

# Looking at the Deadline Card

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## STEP 1

### Click on the deadline your working on

The screenshot shows the 'Deadlines' dashboard in Client Engager. At the top, there are navigation links: Home, Dashboard, Clients, Deadlines (active), Emails, Automations, Invoices, Settings, and Help. A search bar and user profile (Principal Admin) are on the right. Below the navigation is a filter bar with options like 'Auto-refresh in: 4:37. Click to disable', 'refresh now', 'ignore internal deadlines', 'Group by: staff member', 'Card layout', 'switch to list', 'export', and 'create task'. The main area is a grid of task cards for staff members: Principal Admin (1 Work Item / £0), Helen Brown (7 Work Items / £915), Steve Jones (9 Work Items / £570), Jackie Smith (8 Work Items / £315), and Andy Williamson (2 Work Items / £50). Each card lists tasks with their status (e.g., '3 days ago', 'In 4 days', 'Statutory') and a manager name (e.g., PA, SJ, JS, AW).

## STEP 2

Awaiting records – this is the "status" Area so you can mark where in the deadline you are up to.

The screenshot shows a detailed view of a deadline for 'Client Engager Online Limited' under the category 'Limited Company Accounts'. The main heading is 'Client Engager Online Limited'. Below it, there is a status indicator 'Awaiting records' highlighted with a green box, and a 'compose text' button. The 'Remarks' field is empty. The 'Manager' is listed as 'HB'. The 'Period end' is '31/03/2023'. The 'Records received' is shown as a dash. The 'Checklist' is marked as '100%' with a green checkmark icon. The 'Fee' is '£795 annually'. There is a 'Notes' field at the bottom.

### STEP 3

Here you can send texts, emails, put a job on hold if it cant move forward for any reason and mark the whole job complete.

The screenshot shows a software interface for 'r Online Limited'. At the top, there are four buttons: 'compose text', '@ compose e-mail', 'I put on hold', and 'complete job'. Below these, there are fields for 'Period end' (31/03/2023), 'Records received' (—), 'Internal deadline' (—), and 'Statutory deadline' (31/07/2023 in 1+ month). The 'Fee' is listed as £795 annually. A 'Notes' field is present but empty. At the bottom, there are 'previous' and 'complete current' buttons. The interface also shows a sidebar with 'Principal Admin' and 'Statutory' labels.

### STEP 4

Manager this is the person that manages the client

The screenshot shows a software interface with a task card titled 'Awaiting records'. The card includes a 'Remarks' field (empty), a 'Manager' field (highlighted in green) with the value 'HB', and a 'Period end' field (31/03/2023). Below the manager field, there is a 'Checklist' section with a green checkmark and '100%' completion, and a 'Fee' section with '£795 annually'. A 'Notes' field is also present but empty. The interface also shows a sidebar with 'Principal Admin' and 'Task' labels.

## STEP 5

Period end this pulls through from companies house or based on known things like Tax year, VAT Period etc

Awaiting records

compose text

Remarks:  
—

Task  
PA  
Manager: HB

Period end: 31/03/2023

Records received: —

Checklist: 100%  
✓

Fee: £795 annually

Notes:

## STEP 6

Records received - here you can set the date you received the records from your client by click on the area below with the line in

