

Automations Menu

From here you can see queued emails awaiting checking and sending, sent emails and failed emails.

The only time they should fail is if the email address is wrong

6 Steps [View most recent version](#) 

Created by

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Creation Date

June 3, 2023

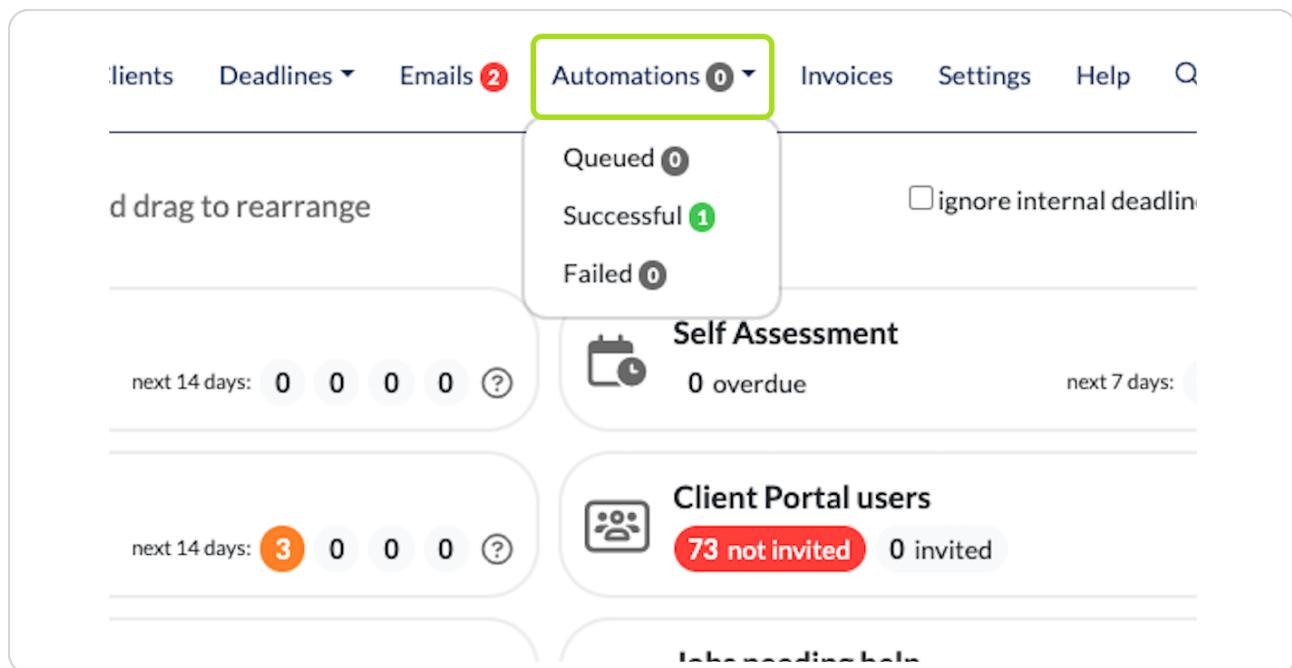
Last Updated

June 3, 2023



STEP 1

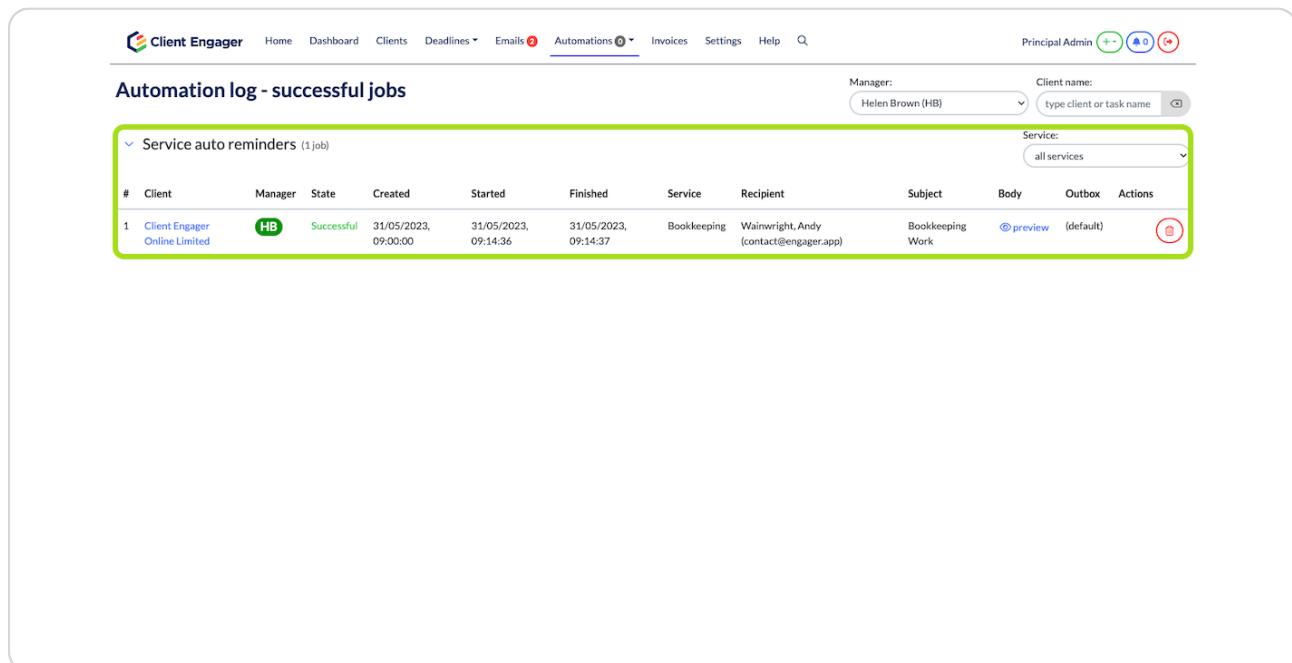
Click on Automations and choose the section you want to visit



The screenshot shows the Client Engager dashboard. At the top, there is a navigation bar with links for Clients, Deadlines, Emails (with a red notification badge of 2), Automations (with a red notification badge of 0), Invoices, Settings, Help, and a search bar. The Automations link is highlighted with a green box. A dropdown menu for Automations is open, showing three categories: Queued (0), Successful (1), and Failed (0). Below the dropdown, there is a section for 'Self Assessment' with a calendar icon and a message '0 overdue'. To the left, there is a section for 'Client Portal users' with a user icon and a message '73 not invited'. On the left side of the dashboard, there is a message 'd drag to rearrange' and a section for 'next 14 days' with a breakdown of 0, 0, 0, 0, and a question mark icon.

STEP 2

Here you can see the list of emails queued, sent or failed.

