

# Email Management

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

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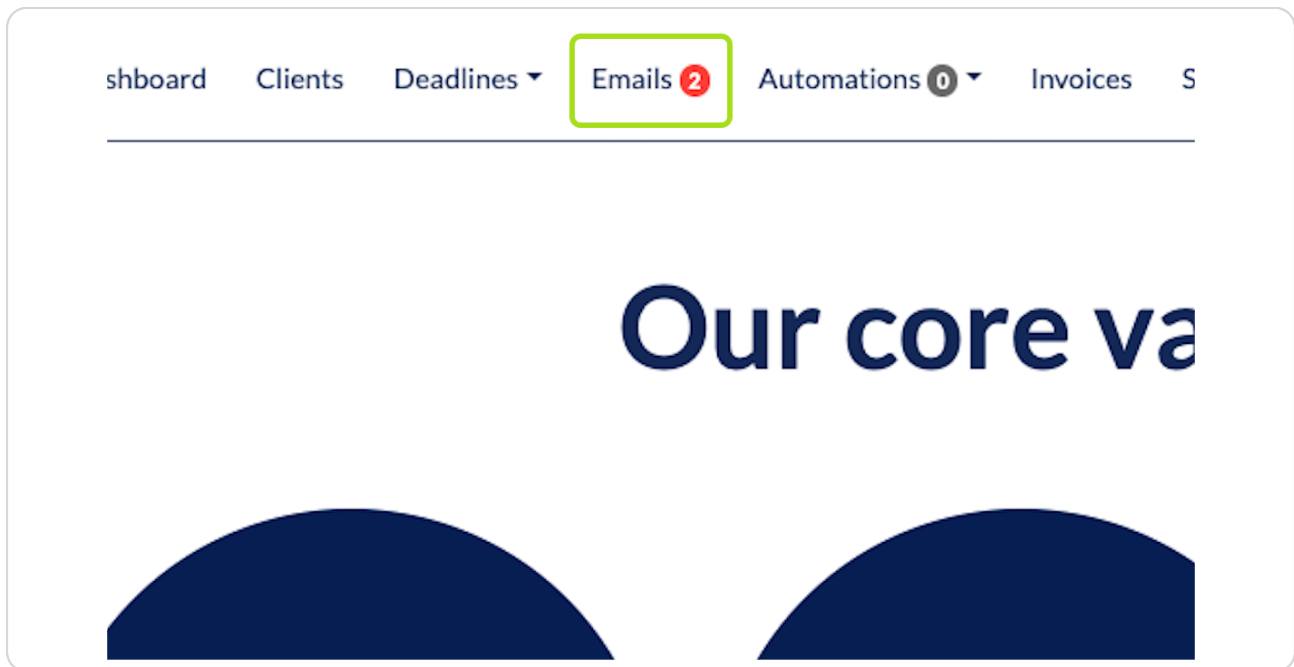
Created by  
Johann Goree

