

Setting up Automated Emails for services

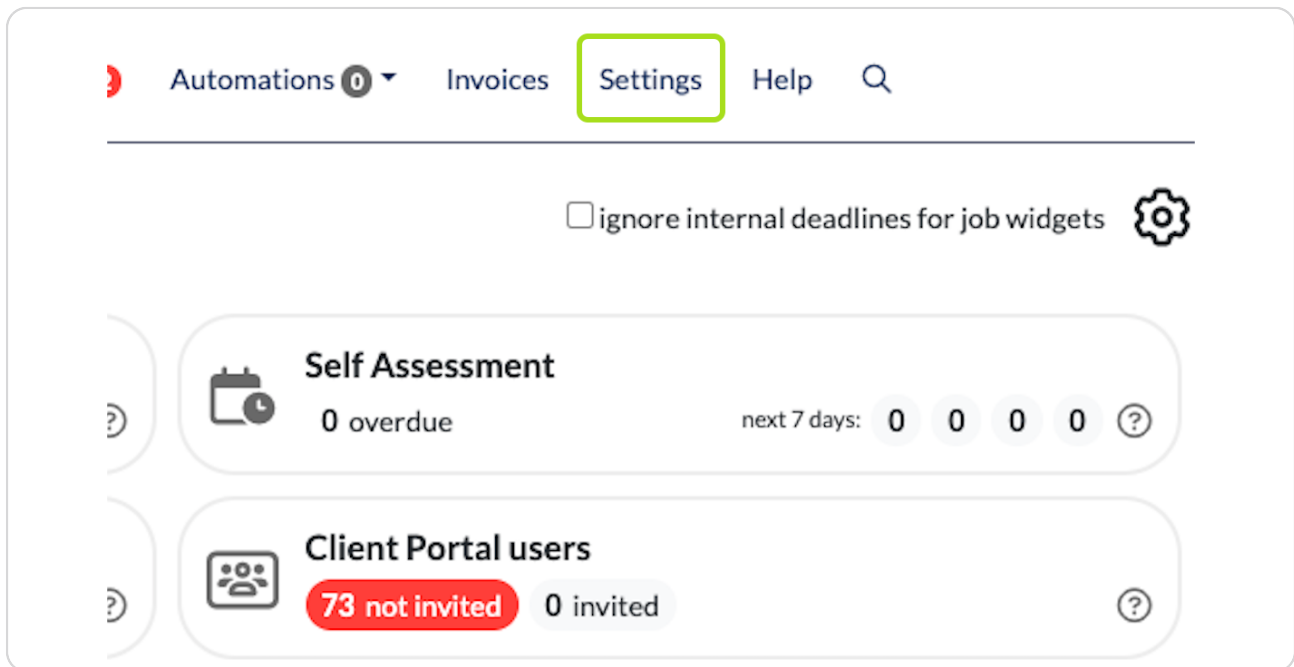
This is how to set up email automation at a Global level for all clients with a service turned on. You can then edit it to each client in the the tailored automation menu in each client

