Navigating the client page in Client Engager

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

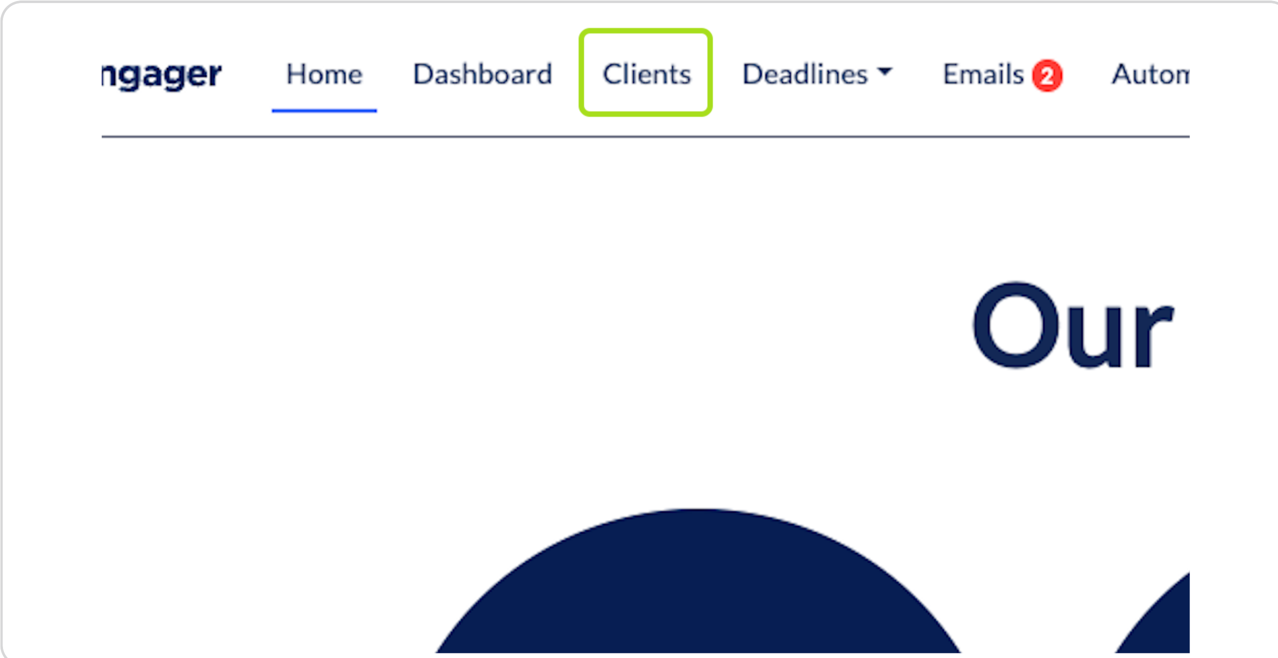
Created by
Johann Goree

Creation Date
June 3, 2023