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June 3, 2023

Last Updated  
June 3, 2023

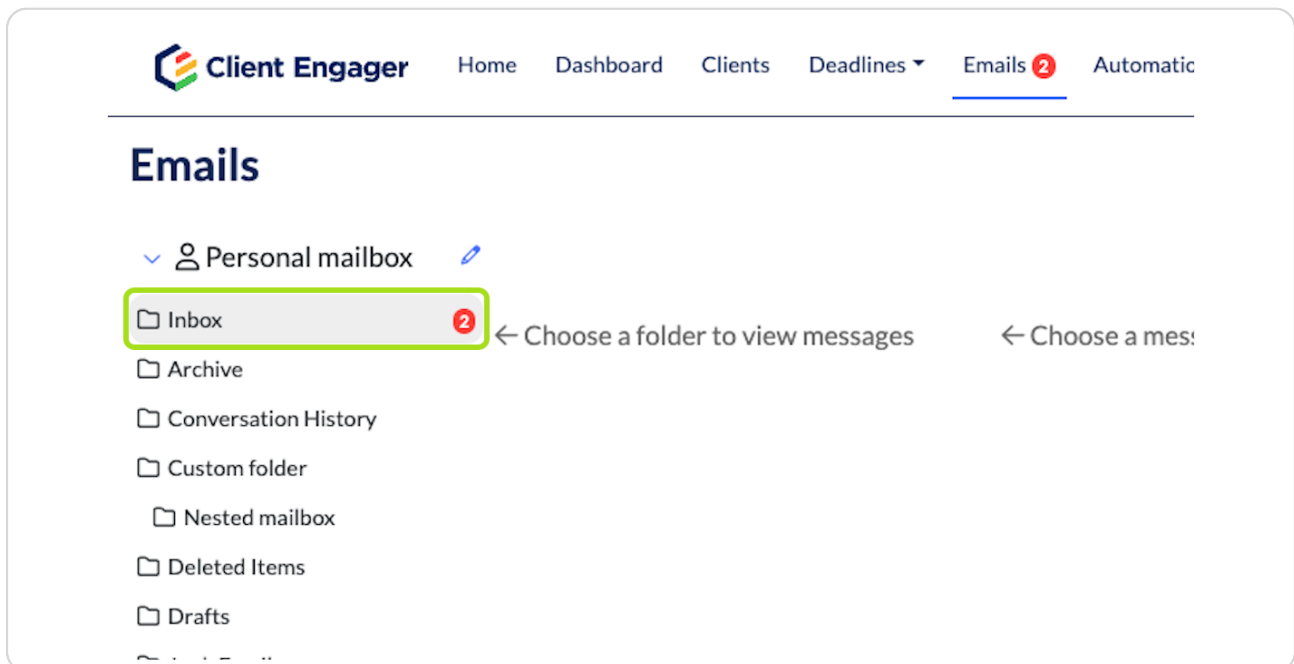
## STEP 1

### Click on Emails



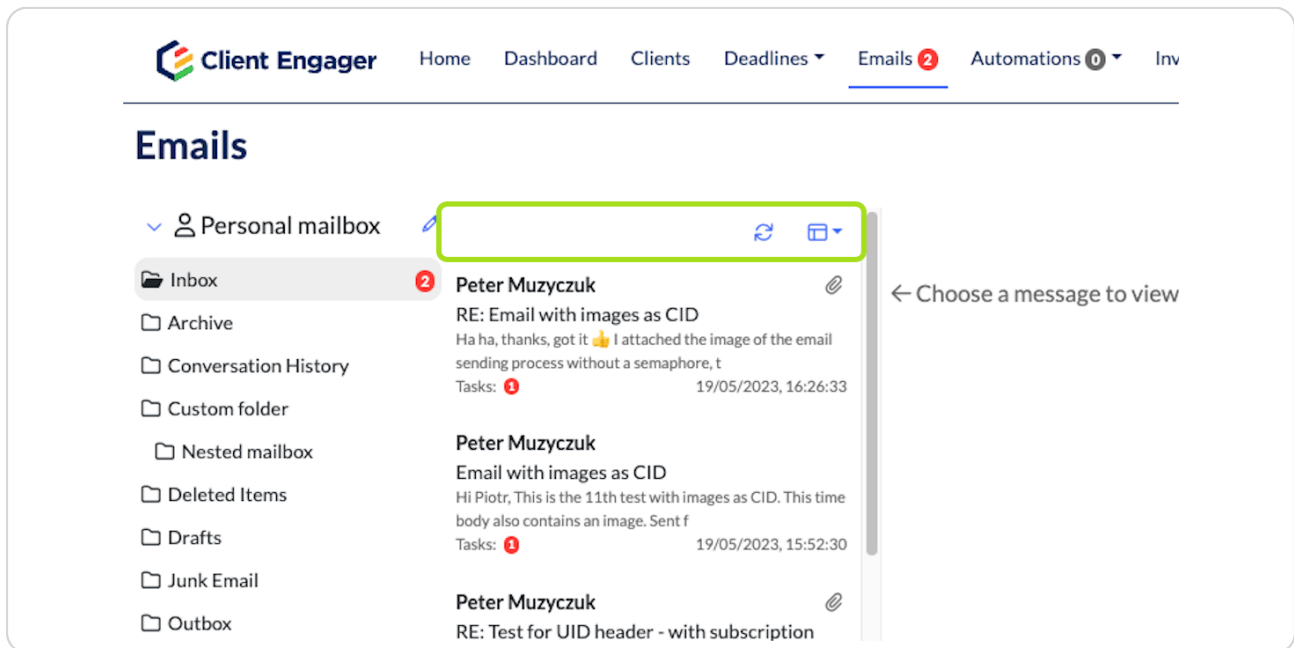
## STEP 2

### Click on Inbox...



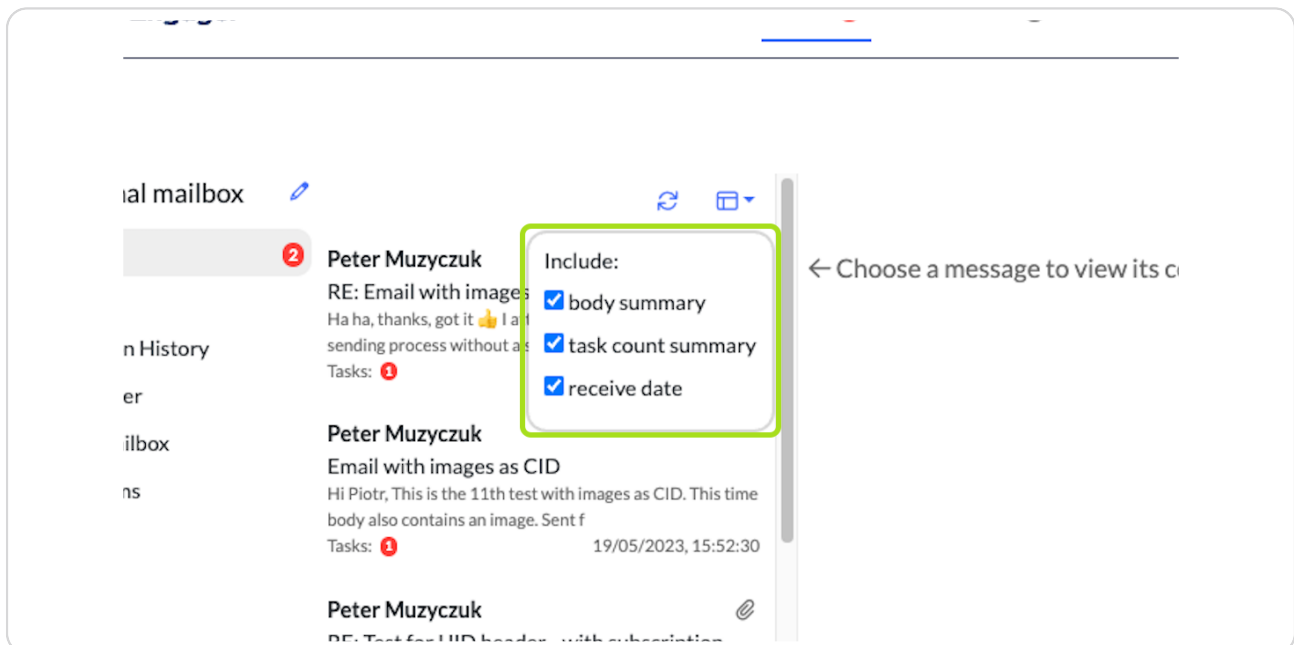
### STEP 3

here you can refresh your inbox but this should happen automatically. You can also click the square icon to select what info you see in this column