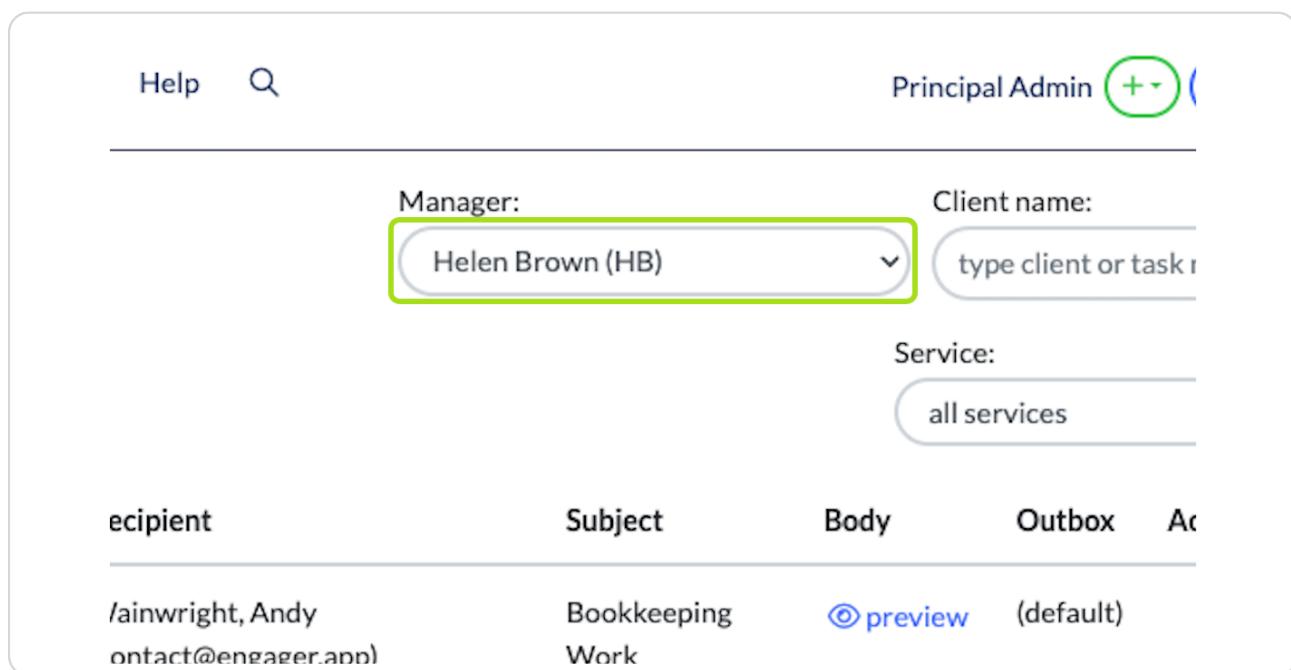


The screenshot shows the 'Automation log - successful jobs' page. At the top, there is a navigation bar with links for Home, Dashboard, Clients, Deadlines, Emails (with a red notification badge of 2), Automations (with a red notification badge of 0), Invoices, Settings, Help, and a search bar. The Automations link is underlined, indicating it is the active section. Below the navigation, there are filters for 'Manager' (set to 'Helen Brown (HB)') and 'Client name' (with a placeholder 'type client or task name'). A dropdown menu for 'Service' is open, showing 'all services'. The main table displays a single successful job: 'Service auto reminders' (1 job). The table columns are: #, Client, Manager, State, Created, Started, Finished, Service, Recipient, Subject, Body, Outbox, and Actions. The job details are: Client Engager Online Limited, Manager HB, State Successful, Created 31/05/2023, 09:00:00, Started 31/05/2023, 09:14:36, Finished 31/05/2023, 09:14:37, Service Bookkeeping, Recipient Wainwright, Andy (contact@engager.app), Subject Bookkeeping Work, Body @preview (default), and Outbox (empty). The 'Actions' column shows a red circular icon with a question mark.



STEP 3

You can filter by Manager



Help Principal Admin + -

Manager: Helen Brown (HB)