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

Created by	Creation Date	Last Updated
Johann Goree	June 3, 2023	June 3, 2023

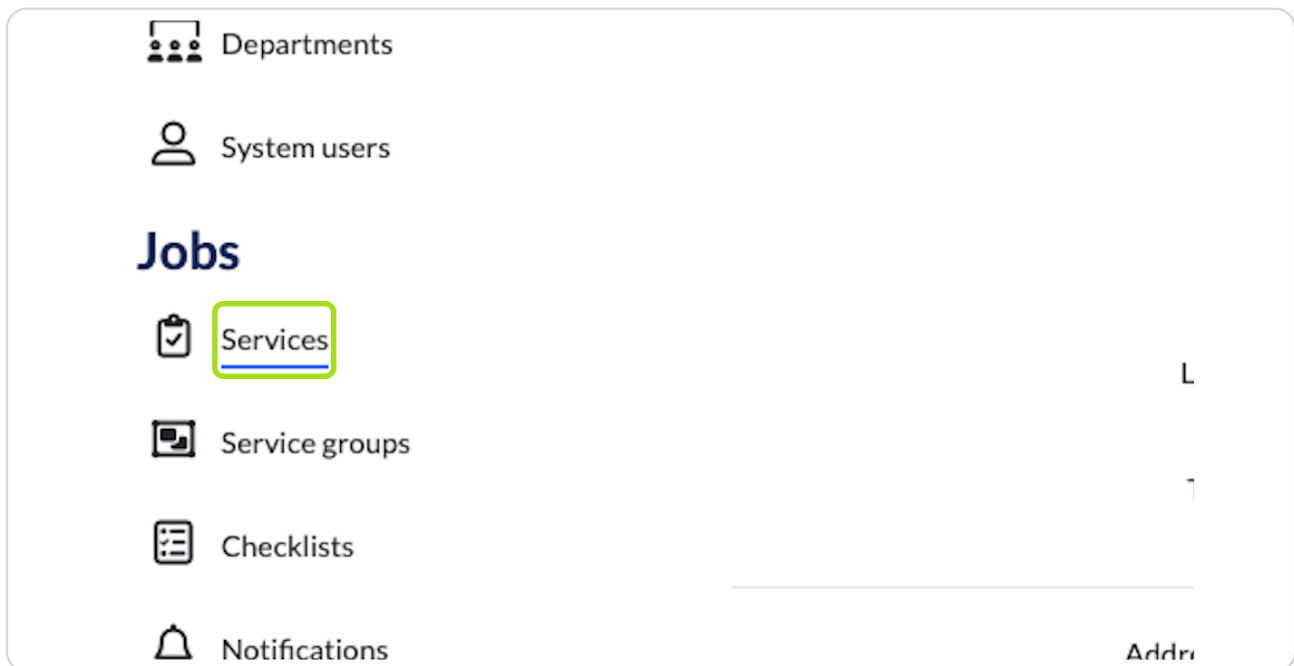
STEP 1

Click on Settings



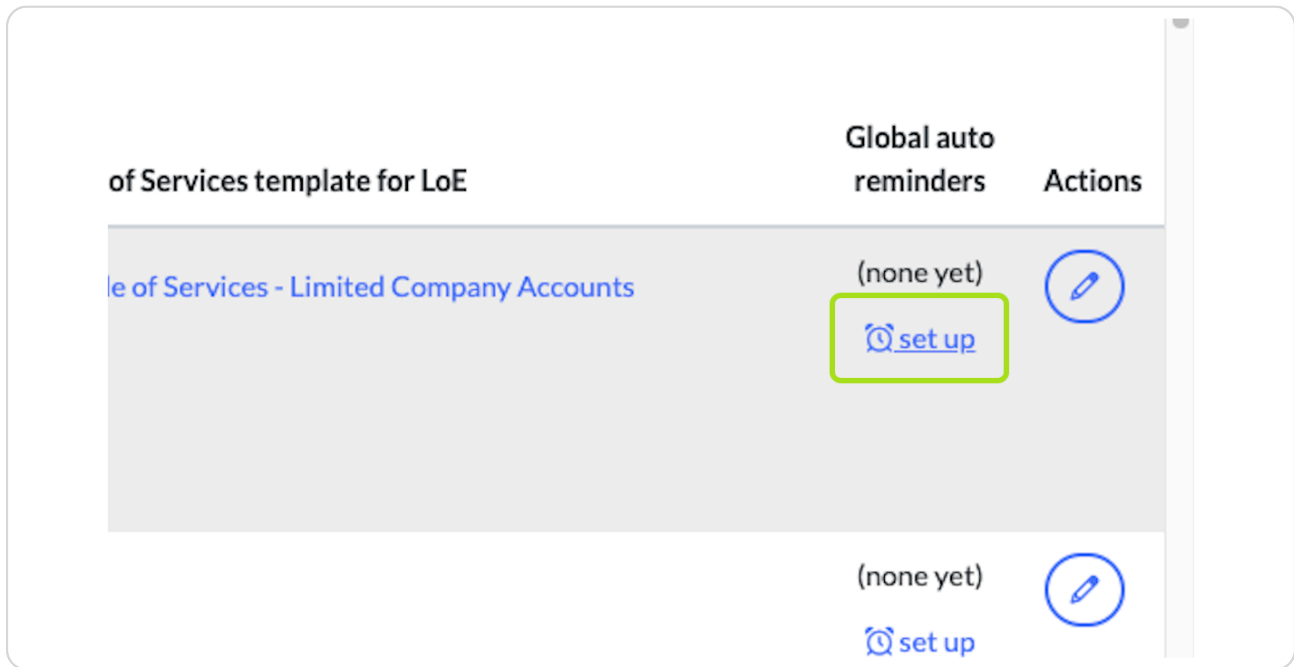
STEP 2

Click on Services



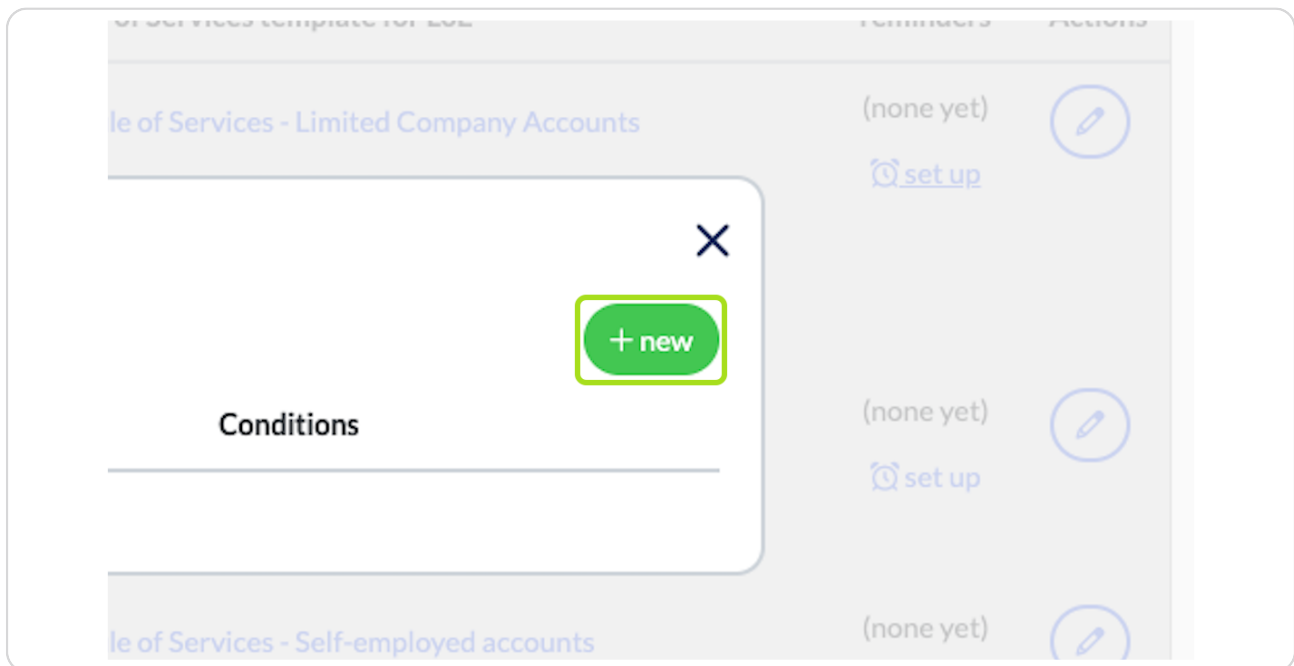
STEP 3

Click on **set up** on the service you want to add automated emails



STEP 4

Click on **new**



STEP 5

Complete the settings set up

Enabled - this turns the automation on or off

Queue - choose this if you want to check the emails before they send, turn this off if you are happy auto-sending the email with no checks

time - set a time for the automation to happen

The screenshot shows a 'Create auto reminder' dialog box with the following sections:

- Basic settings**
 - Enabled: ☒ yes ☐ no
 - Put in queue for review and confirmation before executing: ☒ yes ☐ no
 - Run at time (UK time, 24h format): 9 :00
 - Allow running on weekends: ☒ yes ☐ no (highlighted with a green border)
- What to do?**
 - Send an email from template: (choose template) ▼
 - to: ☒ all contacts ☐ primary contact only
 - using: default outbox ▼
- When to do it?**
 - 0 years + 0 months + 7 days before statutory deadline (next due date).
 - ☐ Repeat sending the email:
- Under which conditions?**
 - ⓘ All mandatory and selected optional conditions must be met for the automation to run.
 - Mandatory

STEP 6

Click on Send an email from template, you will need to have created the email template in settings before doing this so you can select it on the list

Create auto reminder

Basic settings

Enabled: ☒ yes ☐ no

Put in queue for review and confirmation before executing: ☒ yes ☐ no

Run at time (UK time, 24h format): 9 :00

Allow running on weekends: ☐ yes ☒ no

What to do?

Send an email from template: (choose template)

to: ☒ all contacts ☐ primary contact only

using: default outbox

When to do it?

0 years + 0 months + 7 days before statutory deadline (next due date).

☐ Repeat sending the email:

Under which conditions?

① All mandatory and selected optional conditions must be met for the automation to run.

Mandatory

STEP 7

Choose if it goes to all contact or primary contact. If you need to chose another contact then you can do this once the automation is set here by going into the specific client and tailoring it to that client,

Create auto reminder

Basic settings

Enabled: ☒ yes ☐ no

Put in queue for review and confirmation before executing: ☒ yes ☐ no

Run at time (UK time, 24h format): 9 :00

Allow running on weekends: ☐ yes ☒ no

What to do?

Send an email from template: (choose template)

to: ☒ all contacts ☐ primary contact only

using: default outbox

When to do it?

0 years + 0 months + 7 days before statutory deadline (next due date).

☐ Repeat sending the email:

Under which conditions?

① All mandatory and selected optional conditions must be met for the automation to run.

Mandatory

- Client is active.

STEP 8

Choose the outbox to use

Basic settings

Enabled: ☒ yes ☐ no

Put in queue for review and confirmation before executing: ☒ yes ☐ no

Run at time (UK time, 24h format): 9 :00

Allow running on weekends: ☒ yes ☐ no

What to do?

Send an email from template: (choose template)

to: **all contacts** primary contact only

using: default outbox

When to do it?

0 years + 0 months + 7 days before statutory deadline (next due date).

☐ Repeat sending the email:

Under which conditions?

① All mandatory and selected optional conditions must be met for the automation to run.

Mandatory

- Client is active.
- Client has required contact persons assigned to them.

STEP 9

Tell it when to do it

Run at time (UK time, 24h format): 9 :00

Allow running on weekends: ☒ yes ☐ no

What to do?

Send an email from template: (choose template)

to: **all contacts** primary contact only

using: default outbox

When to do it?

0 years + 0 months + 7 days before statutory deadline (next due date).

☐ Repeat sending the email:

Under which conditions?

① All mandatory and selected optional conditions must be met for the automation to run.

Mandatory

- Client is active.
- Client has required contact persons assigned to them.
- Each contact person has a name and an e-mail address.
- Service is enabled for the client and is not 'on hold'.
- Chosen template exists in the system.

Optional

☒ 'Record receive date' value is not set

STEP 10

If you want the email to repeat send until you tell it not to click repeat

Allow running on weekends: ☒ yes ☐ no

What to do?

Send an email from template: (choose template)

to: ☒ all contacts ☐ primary contact only

using:

When to do it?

0 years + 0 months + 7 days before statutory deadline (next due date).