### STEP 4

You can choose to hide or show body summary, task count and receive date



## STEP 5

To view and reply to emails etc click on the email you want to read or action

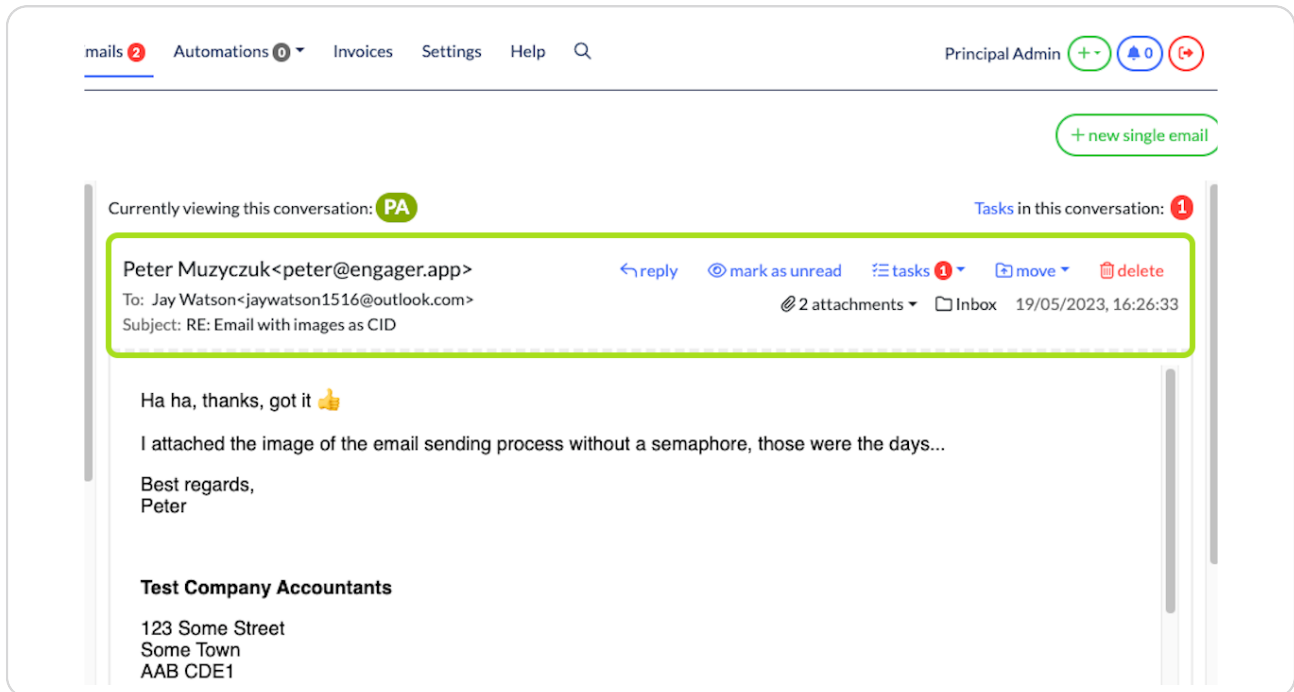
The screenshot displays the 'Client Engager' application interface. At the top, a navigation bar includes 'Home', 'Dashboard', 'Clients', 'Deadlines', 'Emails' (with a red badge showing '2'), and 'Automations' (with a badge showing '0'). The main heading is 'Emails'. On the left, a sidebar shows the 'Personal mailbox' with folders: 'Inbox' (2), 'Archive', 'Conversation History', 'Custom folder', 'Nested mailbox', 'Deleted Items', 'Drafts', 'Junk Email', and 'Outbox'. The main area shows a list of emails from 'Peter Muzyczuk'. The first email is 'RE: Email with images' with a preview: 'Ha ha, thanks, got it 🙌 I at sending process without a s' and 'Tasks: 1'. A green box highlights the preview text. To the right of this email, a 'Message layout' panel is open, showing options to 'Include:' 'body summary', 'task count summary', and 'receive date', all of which are checked. A tooltip 'Message layout' points to this panel. To the right of the panel, a text prompt says '← Choose a message to view'. Below the first email, another email from 'Peter Muzyczuk' is visible with the subject 'RE: Test for UID header - with subscription'.

