

How to view deadlines in Client Engager

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

Created by

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Creation Date

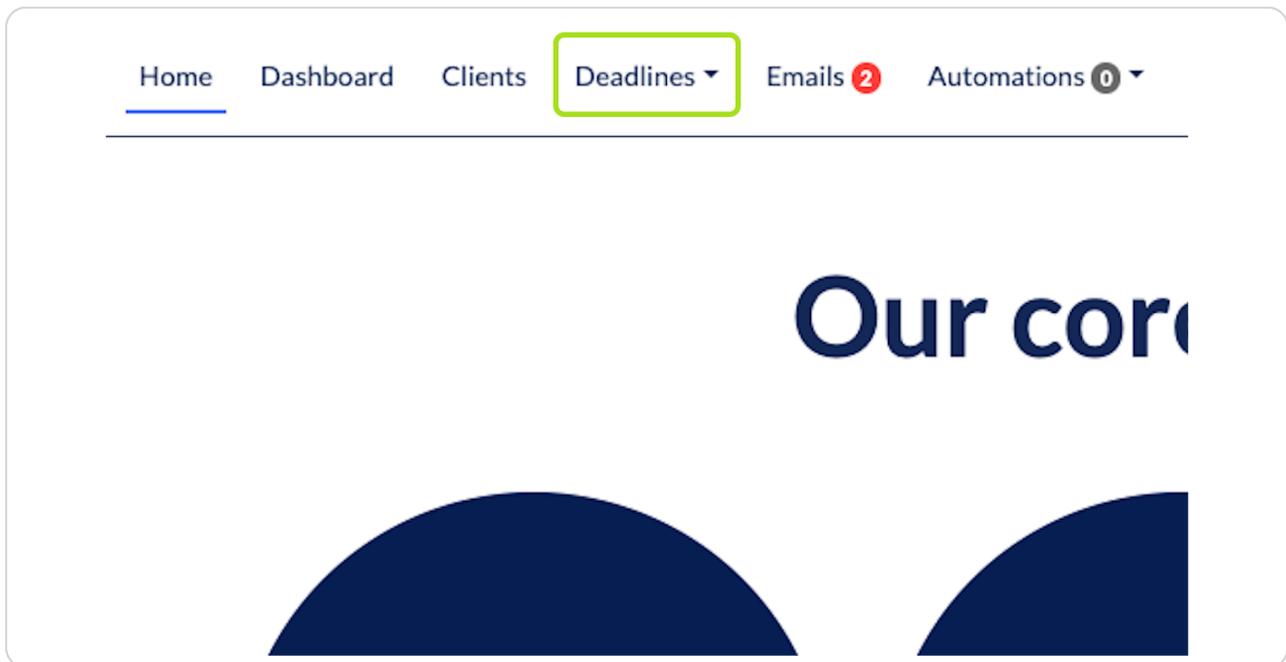
June 3, 2023

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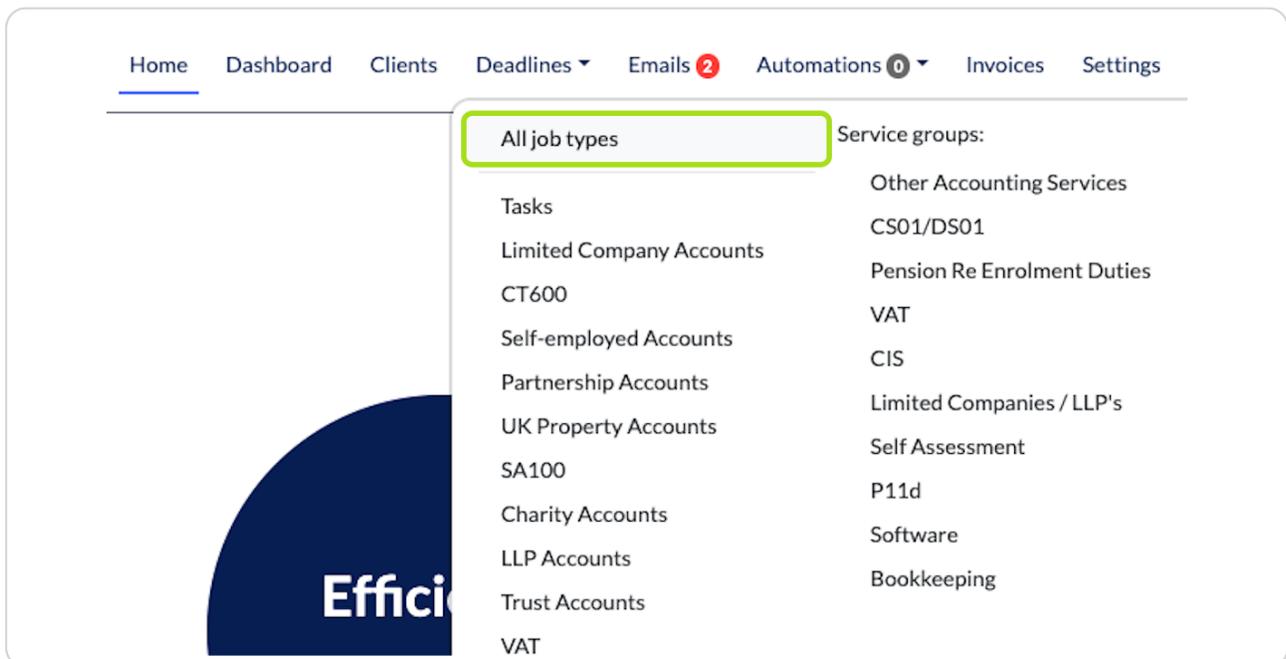
STEP 1

