



Manage Assessments

Overview

1. FirmAdmin dashboard
2. Editing and Deleting assessments

⚠ Note: Only a user in the FirmAdmin role has the rights to manage an assessment.

FirmAdmin Dashboard

Let's take a look at the actions that can be performed on the FirmAdmin dashboard screen in order to manage your assessments,

1. The FirmAdmin dashboard lists all the assessments that have been created so far, along with the details that were entered during the assessment creation such as Client Name, Year of assessment, Basis period dates etc.

AI.TaxAssist									
Clients									
Client Name	Year Of Assessment	Basis Period	Target Date	Preparer	Reviewer	Manager	Current Client Progress		
Anant Pte Ltd	2018	Sep 06, 2019 - Sep 06, 2019	Sept. 6, 2019	preparer1	reviewer1	manager1	Review Draft Tax Computation : 8/14		
Saba1 PTE Ltd	2019	Jan 01, 2018 - Dec 31, 2018	Sept. 6, 2019	preparer1	reviewer1	manager1	Review Draft Tax Computation : 8/14		
Saba1 PTE Ltd	2018	Jan 01, 2018 - Dec 31, 2018	Oct. 7, 2019	preparer1	reviewer1	manager1	Review Draft Tax Computation : 8/14		
Arpitha Test 1	2018	Nov 11, 2019 - Nov 11, 2019	Nov. 11, 2019	preparer1		manager1	Review Draft Tax Computation : 8/14		
Arpitha Test 2	2018	Nov 12, 2019 - Nov 12, 2019	Nov. 12, 2019	preparer1		manager1	Review Financials Received : 5/14		
Test Demo	2019	Jan 01, 2018 - Dec 31, 2018	Dec. 18, 2019	preparer1	reviewer1	manager1	Address OSIs/Ledger Requests if any : 7/14		
testdemo	2019	Jan 01, 2019 - Dec 31, 2019	Dec. 1, 2019	preparer1	reviewer1	manager1	Review Financials Received : 5/14		
Arpitha Test3	2019	Jan 06, 2020 - Jan 06, 2020	Jan. 6, 2020	preparer1	reviewer1	manager1	Review Financials Received : 5/14		
Sa Ltd	2020	Jan 01, 2019 - Dec 31, 2019	Jan. 13, 2020	preparer1	reviewer1	manager1	Review Draft Tax Computation : 8/14		

Filter

Client
.....

Year of Assessment
.....

Functional Currency
.....

Preparer
.....

Reviewer
.....

Manager
.....

Basis Period Start

?

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2. The dashboard also lists the stage in which the assessment is currently at, under Current Client Progress. To know more about the assessment stages, please read [Assessment Stages](#).

3. The assessments can also be filtered on a number of fields such as Client Name, Preparer user, Year of Assessment etc.

Editing and Deleting Assessments

❗ **Note:** Only a user in the FirmAdmin role has the rights to edit or delete away an assessment.

In order to edit or delete an assessment,

1. A user has to login with the FirmAdmin credentials
2. Click on the assessment you wish to edit or delete
3. To change the details of an assessment, click on the CHANGE button

AI.TaxAssist

 admin@admin.com

Tax Registration Number	W1349
Country Of Incorporation	Singapore
Address	street
Date Of Incorporation	Feb. 1, 2016
Functional Currency	SGD
Year End	Dec. 31
Primary Contact Name	maanasa
Primary Contact Email	maanasa@xion.ai
Secondary Contact Name	
Secondary Contact Email	maanasa@guardxinc.com
Status	ACTIVE
Year Of Assessment	2019
Basis Period Start	Jan. 1, 2018
Basis Period End	Dec. 31, 2018
Import Date	Feb. 13, 2020
Target Date	Sept. 30, 2018
Preparer	preparer2
Manager	manager1

DELETE

CHANGE

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4. This opens up the form with all the details of the assessment. Once the changes are made, click on SAVE.

Clients > Test Demo > Change

Client: Test Demo

test1

Client Name

Test Demo

Business Registration Number

BRTestDemo

Tax Registration Number

TRTestDemo

Country of Incorporation

Singapore

Address

234

Date of Incorporation

1964-12-30

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Note: Editing any fields in an assessment, after the Assigned stage, resets the assessment back to the Assigned stage.

5. In order to delete an assessment, click on the DELETE button

Country of Incorporation	Singapore
Address	234
Date Of Incorporation	Dec. 30, 1964
Functional Currency	SGD
Year End	Dec. 18
Primary Contact Name	1
Primary Contact Email	ss@xx.xom
Secondary Contact Name	
Secondary Contact Email	ee@ss.com
Status	ACTIVE
Year Of Assessment	2019
Basis Period Start	Jan. 1, 2018
Basis Period End	Dec. 31, 2018
Import Date	Dec. 18, 2019
Target Date	Dec. 18, 2019
Preparer	preparer1
Reviewer	reviewer1
Manager	manager1

DELETE

CHANGE

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6. This will open up a screen asking if you are sure about deleting the assessment and all the related items (such as documents, OSI entries and responses, Workspace entries etc.). If you are certain, click on YES, I'M SURE button at the bottom of the screen. This will delete away the assessment permanently.

Are you sure you want to delete the Test Demo and related items?

Clients

Test Demo

Documents

FA (2).xls, eStatement.pdf, MA (2).xls

Osis

OSI object (10)

Workspace Entrys

WorkspaceEntry object (167552), WorkspaceEntry object (167553), WorkspaceEntry object (167554), WorkspaceEntry object (167555), WorkspaceEntry object (167556), WorkspaceEntry object (167557), WorkspaceEntry object (167558), WorkspaceEntry object (167559), WorkspaceEntry object (167560), WorkspaceEntry object (167561), WorkspaceEntry object (167562), WorkspaceEntry object (167563), WorkspaceEntry object (167564), WorkspaceEntry object (167565), WorkspaceEntry object (167566), WorkspaceEntry object (167567), WorkspaceEntry object (167568), WorkspaceEntry object (167569), WorkspaceEntry object (167570), WorkspaceEntry object (167571), WorkspaceEntry object (167572), WorkspaceEntry object (167573), WorkspaceEntry object (167574), WorkspaceEntry object (167575), WorkspaceEntry object (167576), WorkspaceEntry object (167577), WorkspaceEntry object (167578), WorkspaceEntry object (167579), WorkspaceEntry object (167580), WorkspaceEntry object (167581), WorkspaceEntry object (167582), WorkspaceEntry object (167531), WorkspaceEntry object (167532), WorkspaceEntry object (167533), WorkspaceEntry object (167534), WorkspaceEntry object (167535), WorkspaceEntry object (167536), WorkspaceEntry object (167537), WorkspaceEntry object (167538), WorkspaceEntry object (167539), WorkspaceEntry object (167540), WorkspaceEntry object (167541), WorkspaceEntry object (167542), WorkspaceEntry object (167543), WorkspaceEntry object (167544), WorkspaceEntry object (167545), WorkspaceEntry object (167546), WorkspaceEntry object (167547), WorkspaceEntry object (167548), WorkspaceEntry object (167549), WorkspaceEntry object (167550), WorkspaceEntry object (167551)

Fixed Assets

 What's Next?

If you would like to know more about the different stages an assessment passes through, please read [Assessment Stages](#).