## STEP 6

### Top menu...

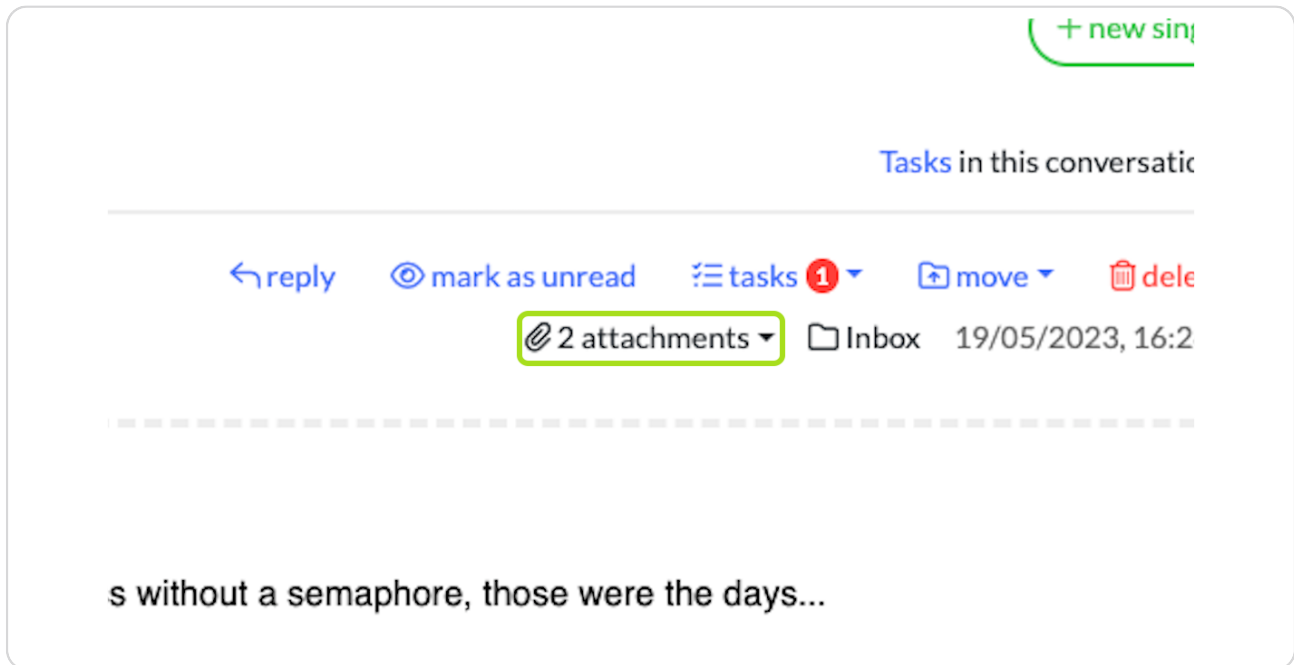
Here you can view standard email details, dates, subject and sender etc

You can reply, mark as read, see if you have any tasks against this email, move the email to a folder in your email inbox, delete the email, and see attachments



