How to view deadlines in Client Engager

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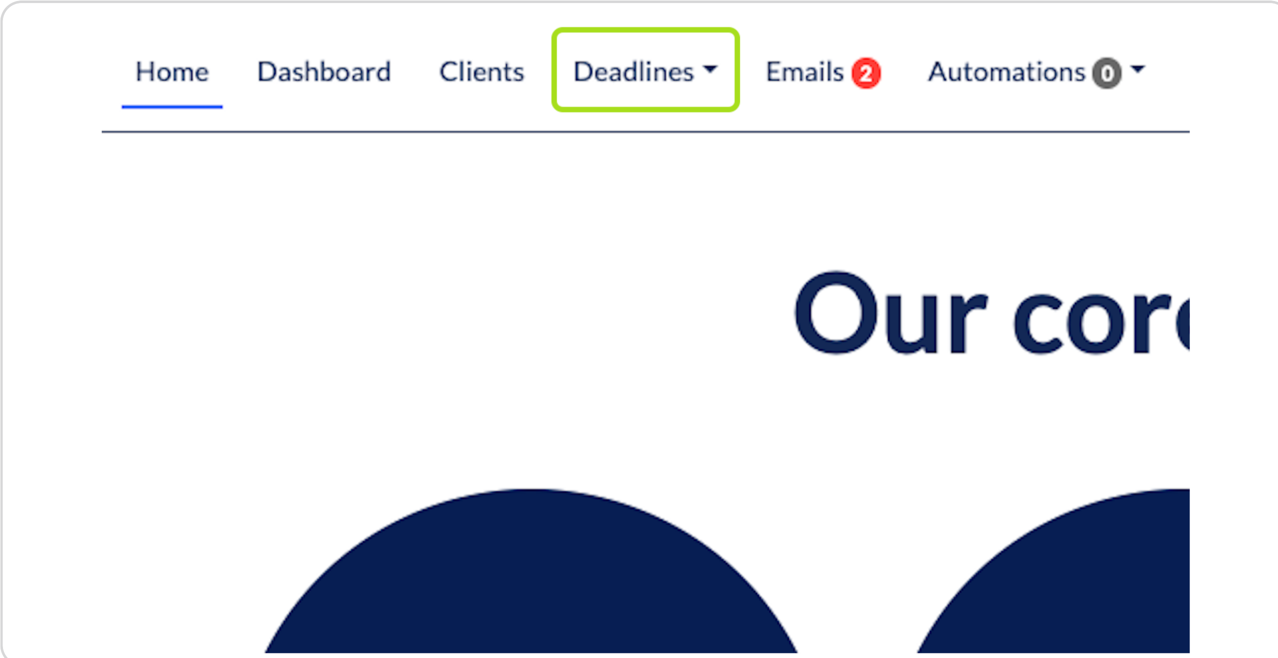
Created by	Creation Date	Last Updated
Johann Goree	June 3, 2023	June 3, 2023