Awaiting records

compose text @ compose e-mail put on f

Period end: 31/03/2023

Records received: —

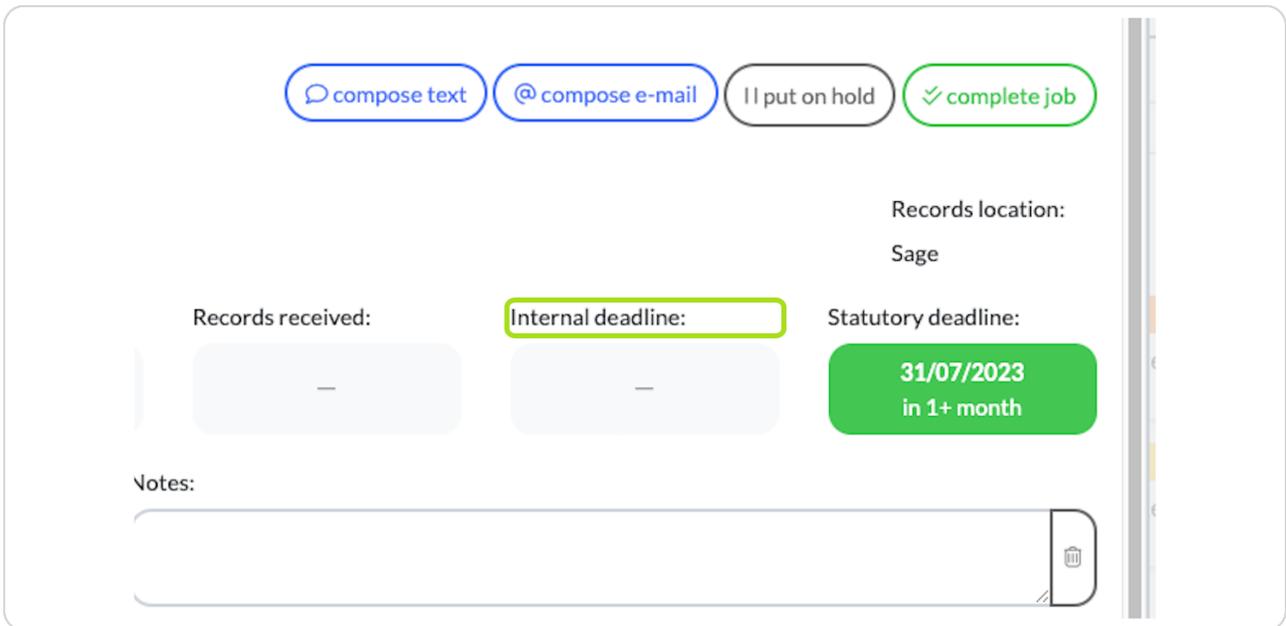
Internal deadline: —

Fee: £795 annually

Notes:

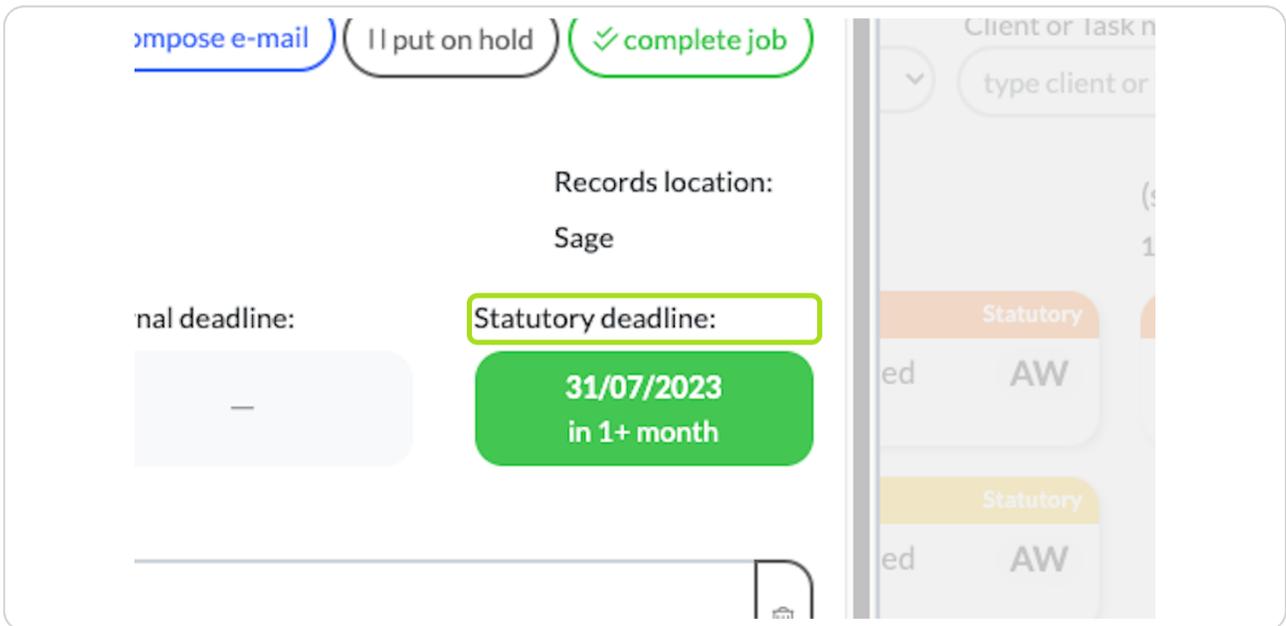
STEP 7

Internal deadline - you may wish to prioritise this work before the statutory deadline, by setting an internal deadline the system will use this as the deadline instead



STEP 8

Statutory deadline - this is based on the service deadline set in the settings



## STEP 9

Notes - here you can add notes to the job, they auto save!