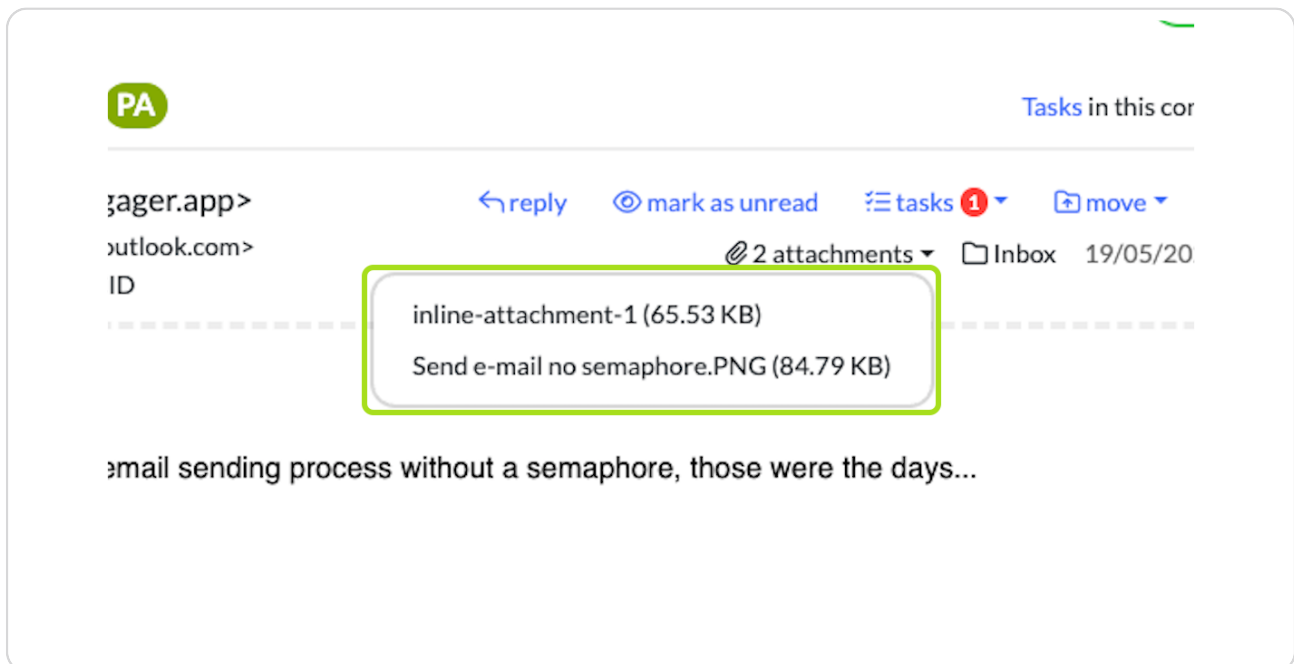
## STEP 7

Click on attachments to see and download them



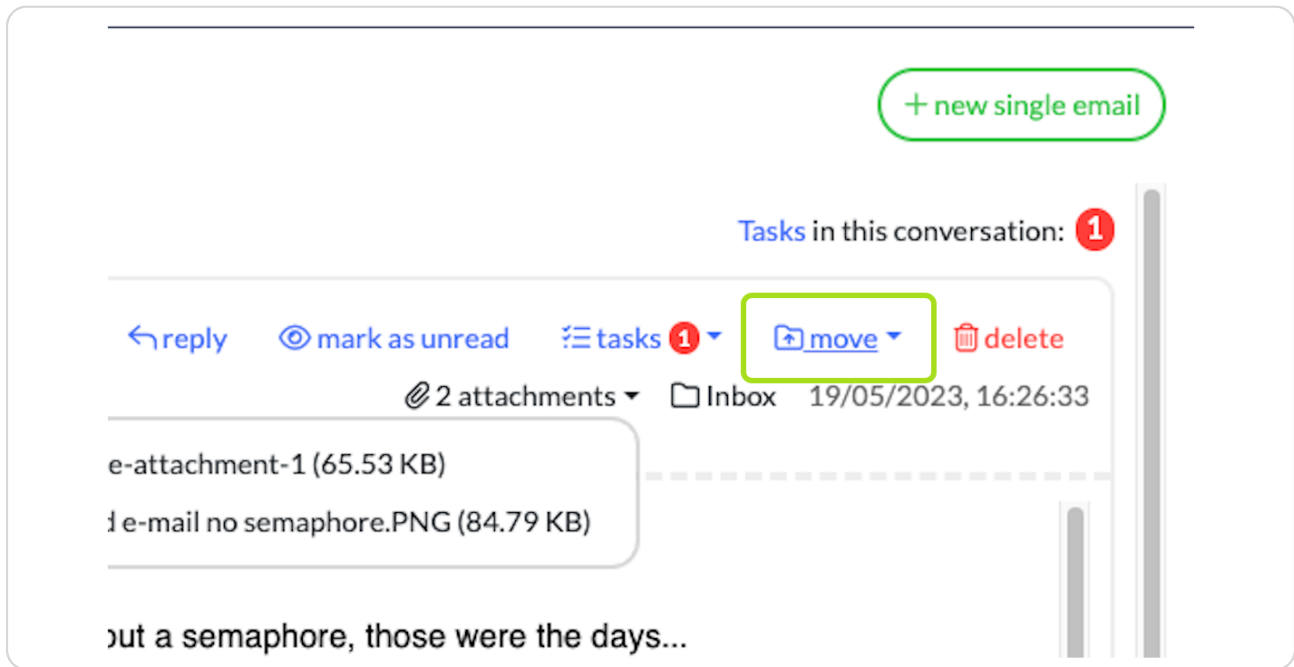
## STEP 8

Click on inline-attachment-1 (65.53 KB)...