Last Updated
June 3, 2023

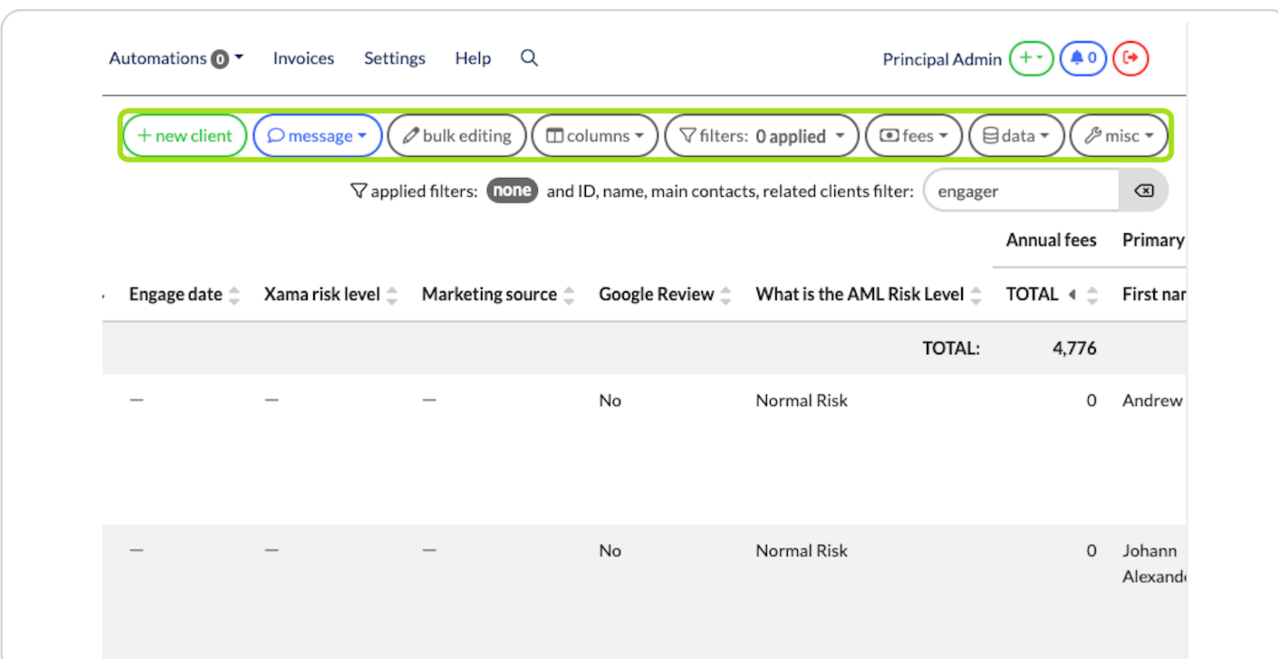
STEP 1

Click on Clients



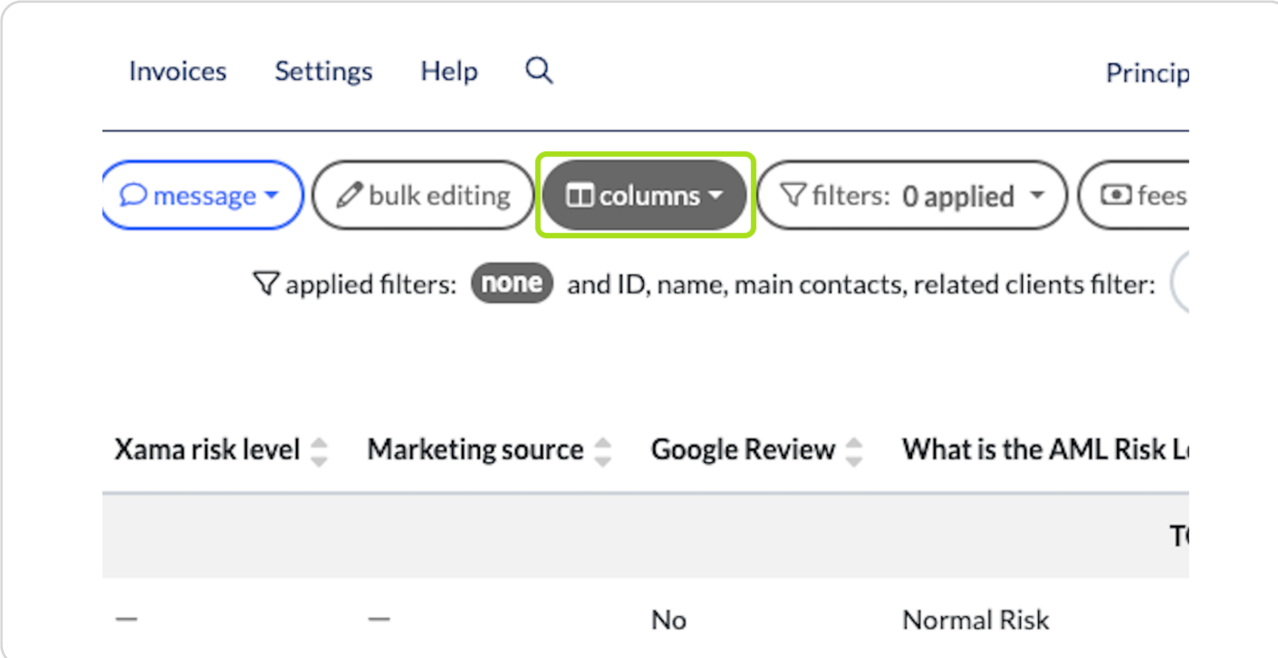
STEP 2

You have various tools along the top