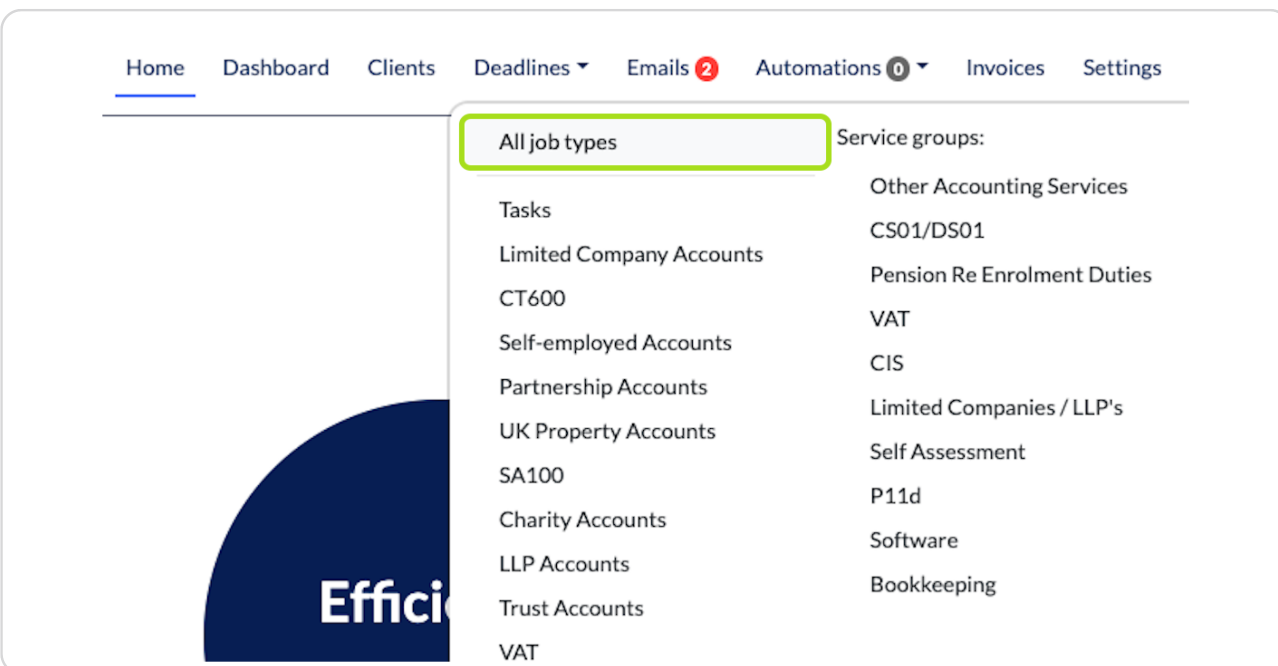
STEP 1

Click on Deadlines



STEP 2

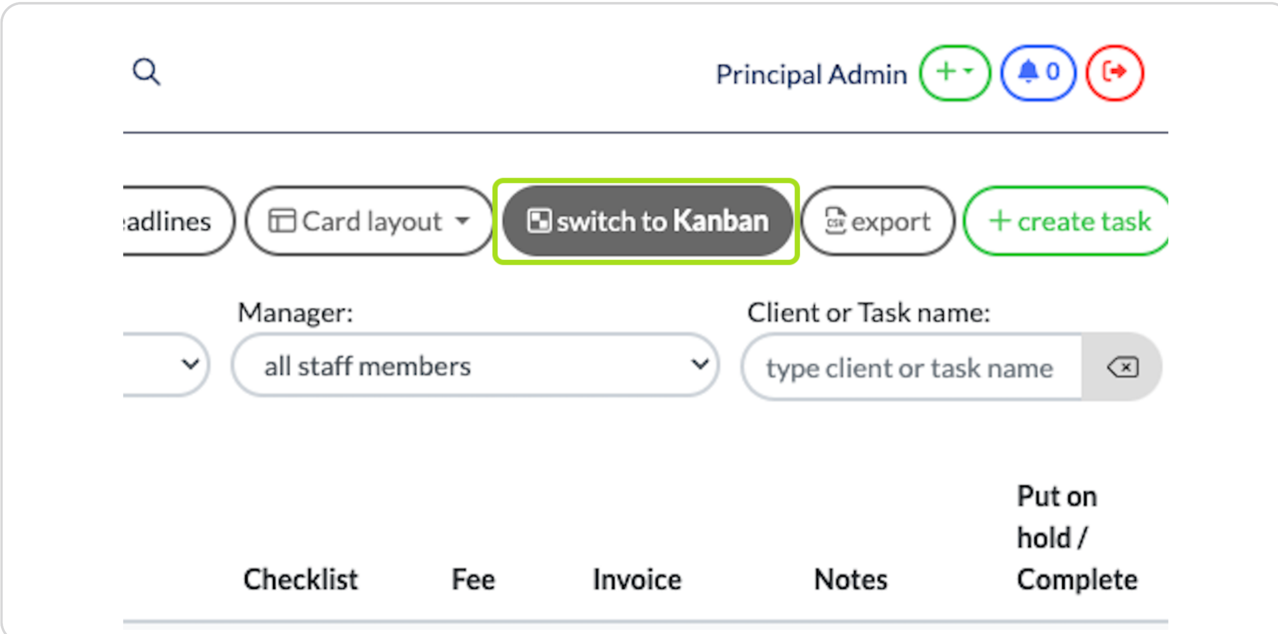
Click on All job types or a specific service your interested in