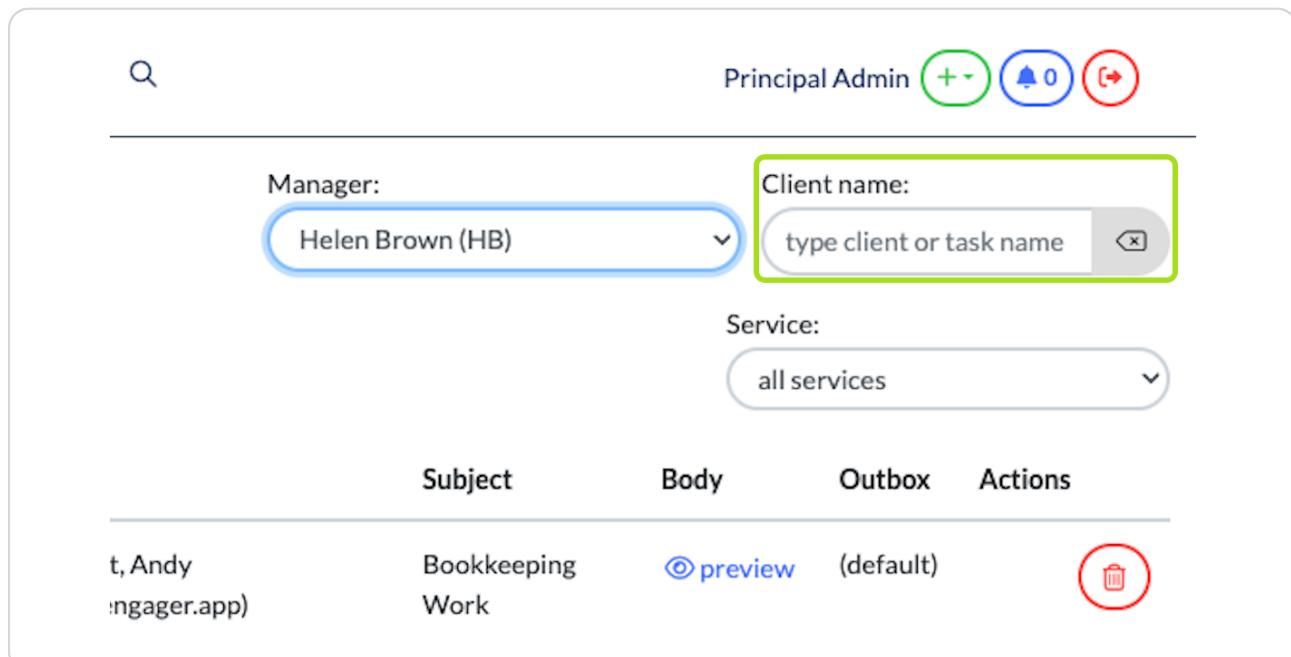
Client name: type client or task name

Service: all services

Recipient	Subject	Body	Outbox	Actions
lainwright, Andy ontact@engager.app)	Bookkeeping Work	@ preview	(default)	

STEP 4

Search by client name



Principal Admin + - 0 ⟳

Manager: Helen Brown (HB)