Click on Deadlines



STEP 2

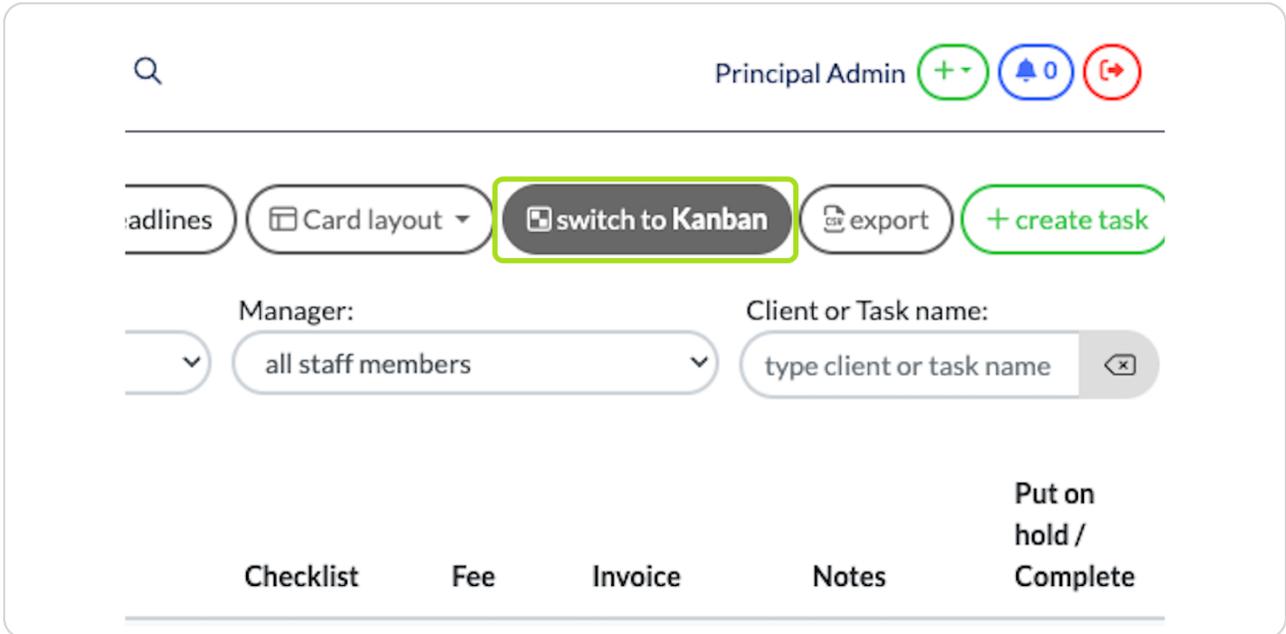
Click on All job types or a specific service your interested in