STEP 3

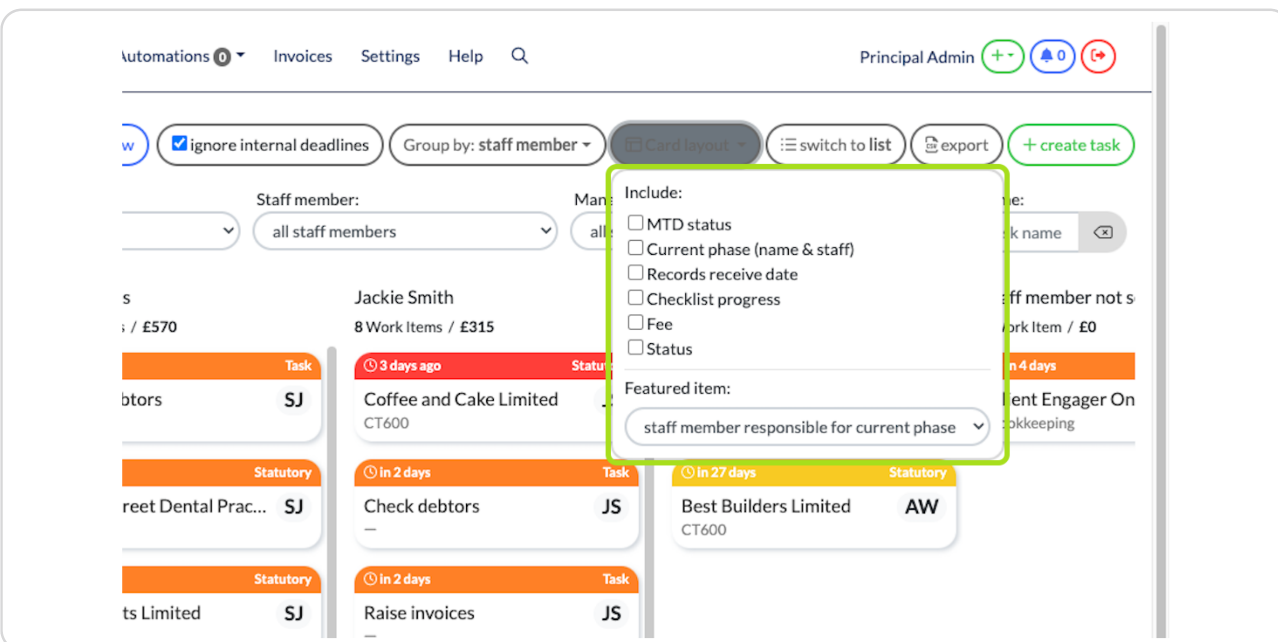
You can choose Kanban or list view.