Client name: type client or task name

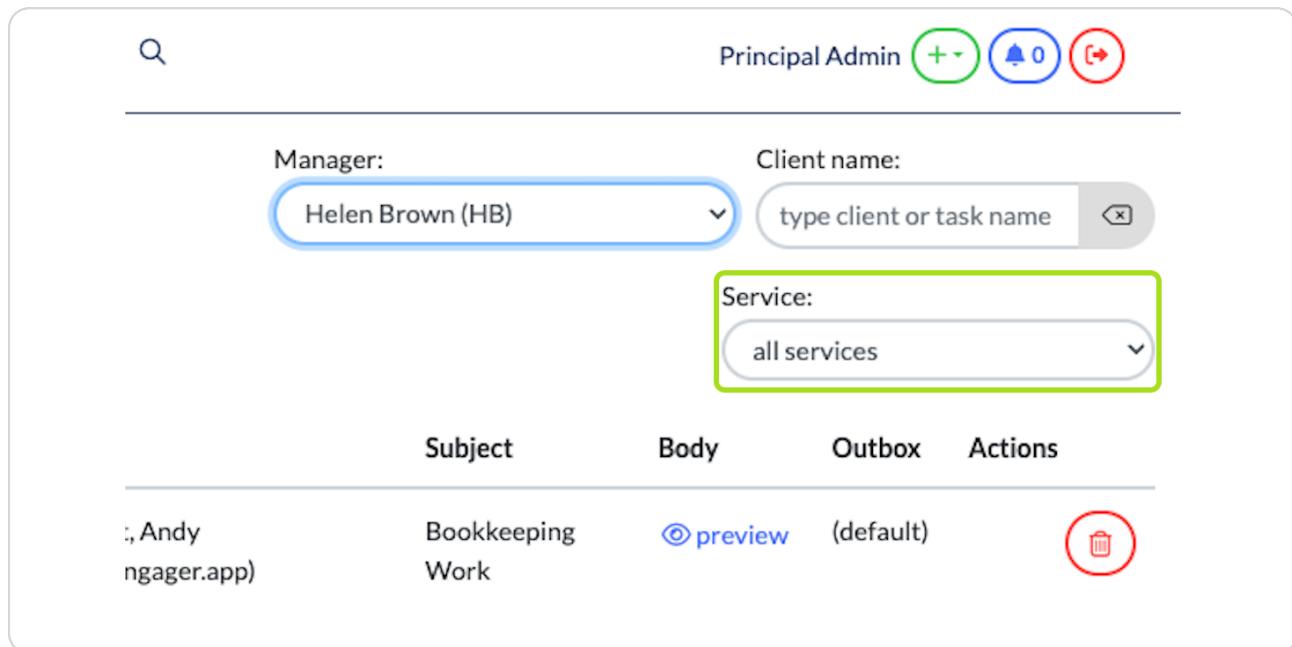
Service: all services

Recipient	Subject	Body	Outbox	Actions
lainwright, Andy ontact@engager.app)	Bookkeeping Work	@ preview	(default)	trash



STEP 5

You can filter by service



Principal Admin +
- Bell 0 ↻

Manager: Helen Brown (HB)

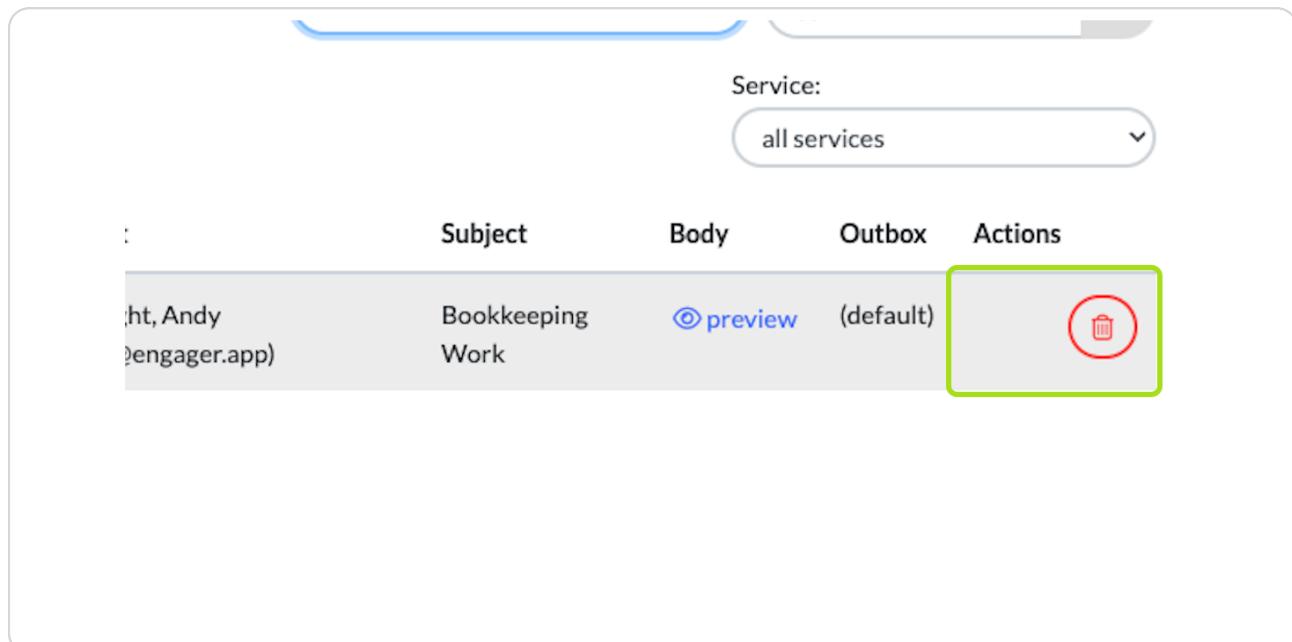
Client name: ✖

Service: all services

	Subject	Body	Outbox	Actions
: Andy ngager.app)	Bookkeeping Work	preview	(default)	trash

STEP 6

You can delete or if in queued and want to send there will be a green tick to press



Service: all services

	Subject	Body	Outbox	Actions
: Andy ngager.app)	Bookkeeping Work	preview	(default)	trash



