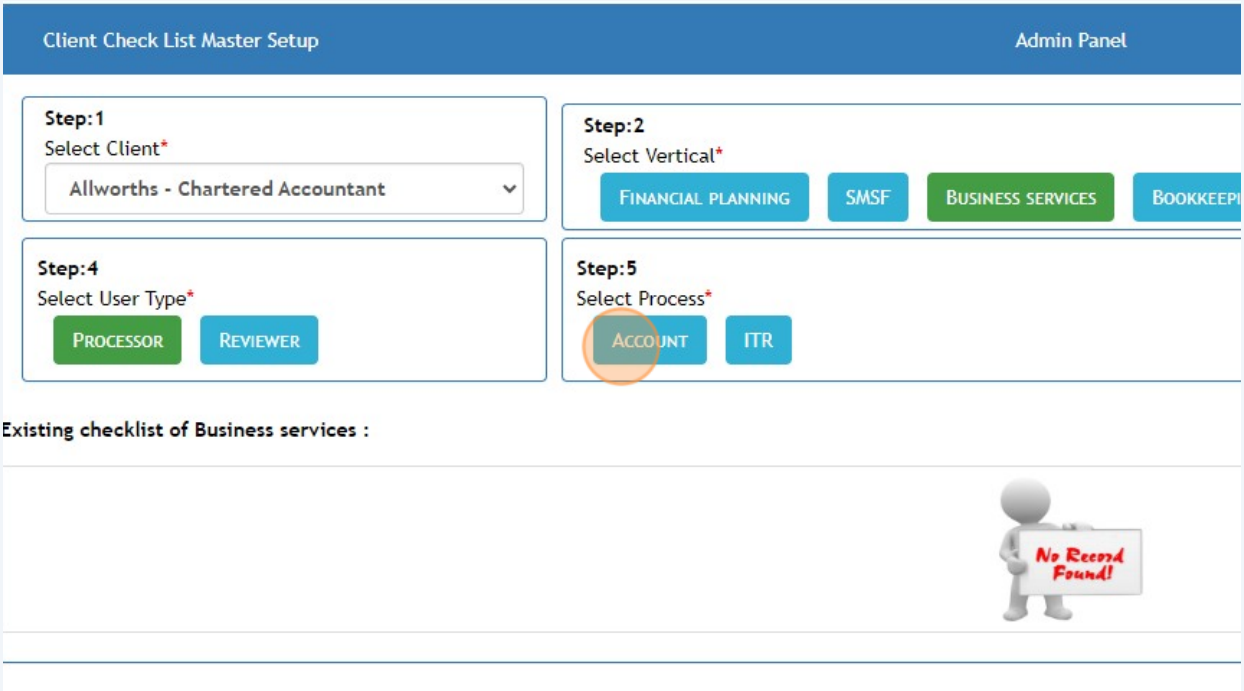
10 Choose Financial Year from the list.



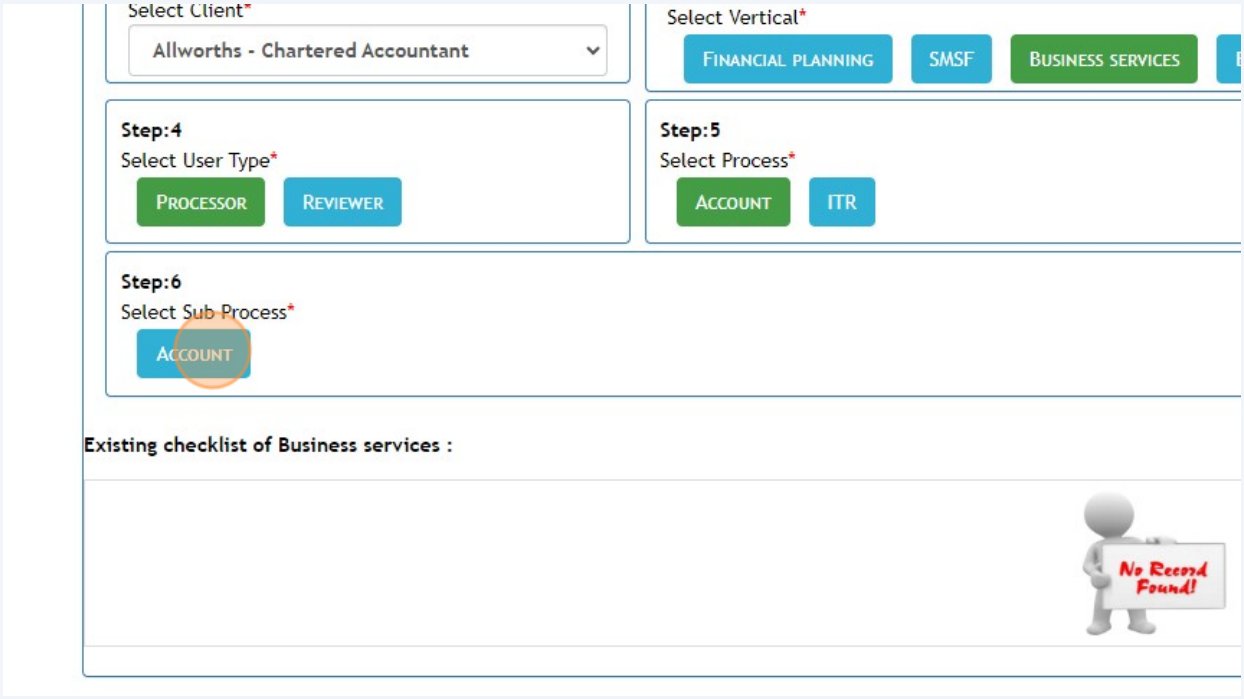
11 Choose the Type of User>> Whether it is Processor or Reviewer?