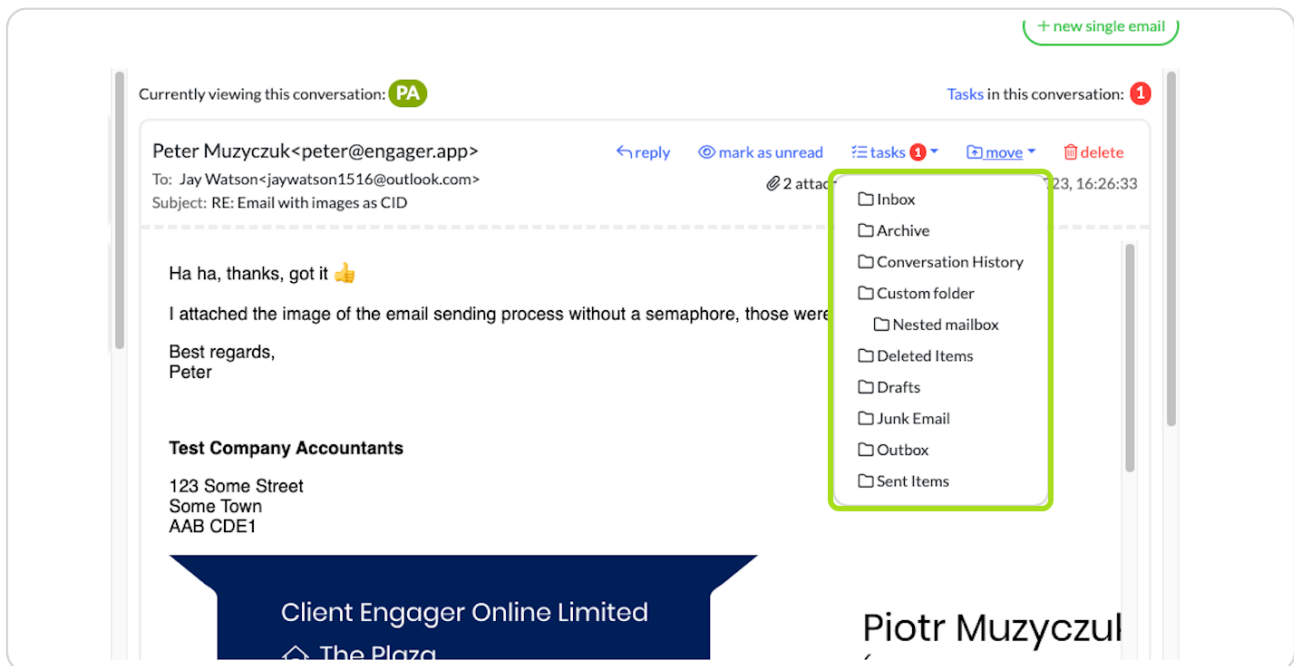
## STEP 9

Click on **move**



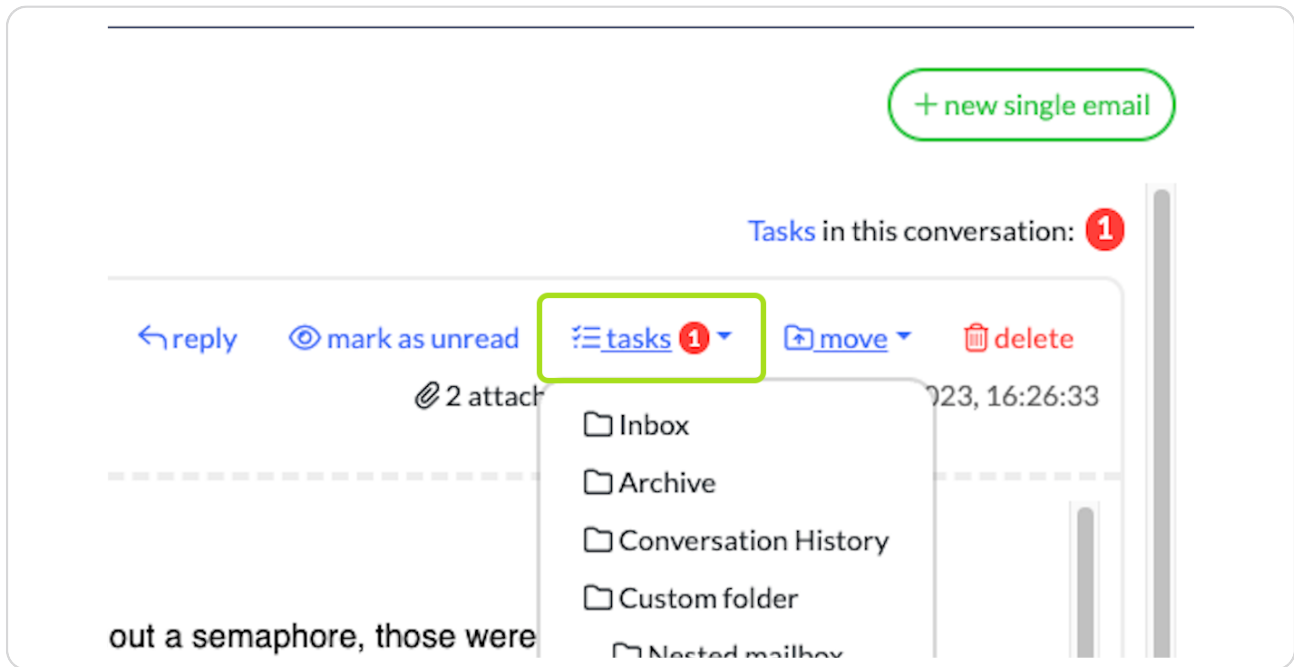
## STEP 10

on this menu you can choose where to move the email



