

Setting up status update emails in Client Engager

7 Steps [View most recent version on Tango.us](#) 

Created by

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Creation Date

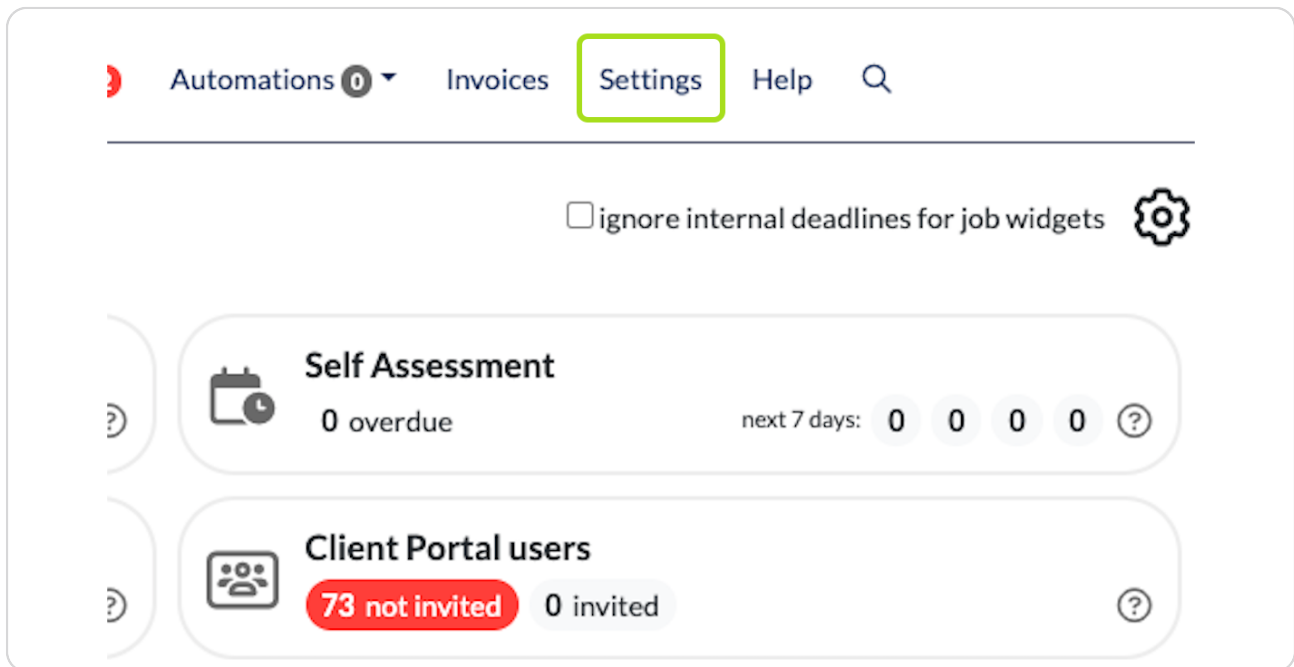
June 3, 2023

Last Updated

June 3, 2023

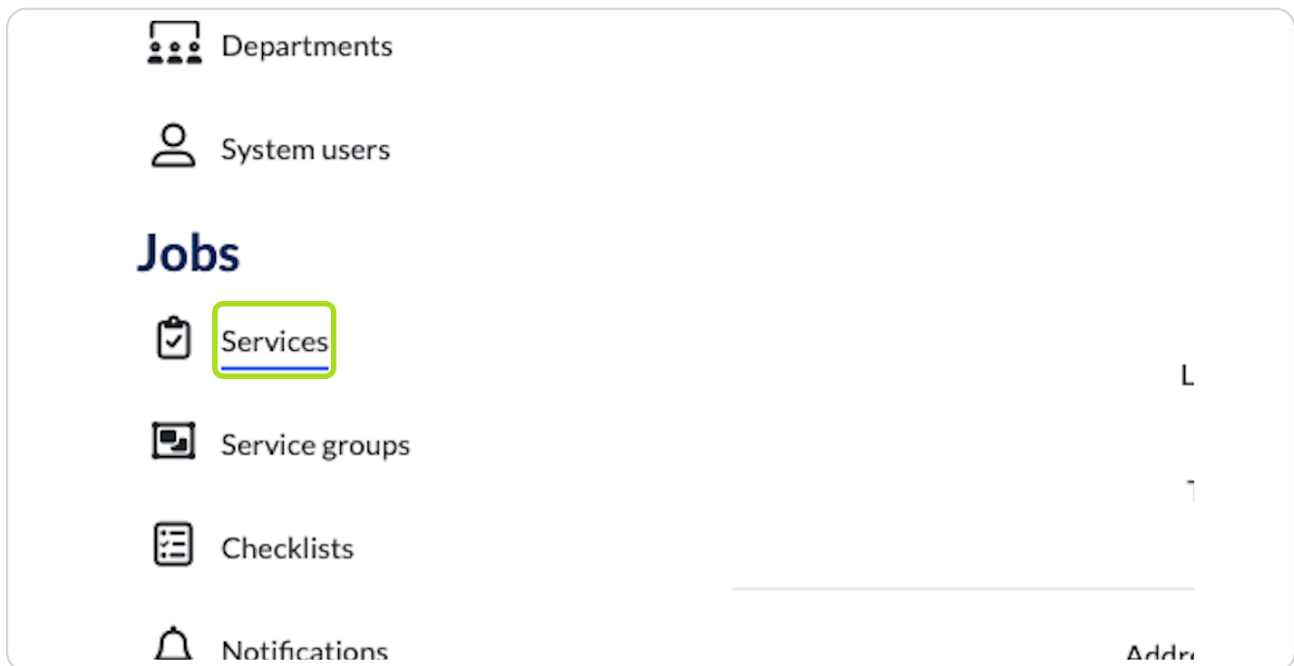
STEP 1

Click on Settings



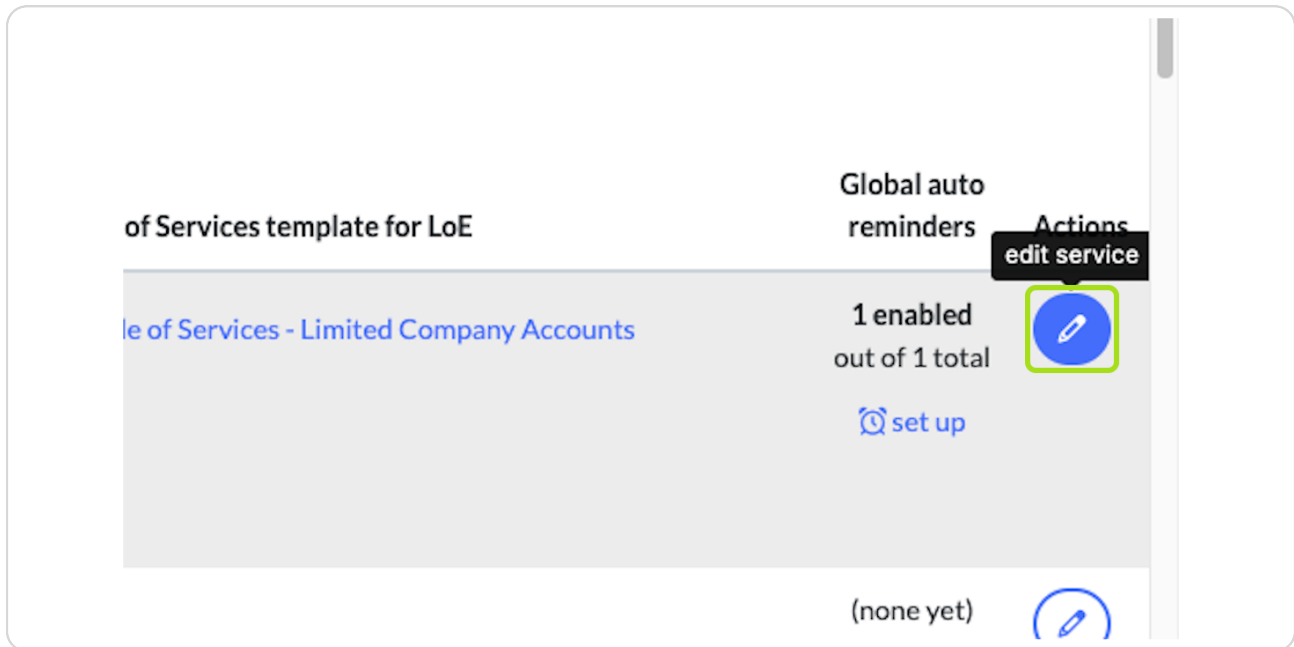
STEP 2

Click on Services



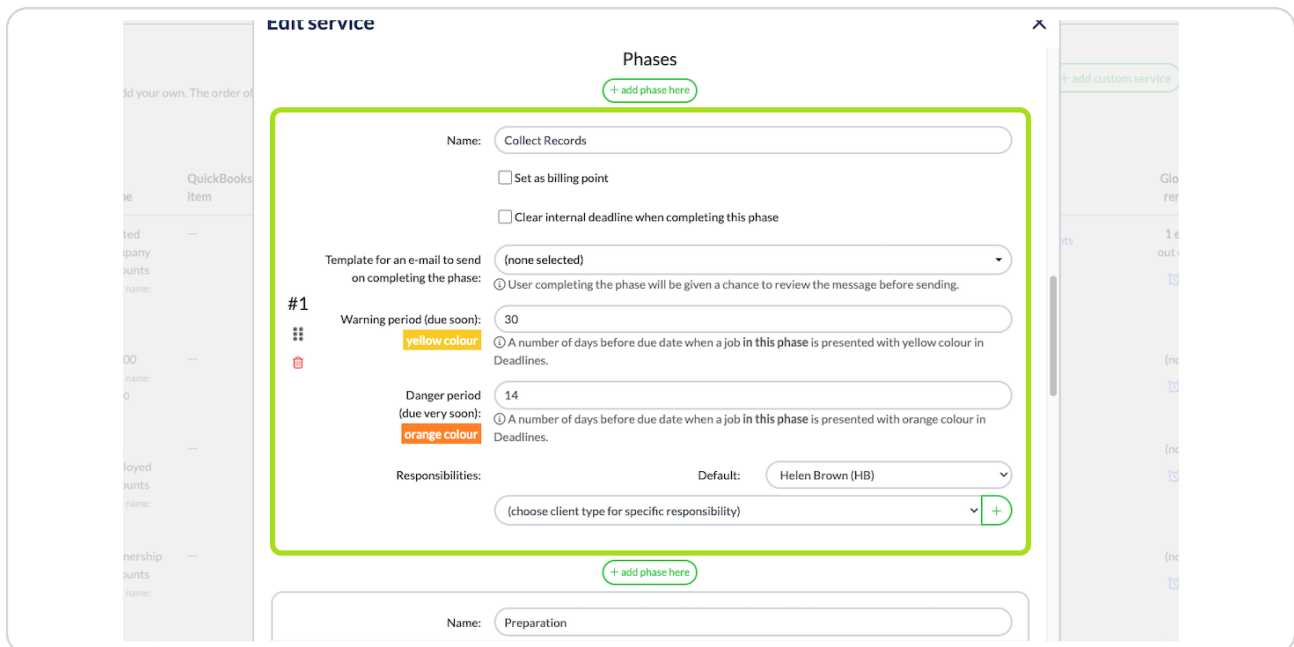
STEP 3

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

Edit service

Phases

+ add phase here

Name: Collect Records

☐ Set as billing point

☐ Clear internal deadline when completing this phase

Template for an e-mail to send on completing the phase: (none selected)

#1

Warning period (due soon): 30
yellow colour

Danger period (due very soon): 14
orange colour

Responsibilities: Default: Helen Brown (HB)

(choose client type for specific responsibility)

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

☐ Clear internal deadline when completing this phase

Template for an e-mail to send on completing the phase: (none selected)

#1

Warning period (due soon): yellow colour

Danger period (due very soon): orange colour

Responsibilities: Helen Brown (HB)

Name: Preparation

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
- Auto Email - VAT Return

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

Save

Cancel

Tango

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