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



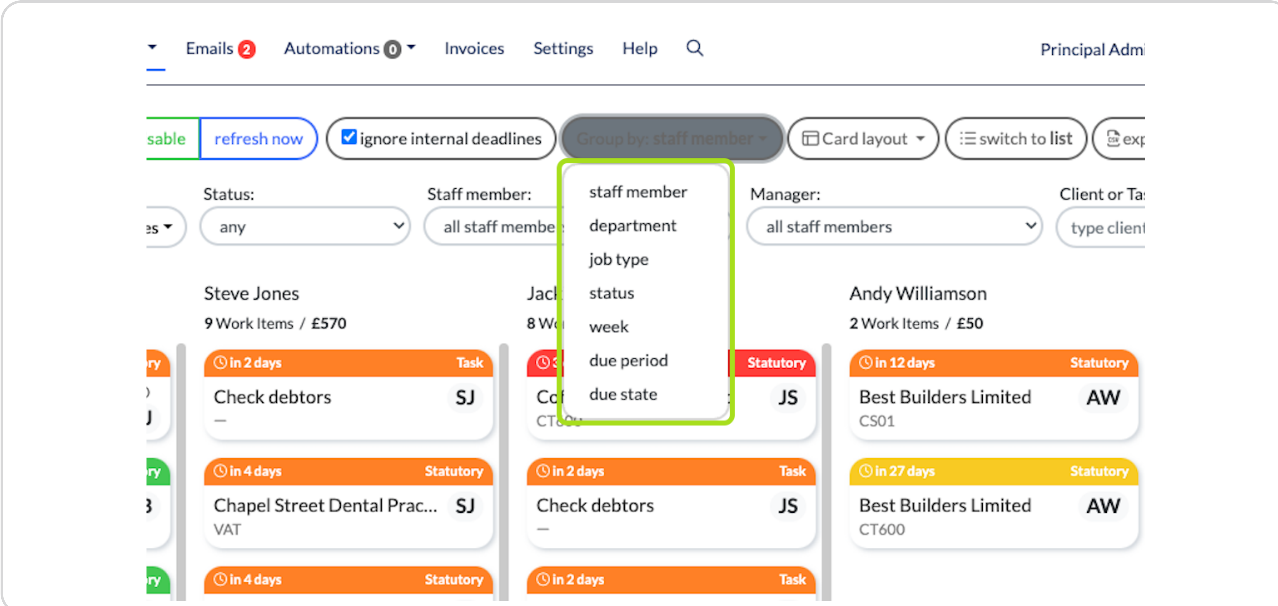
STEP 4

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



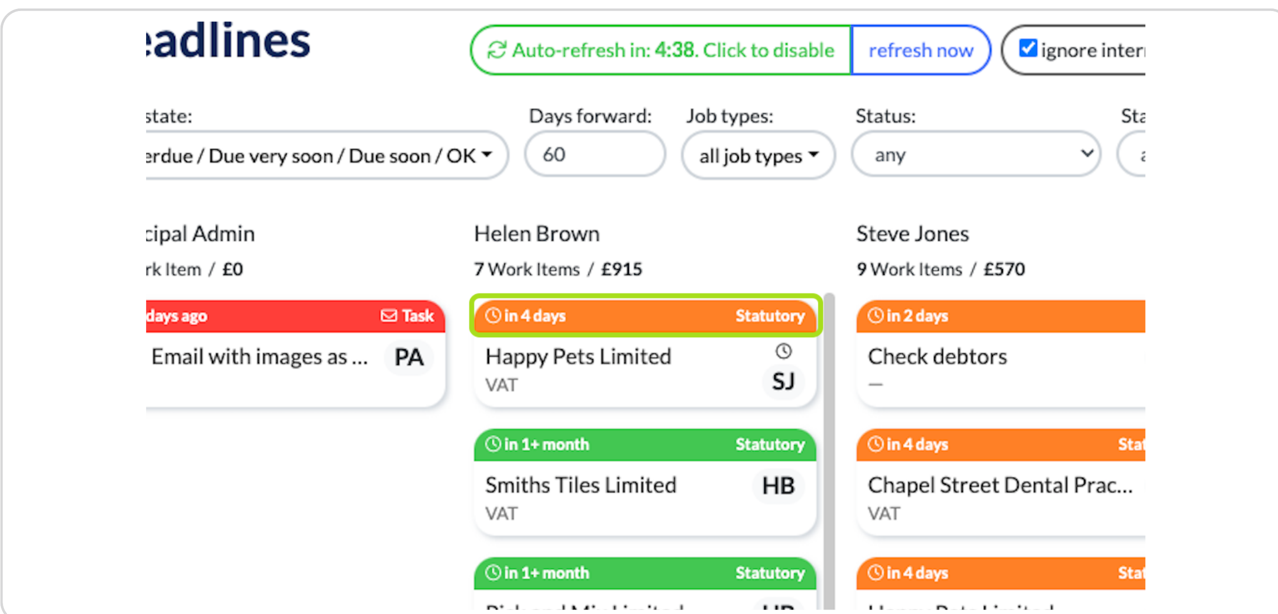
STEP 5

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



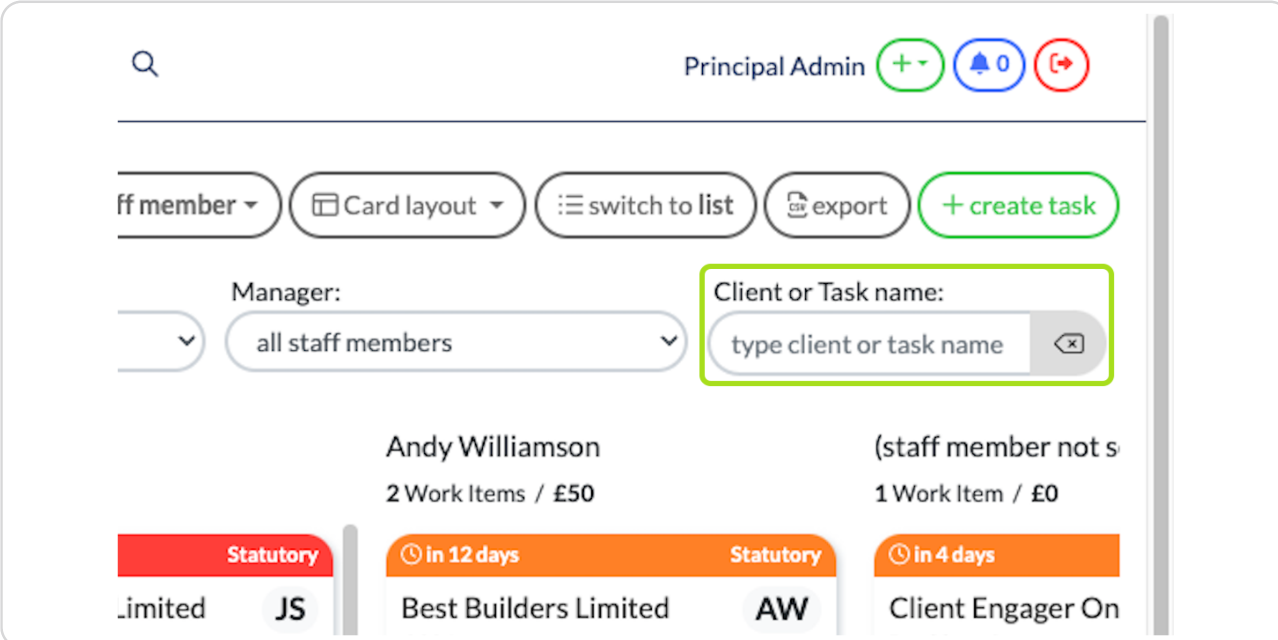
