

# Setting up status update emails in Client Engager

7 Steps

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Created by

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Creation Date

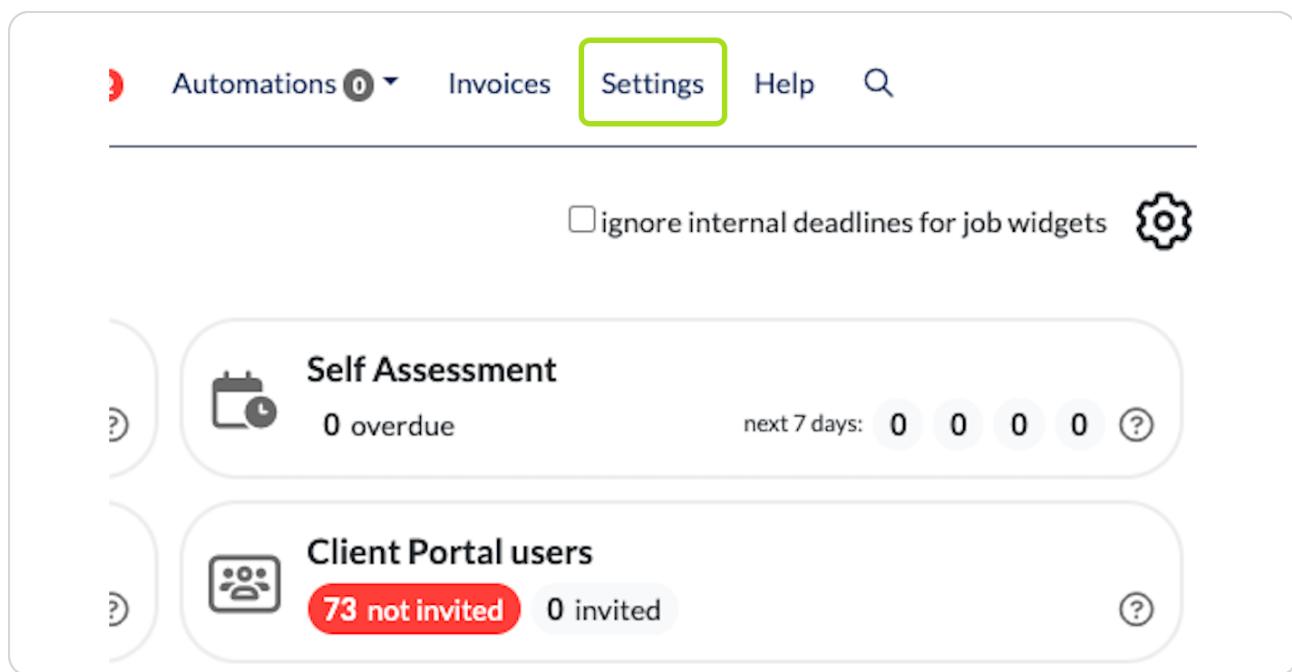
June 3, 2023

Last Updated

June 3, 2023

## STEP 1

### Click on Settings



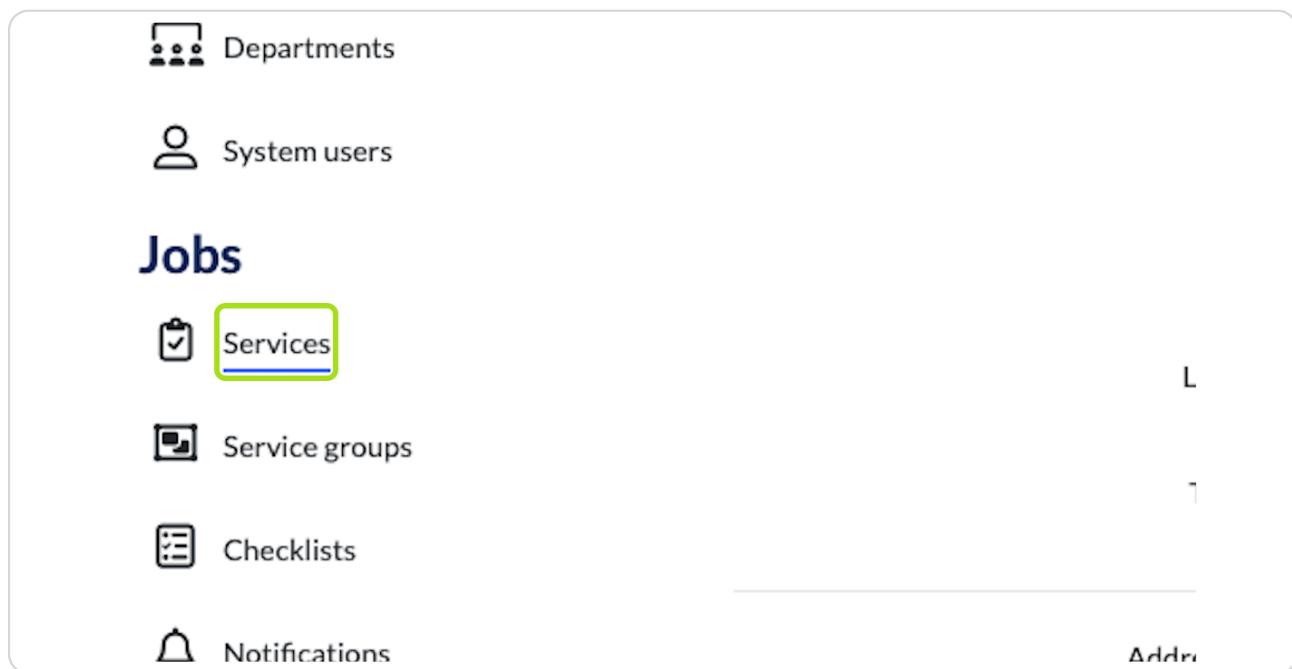
Automations 0 Invoices Settings Help  ignore internal deadlines for job widgets 