☐ Repeat sending the email:

Under which conditions?

① All mandatory and selected optional conditions must be met for the automation to run.

Mandatory

- Client is active.
- Client has required contact persons assigned to them.
- Each contact person has a name and an e-mail address.
- Service is enabled for the client and is not 'on hold'.
- Chosen template exists in the system.

Optional

☒ 'Record receive date' value

☐ Job status

STEP 11

Tell it how often to repeat it and until when

What to do?

Send an email from template: (choose template)

to: ☒ all contacts ☐ primary contact only

using:

When to do it?

0 years + 0 months + 7 days before statutory deadline (next due date).

☒ Repeat sending the email:

every: 0 years + 0 months + 2 days

until: 0 years + 0 months + 0 days

before

Under which conditions?

① All mandatory and selected optional conditions must be met for the automation to run.

Mandatory

- Client is active.
- Client has required contact persons assigned to them.
- Each contact person has a name and an e-mail address.
- Service is enabled for the client and is not 'on hold'.
- Chosen template exists in the system.

Optional

STEP 12

Confirm what conditions have to be met to send the automation

When to do it?

0 years + 0 months + 7 days before statutory deadline (next due date).

☒ Repeat sending the email:

every: 0 years + 0 months + 2 days

until: 0 years + 0 months + 0 days

before statutory deadline (next due date).

Under which conditions?

ⓘ All mandatory and selected optional conditions must be met for the automation to run.

Mandatory

- Client is active.
- Client has required contact persons assigned to them.
- Each contact person has a name and an e-mail address.
- Service is enabled for the client and is not 'on hold'.
- Chosen template exists in the system.

Optional

☒ 'Record receive date' value is not set

☐ Job status

STEP 13

you can choose to determine if the email will send based on job status

Optional

☒ 'Record receive date' value is not s

☒ Job status is one of the fo

STEP 14

Click on Job status...

When to do it?

0 years + 0 months + 7 days before statutory deadline (next due date).

☒ Repeat sending the email:

every: 0 years + 0 months + 2 days

until: 0 years + 0 months + 0 days

before statutory deadline (next due date).

Under which conditions?

ⓘ All mandatory and selected optional conditions must be met for the automation to run.

Mandatory

- Client is active.
- Client has required contact persons assigned to them.
- Each contact person has a name and an e-mail address.
- Service is enabled for the client and is not 'on hold'.
- Chosen template exists in the system.

Optional

☒ 'Record receive date' value is not set

☒ Job status is one of the following: ☐ Request records ☐ Awaiting records ☐ Part records received

☐ Records received ☐ In progress ☐ Help needed

STEP 15

Click on Save

has a name and an e-mail address.

r the client and is not 'on hold'.

sts in the system.

value is not set

✓ one of the following: ☐ Request records ☐ Awaiting records ☐ Part rec

☐ Records received ☐ In progress ☐ Help ne

STEP 16

You can review the automation and add more to the service from here

and add your own. The order of services in this list is reflected in other places, including client form, dropdowns, etc. To reorder services, drag the handle in the

☐ show disabled services

+ add custom service

Name	QuickBooks item	Availability	Frequency	Default fee period	MTD required	Agent auth required	Checklist enabled	Phases	Schedule of Services template for LoE	Global auto reminders
Limited Company Accounts										(none yet)
Short name: A/Cs										set up
CT600										(none yet)
Short name: CT600										set up
Self-employed Accounts										(none yet)
Short name: A/Cs										set up
Partnership Accounts										(none yet)
Short name: A/Cs										set up
UK Property Accounts										(none yet)
										set up

Auto reminders for Limited Company Accounts

×

Current global auto reminders

+ new

Enabled	Use queue	Run time	Trigger	Email template	Recipients	Conditions
✓ yes	✓ yes	9:00	→ Run 7 days before due date. 🔄 Repeat every 2 days - stopping on due date.		From default outbox To primary contact	<ul style="list-style-type: none">Record receive date is not providedJob is in one of statuses:

Tango

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