STEP 6

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



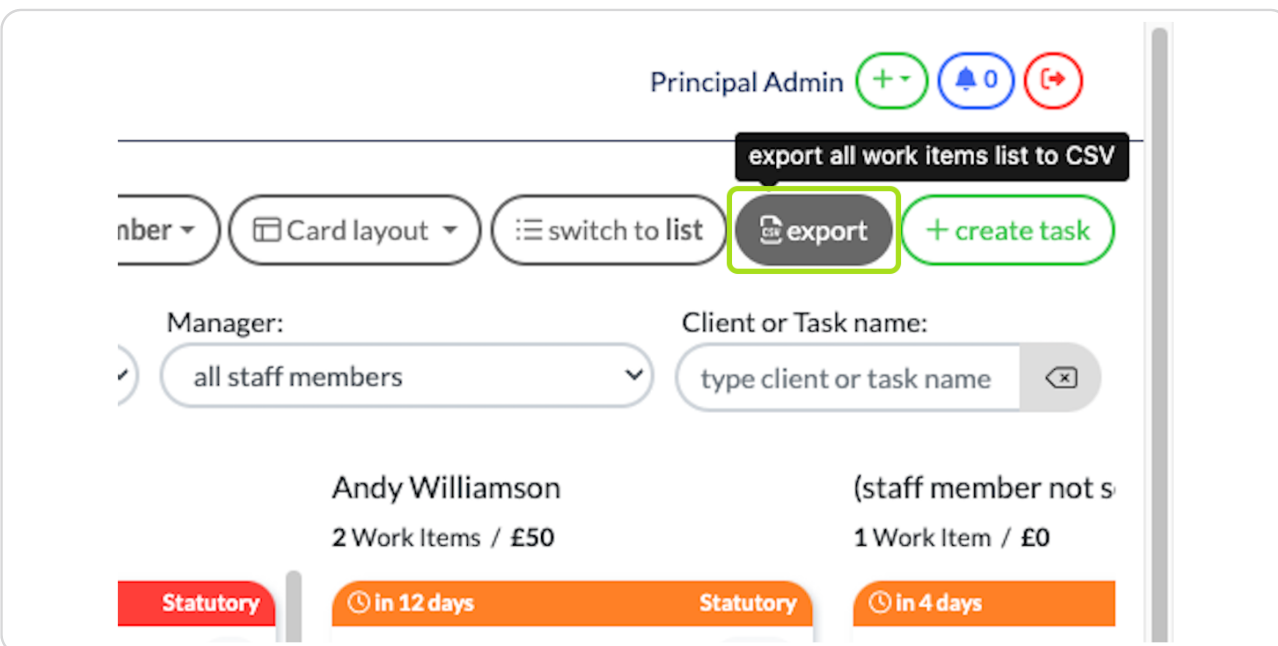
STEP 7

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



STEP 8

You can export the info to csv if you want



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