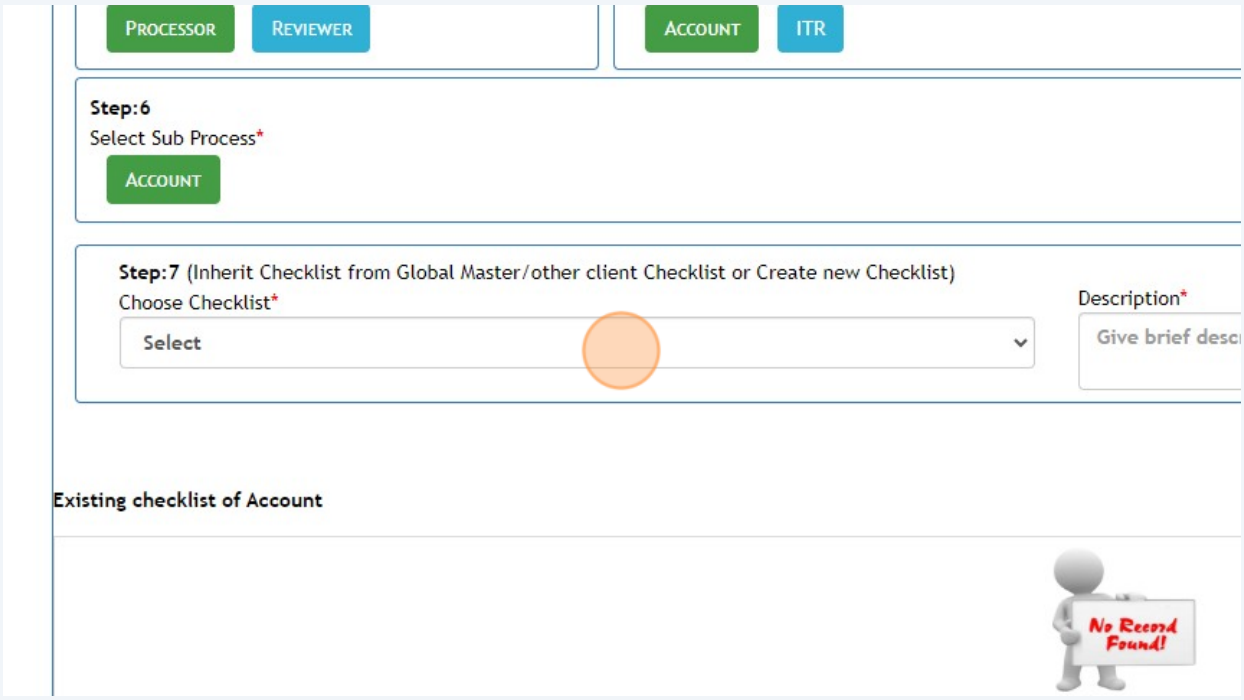
12 Choose the Process Type >> Whether it is Accounts or ITR?