The screenshot shows a software interface for Step 9. At the top, there are buttons for 'compose text', 'compose e-mail', 'put on hold', and 'complete job'. Below these, the 'Records location' is set to 'Sage'. The 'Period end' is 31/03/2023, 'Records received' is '-', and 'Internal deadline' is '-'. The 'Statutory deadline' is 31/07/2023 in 1+ month. The 'Fee' is £795 annually. A 'Notes' field is highlighted with a green border. Below the notes field are buttons for '<< previous' and 'complete current'. A list of users and their completion status is shown: PJ (Completed: 21/04/2023 10:23), HB (not completed), SJ (not completed), and HB (not completed).

## STEP 10

Phases - here you can complete a phase or go back a phase if required

The screenshot shows a software interface for Step 10. At the top, there are buttons for 'compose text', 'compose e-mail', 'put on hold', and 'complete job'. Below these, the 'Records location' is set to 'Sage'. The 'Period end' is 31/03/2023, 'Records received' is '-', and 'Internal deadline' is '-'. The 'Statutory deadline' is 31/07/2023 in 1+ month. The 'Fee' is £795 annually. A 'Notes' field is present. A 'Phases' section is highlighted with a green border, showing a progress bar with four phases: 'Collect Records' (completed), 'Preparation' (not completed), 'Approval' (not completed), and 'Filing' (not completed). Below the phases are buttons for '<< previous' and 'complete current'. A list of users and their completion status is shown: PJ (Completed: 21/04/2023 10:23), HB (not completed), SJ (not completed), and HB (not completed). At the bottom, there are buttons for '+ raise' and 'link existing'.

## STEP 11

Each phases shows user responsible and status i.e. complete and when or not complete

The screenshot displays a task management interface with the following details:

- Remarks:** —
- Records location:** Sage
- Manager:** HB
- Period end:** 31/03/2023
- Records received:** —
- Internal deadline:** —
- Statutory deadline:** 31/07/2023 in 1+ month
- Checklist:** 100% (with a green checkmark icon)
- Fee:** £795 annually
- Notes:** (empty text area)
- Phases:**
  - Collect Records: Completed: 21/04/2023 10:23 (User: PJ)
  - Preparation: not completed (User: HB)
  - Approval: not completed (User: SJ)
  - Filing: not completed (User: HB)
- Invoice:** (no invoice linked)
- Buttons:** + raise, link existing
- Navigation:** << previous, ✓ complete current
- Right Sidebar:** Statutory AW (twice)

## STEP 12

The bank note indicates when you complete this phase the system will remind you to invoice the client. If an envelope icon is shown it means when this phase is completed the system will ask if you want to send a status update email to the client

Remarks: —

Records location: Sage

Manager: HB

Period end: 31/03/2023

Records received: —

Internal deadline: —

Statutory deadline: 31/07/2023 in 1+ month

Checklist: 100%

Fee: £795 annually

Notes:

Phases

- Collect Records Completed: 21/04/2023 10:23
- Preparation** not completed
- Approval not completed
- Filing not completed

[Invoice](#) [Audit trail](#)

Invoice (no invoice linked) [+ raise](#) [link existing](#)

### STEP 13

Invoice here you raise an invoice if required and linked to a bookkeeping solution such as QBO

Checklist: 100%  
fee: £795 annually  
notes:

Phases

- Collect Records
- Preparation**
- Approval
- Filing

Invoice

(no invoice linked)

### STEP 14

Audit trail - here you can see who has done what and when for this task

<< previous    ✓ complete current

PJ	Completed: 21/04/2023 10:23
HB	not completed
SJ	not completed
HB	not completed

Audit trail

+ raise    @ link existing

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