 **Self Assessment**  
0 overdue next 7 days: 0 0 0 0 

 **Client Portal users**  
**73 not invited** 0 invited 

## STEP 2

### **Click on Services**



 Departments

 System users

**Jobs**

 **Services**

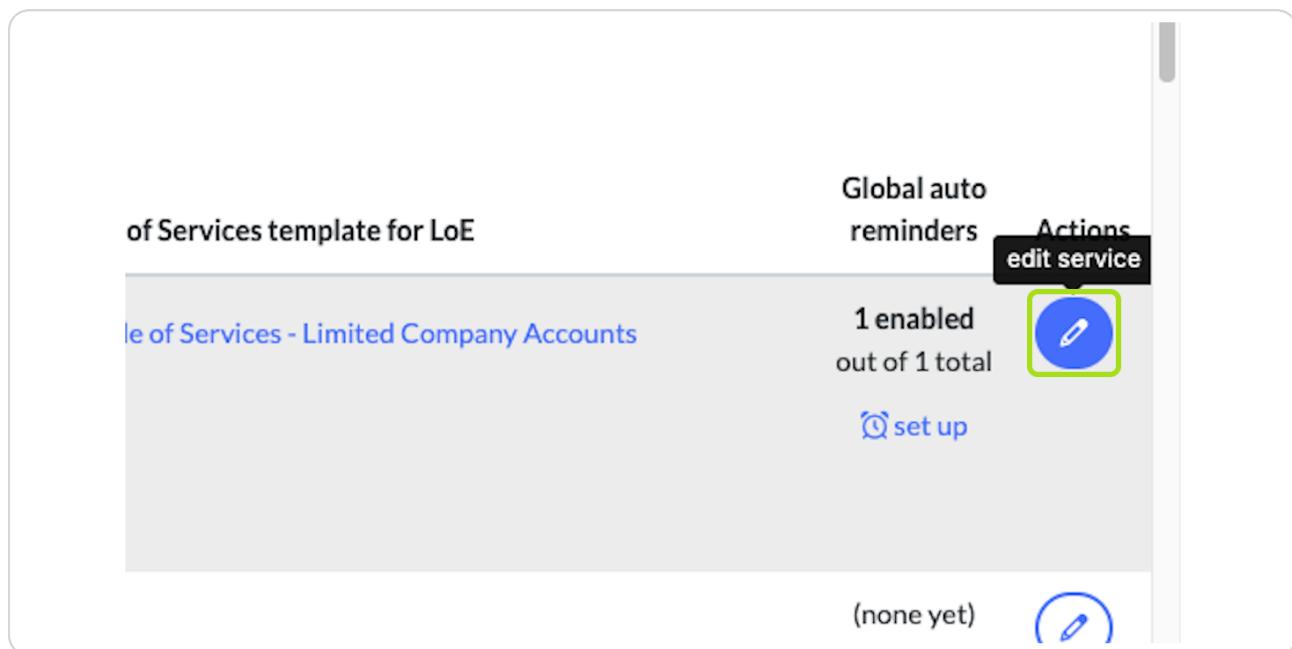
 Service groups

 Checklists

 Notifications 

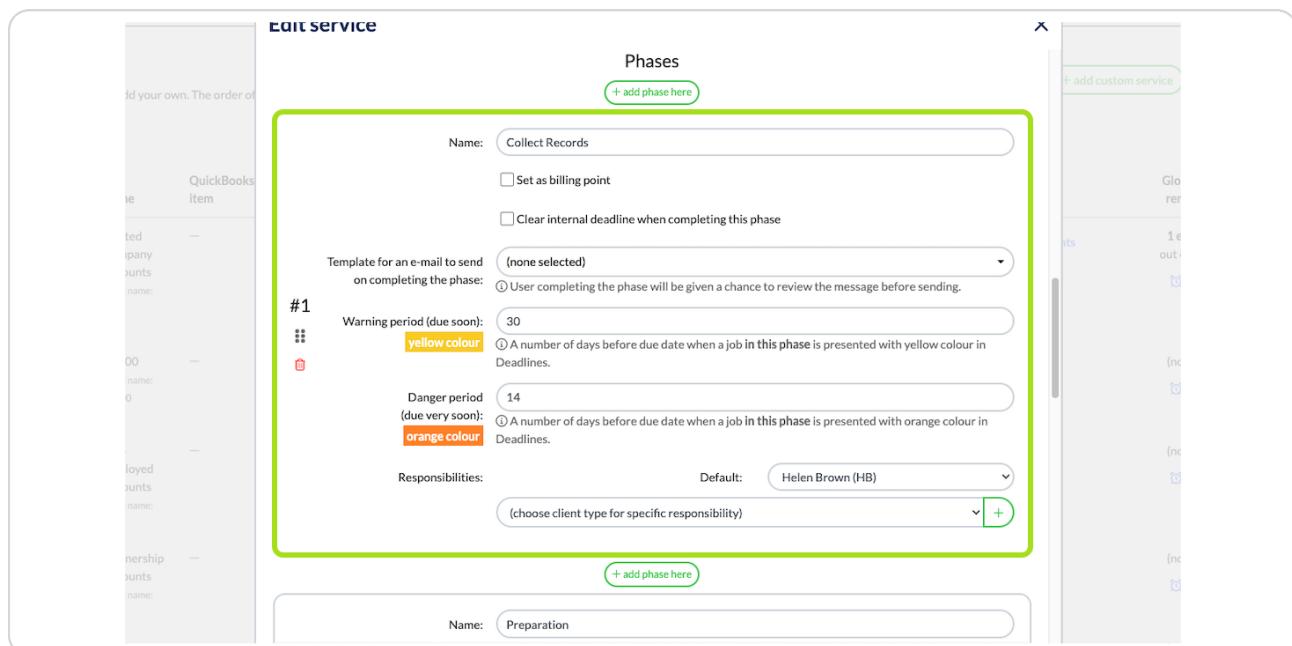
## STEP 3

Click on edit service for the service you want to add a status update email to



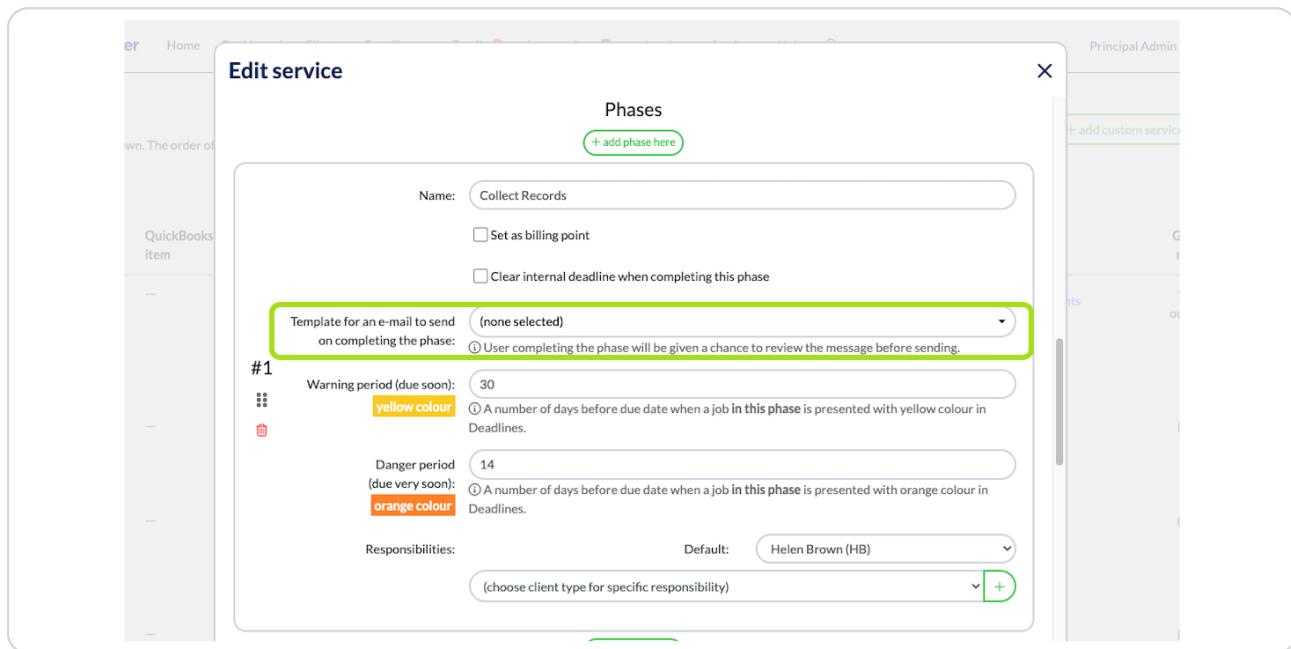
## STEP 4

Scroll down to the phase you want a status email to send from ONCE COMPLETED



## STEP 5

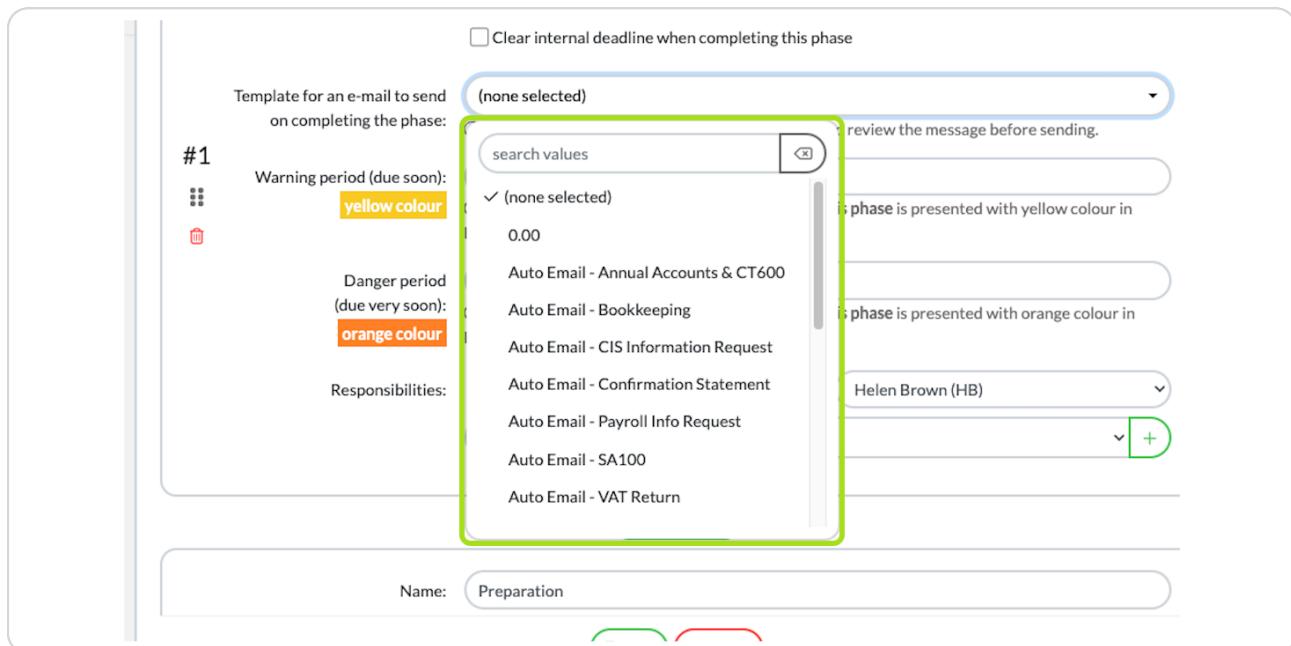
Click on Template for an e-mail to send on completing the phase



The screenshot shows the 'Edit service' interface with the 'Phases' section open. The 'Template for an e-mail to send on completing the phase:' dropdown is highlighted with a green border. The current selection is '(none selected)'. A tooltip below the dropdown explains: 'User completing the phase will be given a chance to review the message before sending.'

## STEP 6

and choose a template, you will have need to create this template email before this step so you can choose it from the drop down



The screenshot shows the 'Edit service' interface with the 'Phases' section open. The 'Template for an e-mail to send on completing the phase:' dropdown is open, showing a list of available templates. The list includes: (none selected), search values, ✓ (none selected), 0.00, Auto Email - Annual Accounts & CT600, Auto Email - Bookkeeping, Auto Email - CIS Information Request, Auto Email - Confirmation Statement, Auto Email - Payroll Info Request, Auto Email - SA100, and Auto Email - VAT Return. The dropdown is highlighted with a green border.

## STEP 7

### Click on Save

Responsibilities:	Auto Email - Confirmation Statement Auto Email - Payroll Info Request Auto Email - SA100 Auto Email - VAT Return	Helen Brow
Name: Preparation		
 A green button with a white 'Save' label and a red button with a white 'Cancel' label.		

# Tango

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