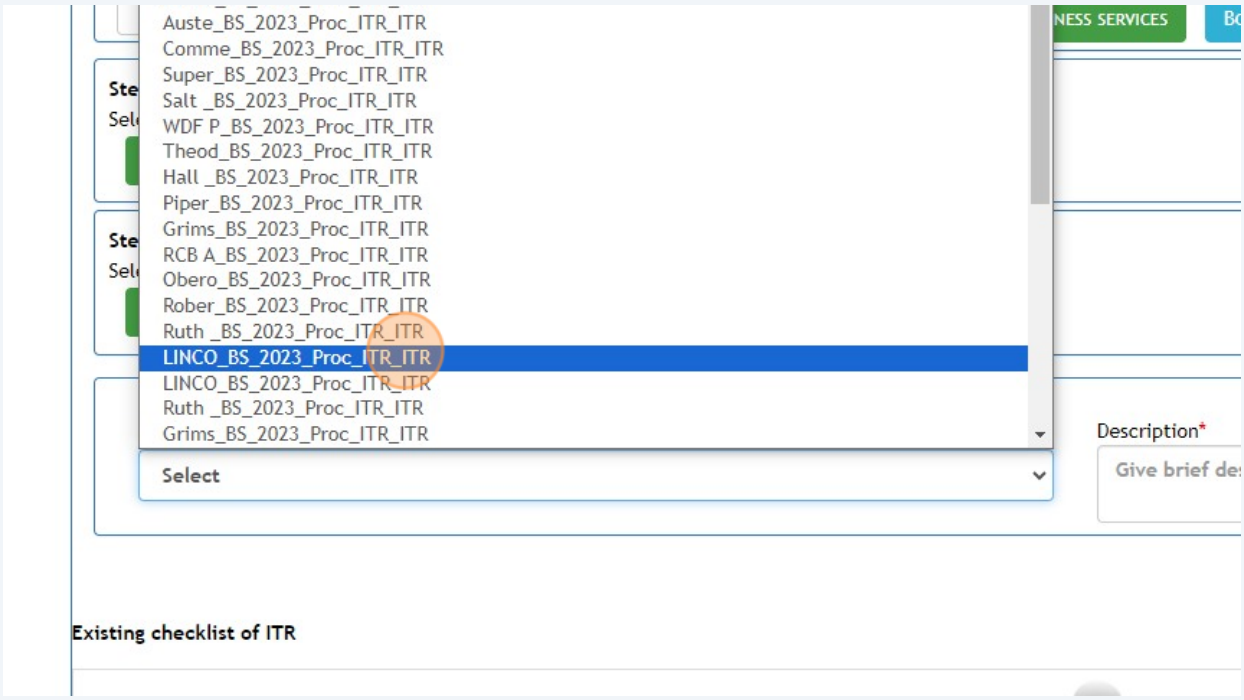
13 Choose the Sub Process >> after selecting the Process Type here.



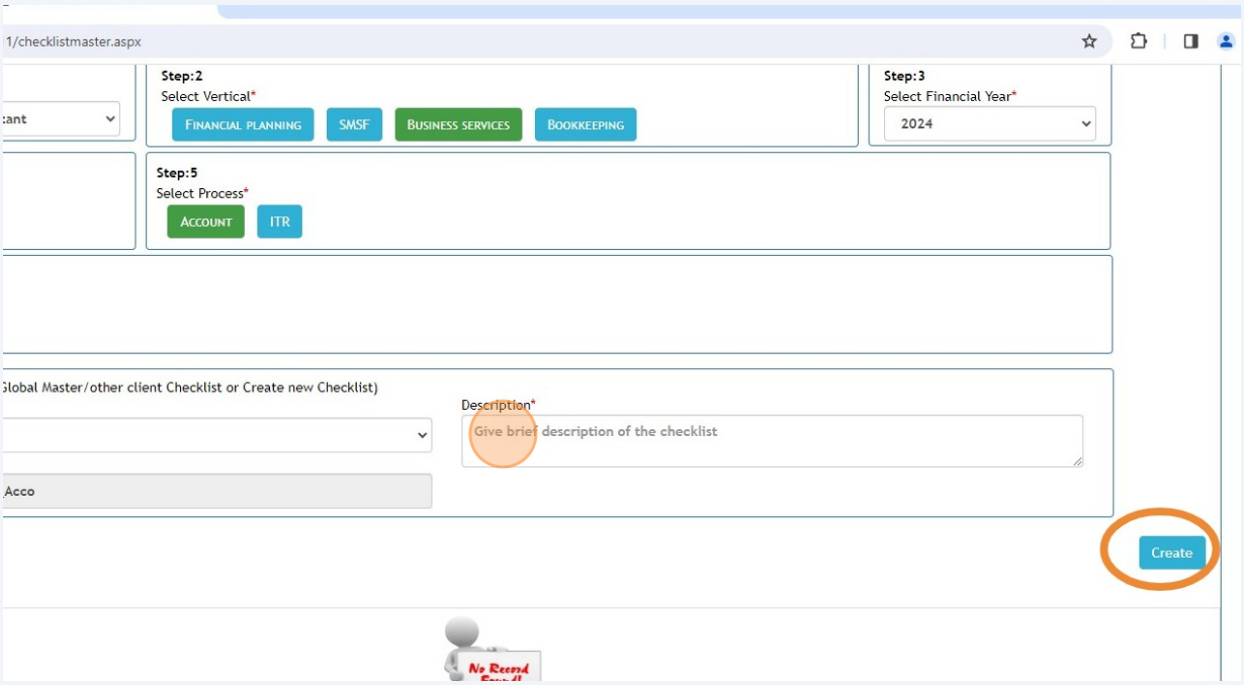
14 Choose the checklist from here >>