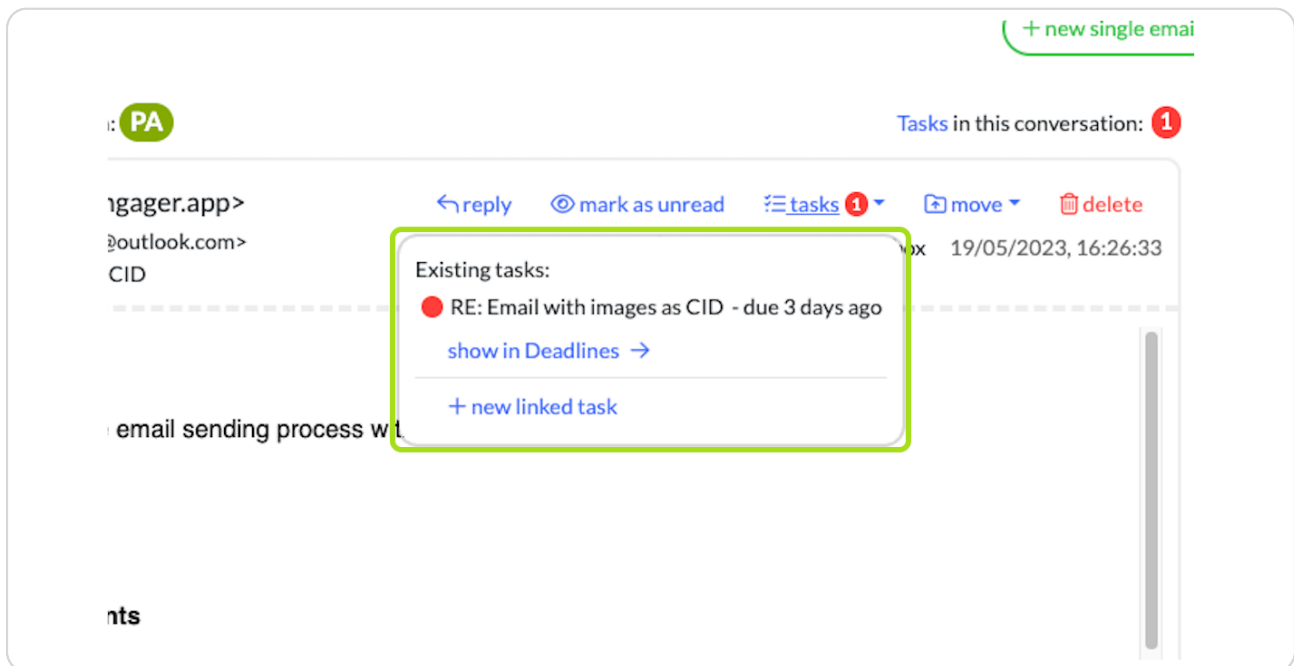
## STEP 11

Click on **tasks** to see or create tasks



## STEP 12

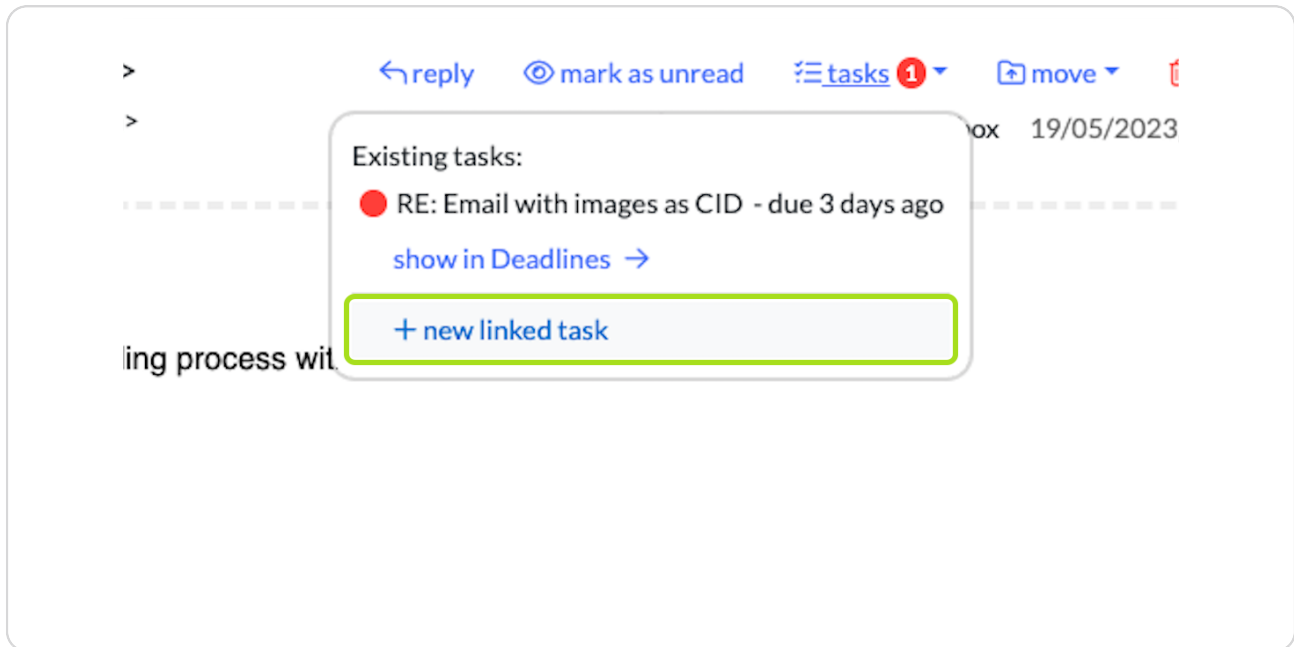
Click on Existing tasks:...