STEP 3

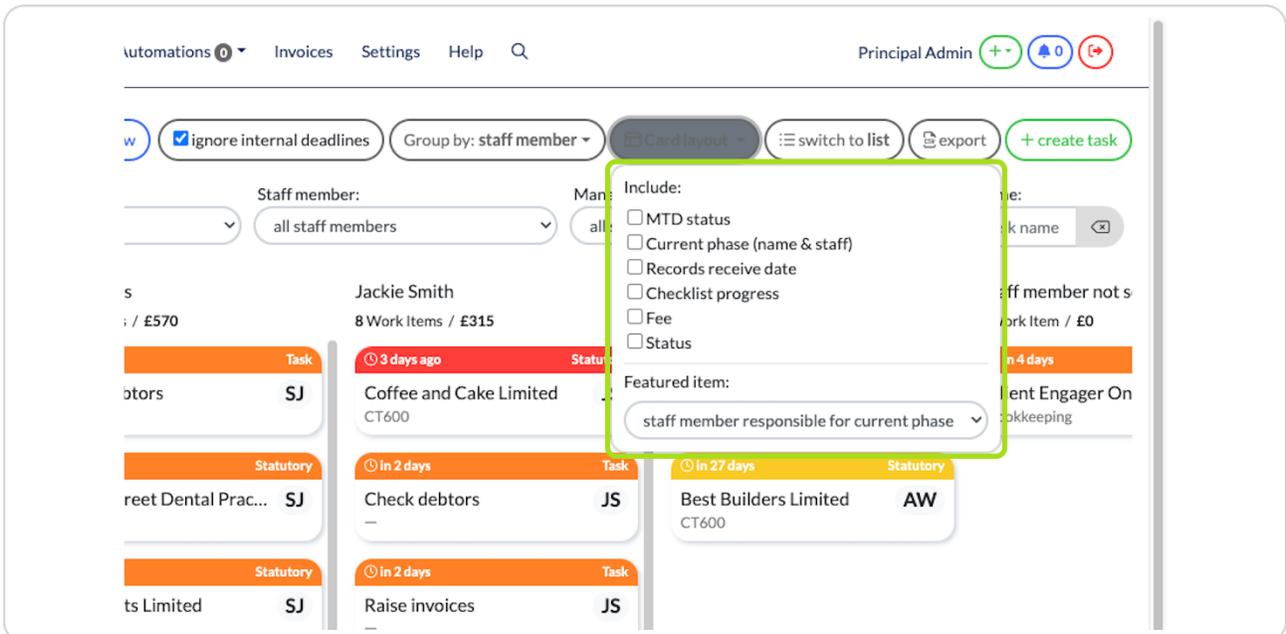
You can choose Kanban or list view.

List view just lists all deadlines in date order, kanban is far more powerful



STEP 4

In kanban view you can select what info is displayed on the cards



STEP 5

You can group information by various options including staff member, job type, status, week and due period

The screenshot shows a dashboard interface with a navigation bar at the top containing 'Emails 2', 'Automations 0', 'Invoices', 'Settings', and 'Help'. Below the navigation bar, there are several filters and controls: 'refresh now', 'ignore internal deadlines' (checked), 'Group by: staff member' (highlighted with a green box), 'Card layout', 'switch to list', and 'exp'. The main content area displays a grid of task cards for three staff members: Steve Jones (9 Work Items / £570), Jack (8 Work Items / £570), and Andy Williamson (2 Work Items / £50). Each card shows a task name, a due date (e.g., 'in 2 days'), and a status (e.g., 'Task', 'Statutory'). The 'Group by' dropdown menu is open, showing options: staff member, department, job type, status, week, due period, and due state.

STEP 6

To help prioritise work we have colour coded cards, red - overdue, amber due very soon, yellow due soon and green is okay. we also show how many days due on the card

The screenshot shows a dashboard interface with a navigation bar at the top containing 'Auto-refresh in: 4:38. Click to disable', 'refresh now', and 'ignore internal'. Below the navigation bar, there are several filters and controls: 'state: overdue / Due very soon / Due soon / OK', 'Days forward: 60', 'Job types: all job types', 'Status: any', and 'St'. The main content area displays a grid of task cards for three staff members: Principal Admin (1 Work Item / £0), Helen Brown (7 Work Items / £915), and Steve Jones (9 Work Items / £570). Each card shows a task name, a due date (e.g., 'in 4 days', 'in 2 days', 'in 1+ month'), and a status (e.g., 'Task', 'Statutory'). The cards are color-coded: red for overdue, amber for due very soon, yellow for due soon, and green for okay. The 'in 4 days' card for Helen Brown is highlighted with a green box.

STEP 7

you can search by client or task or use the filters next to search to display info required

The screenshot shows a user interface for managing staff members. At the top right, it says "Principal Admin" with three icons: a green plus-minus, a blue bell with "0", and a red refresh. Below this is a search bar with a magnifying glass icon. A horizontal menu contains several buttons: "Staff member" (dropdown), "Card layout" (dropdown), "switch to list" (icon), "export" (icon), and "+ create task" (green button). Below the menu are two search filters: "Manager:" with a dropdown set to "all staff members", and "Client or Task name:" with a text input field containing "type client or task name" and a clear button. Below these filters, there are three columns of data for staff members:

Andy Williamson 2 Work Items / £50	(staff member not s 1 Work Item / £0	
Statutory	In 12 days	Statutory
limited JS	Best Builders Limited AW	Client Engager On

STEP 8

You can export the info to csv if you want

This screenshot is identical to the one in Step 7, but with the "export" button highlighted by a green box. A black tooltip with white text "export all work items list to CSV" is positioned above the button. The rest of the interface, including the search bar, filters, and data table, remains the same.

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