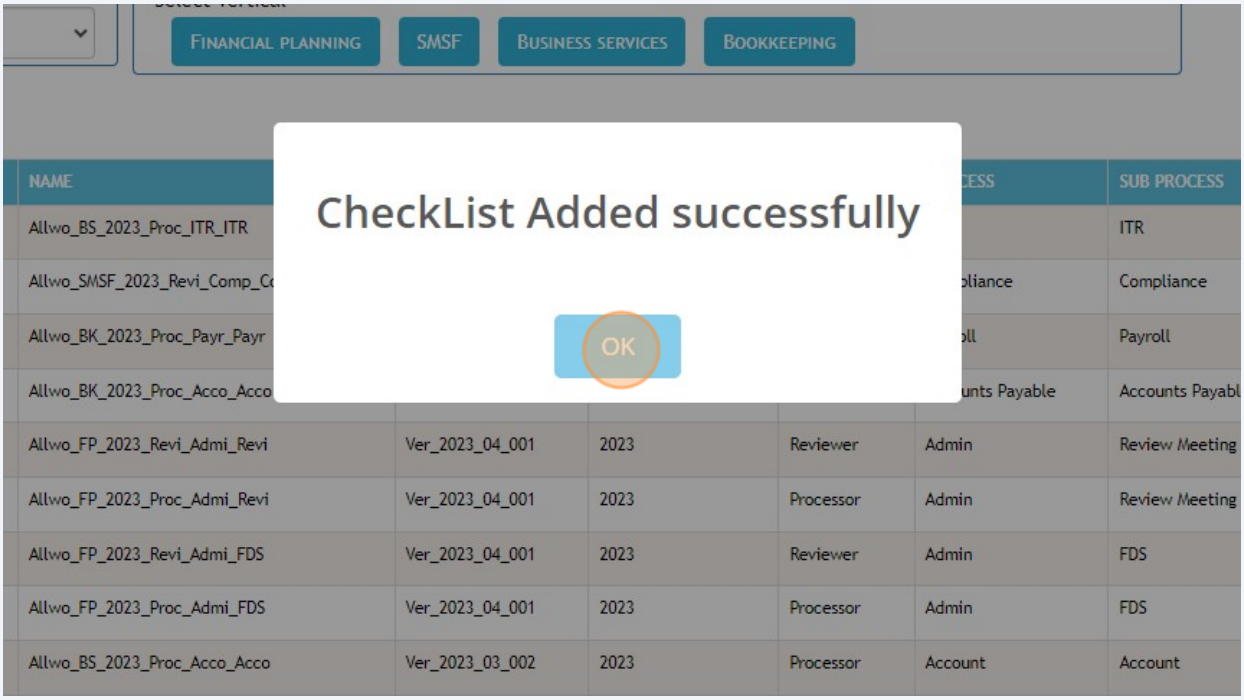
15 Select the relevant master checklist >> You want to Modify or Click Create New checklist per your needs. In this case we are inheriting existing checklist is selected.