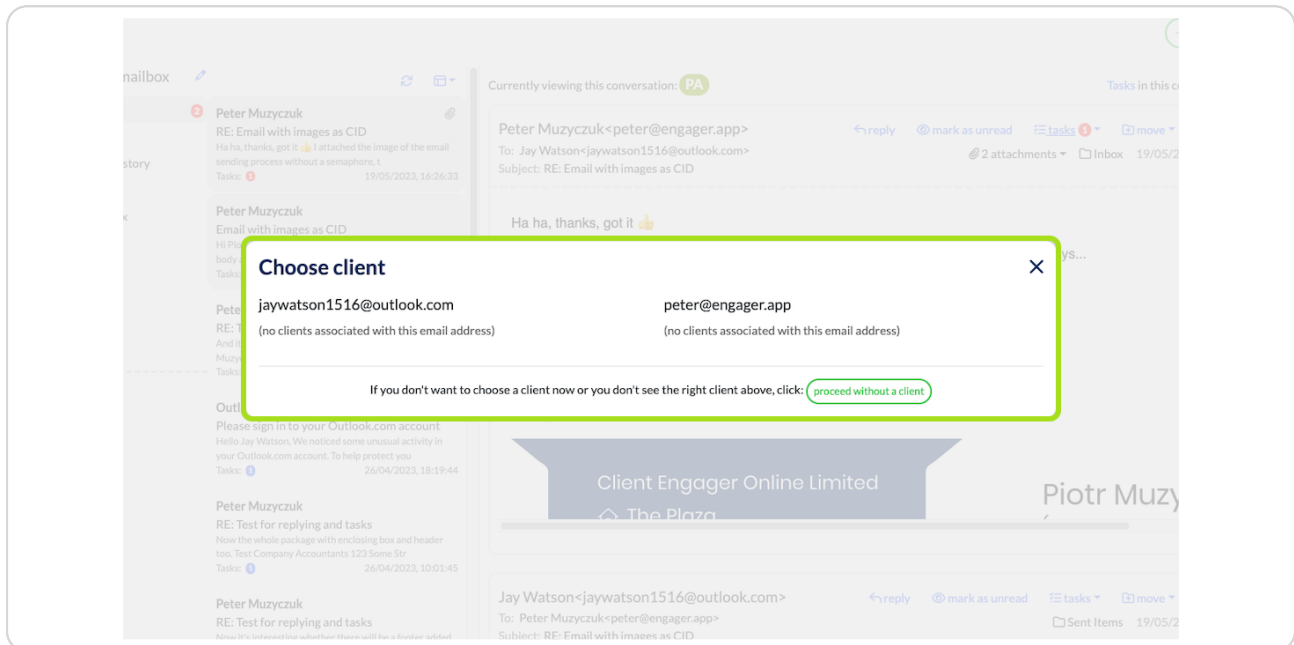
## STEP 13

Click on new linked task to create



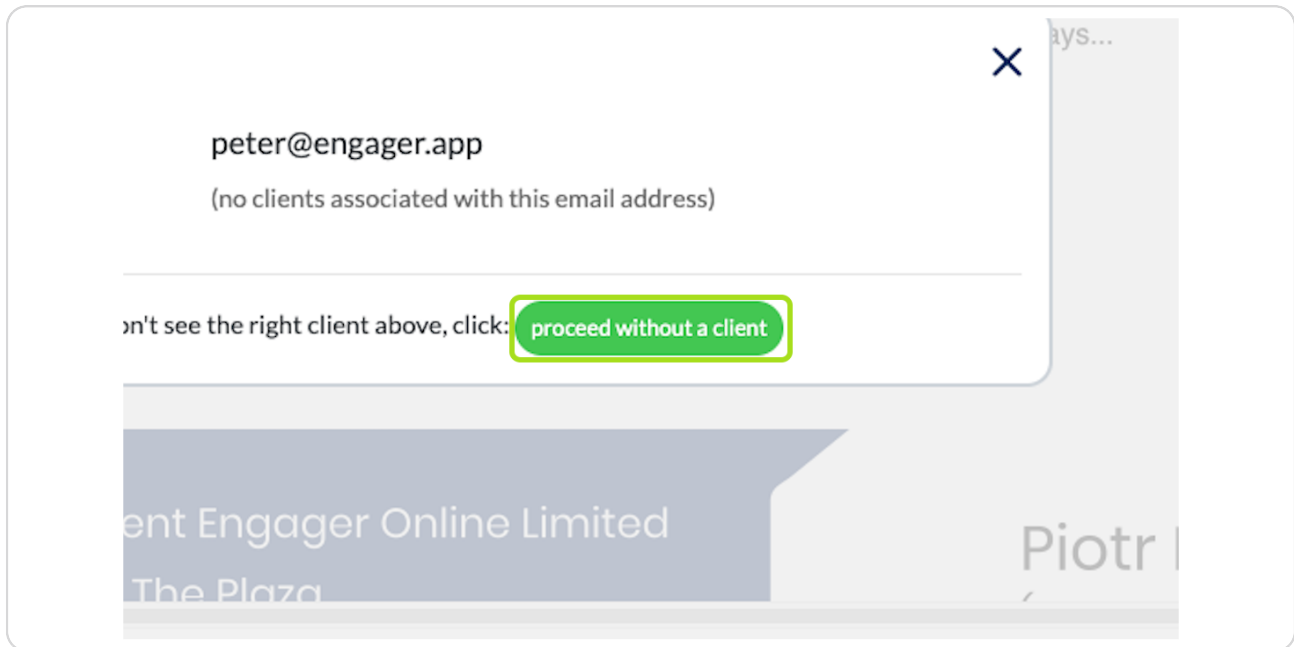
## STEP 14

The system will check if the email is linked to a client and let you select the client if it is



## STEP 15

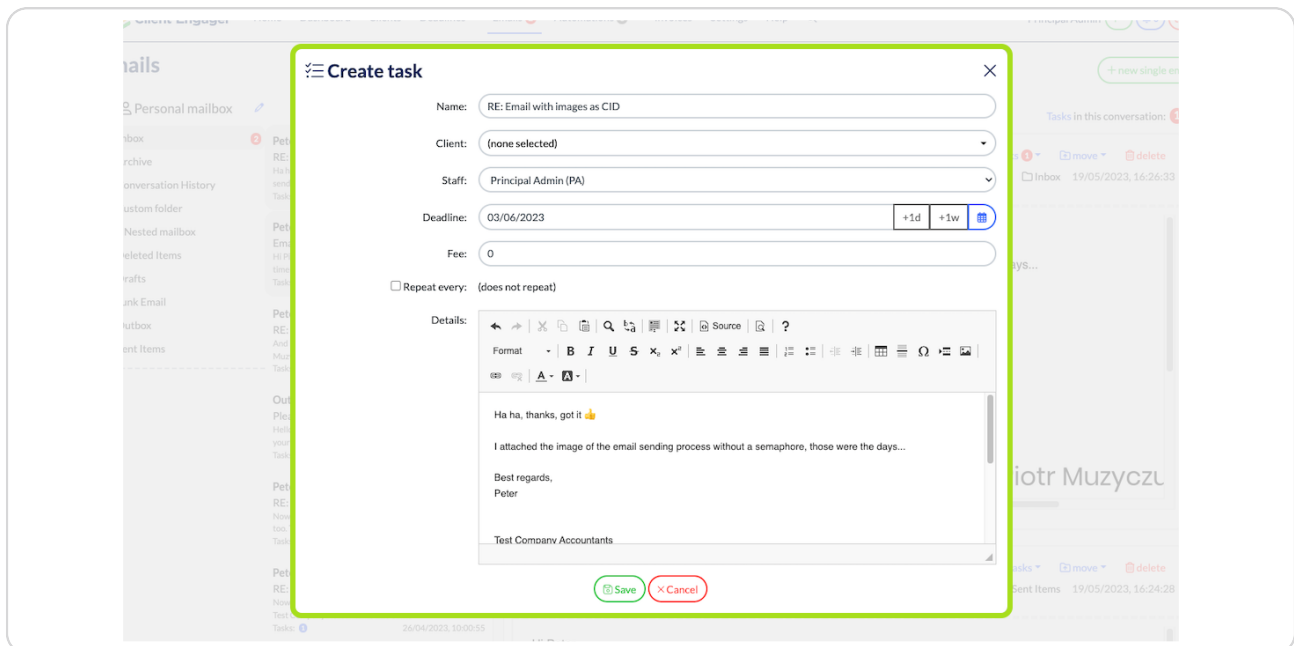
Click on proceed without a client if its not linked to a client



A modal dialog box with a close button (X) in the top right corner. The text inside reads: "peter@engager.app" followed by "(no clients associated with this email address)". Below this, there is a line of text: "Don't see the right client above, click:". To the right of this text is a green button with the text "proceed without a client". The background of the dialog is a blurred screenshot of an email interface showing "Engager Online Limited" and "The Plaza".

## STEP 16

Create the task as normal and click save, the contents of the email will go in the notes section automatically



A screenshot of the "Create task" modal dialog. The dialog has a title bar with a hamburger menu icon, the text "Create task", and a close button (X). The form fields are as follows: "Name" with the value "RE: Email with images as CID"; "Client" with a dropdown menu showing "(none selected)"; "Staff" with a dropdown menu showing "Principal Admin (PA)"; "Deadline" with the value "03/06/2023" and buttons for "+1d" and "+1w"; "Fee" with the value "0". There is a checkbox for "Repeat every:" with the text "(does not repeat)". Below these fields is a "Details" section with a rich text editor. The editor contains the text: "Ha ha, thanks, got it 🙌", "I attached the image of the email sending process without a semaphore, those were the days...", "Best regards, Peter", and "Test Company Accountants". At the bottom of the dialog are two buttons: "Save" (green) and "Cancel" (red). The background of the dialog is a blurred screenshot of an email interface.

*Tango*

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