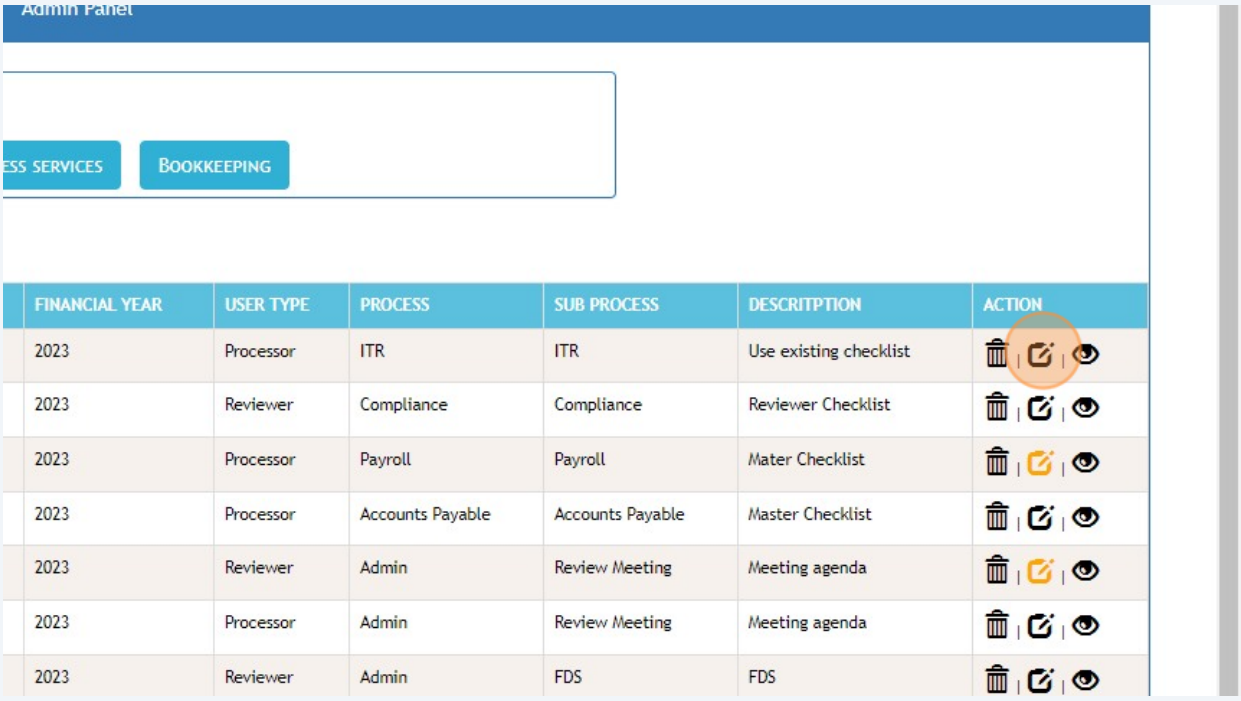
16 Add a description of the checklist>> Hit create once done



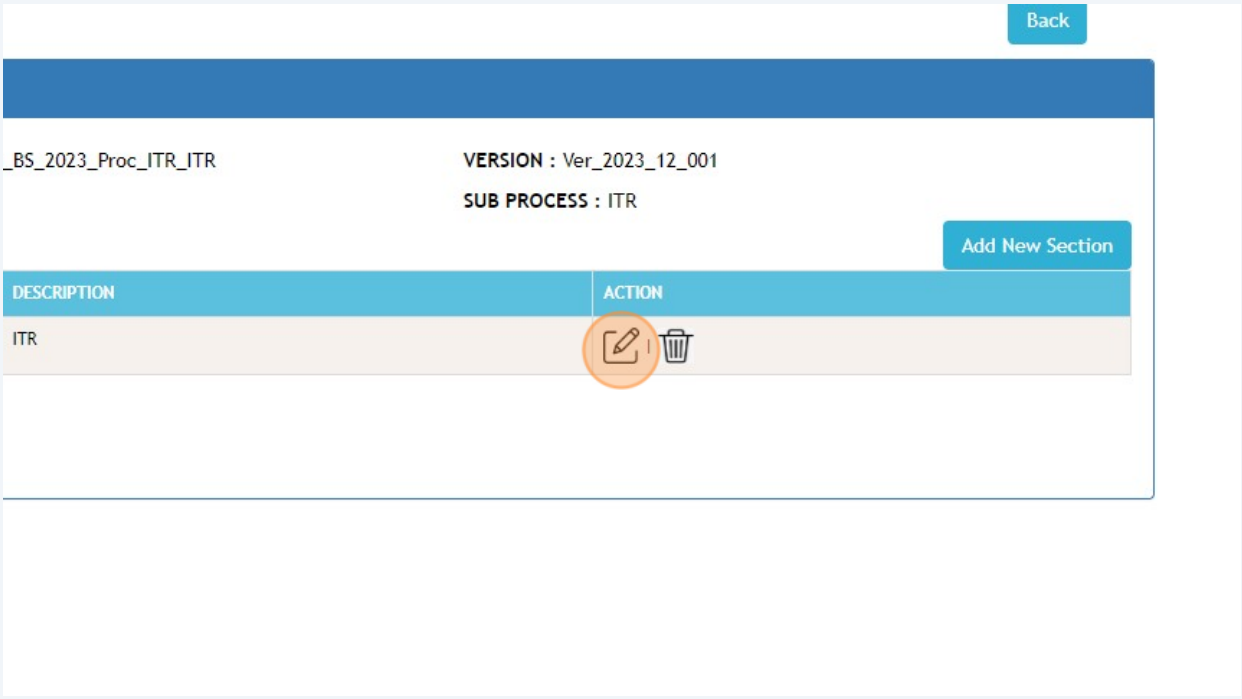
17 Once you click >> **"Create"** >>> Checklist will be added to your client



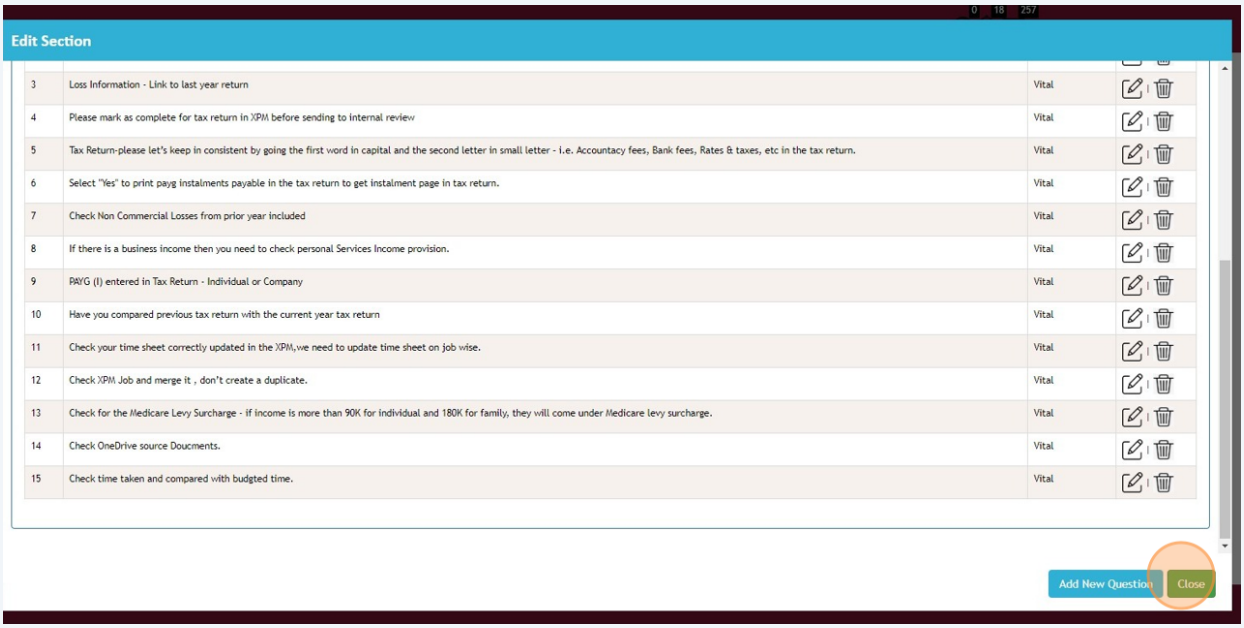
18 Click here>>> to Edit any questions required to personalize per client requirement.



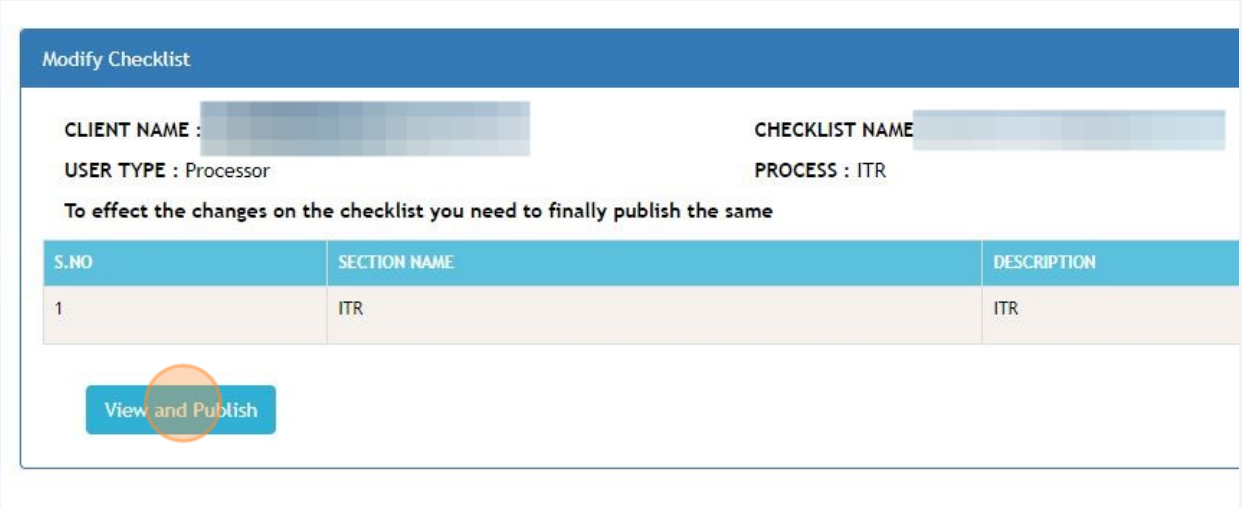
19 Click here to go into details of ITR Checklist.



20 You will be able to see all checkpoint here>> Add or delete any question as necessary for your client needs.>>> Once you are done with questions>>> Click Close.



21 After ensuring all questions are added to checklist >> Click" View and Publish"



22 Your Checklist is now ready for Team to use against all jobs.