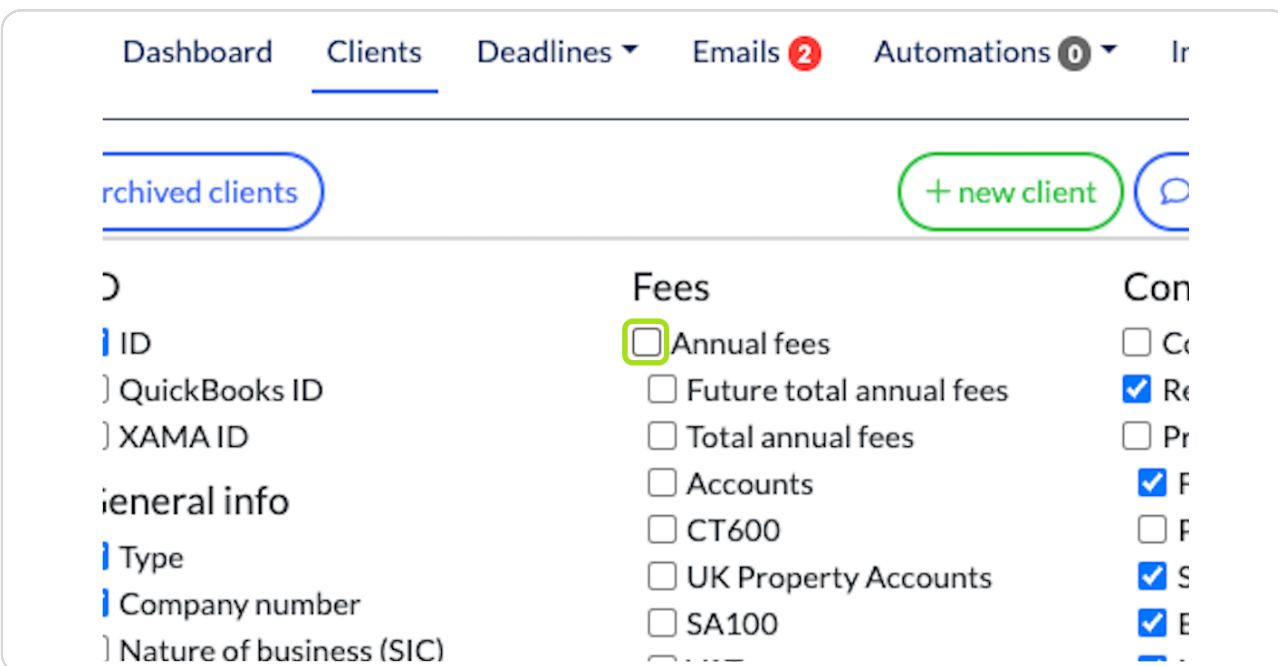
STEP 3

Click on columns



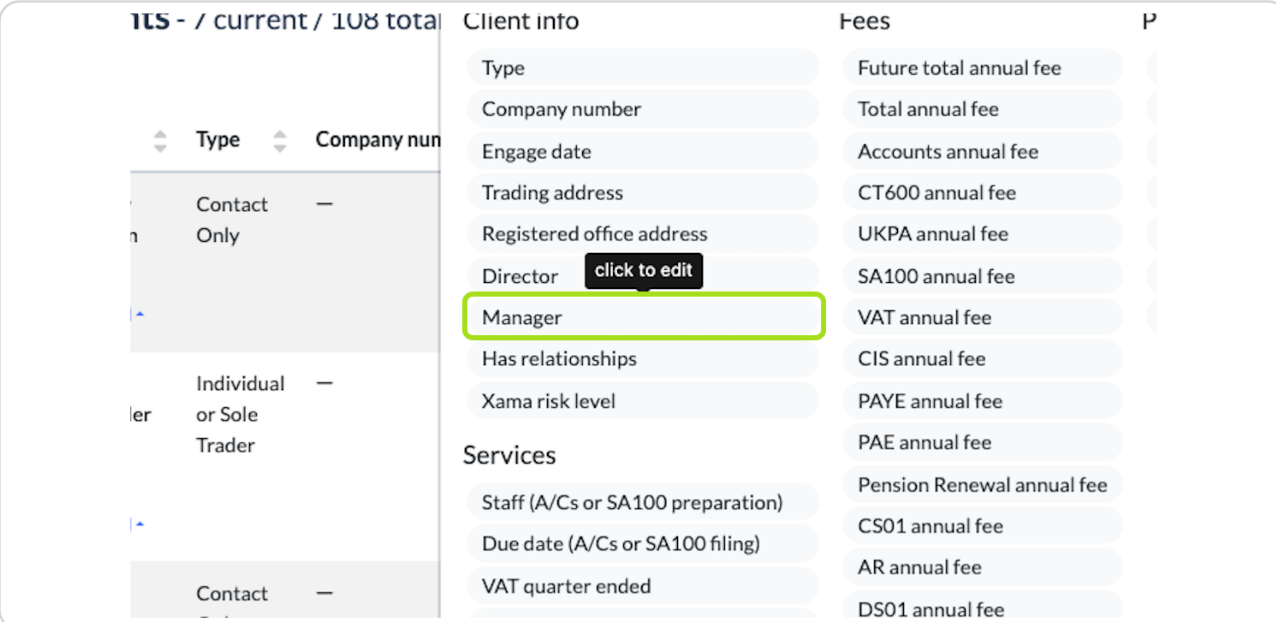
STEP 4

This gives you the ability to choose which columns to see in the client list



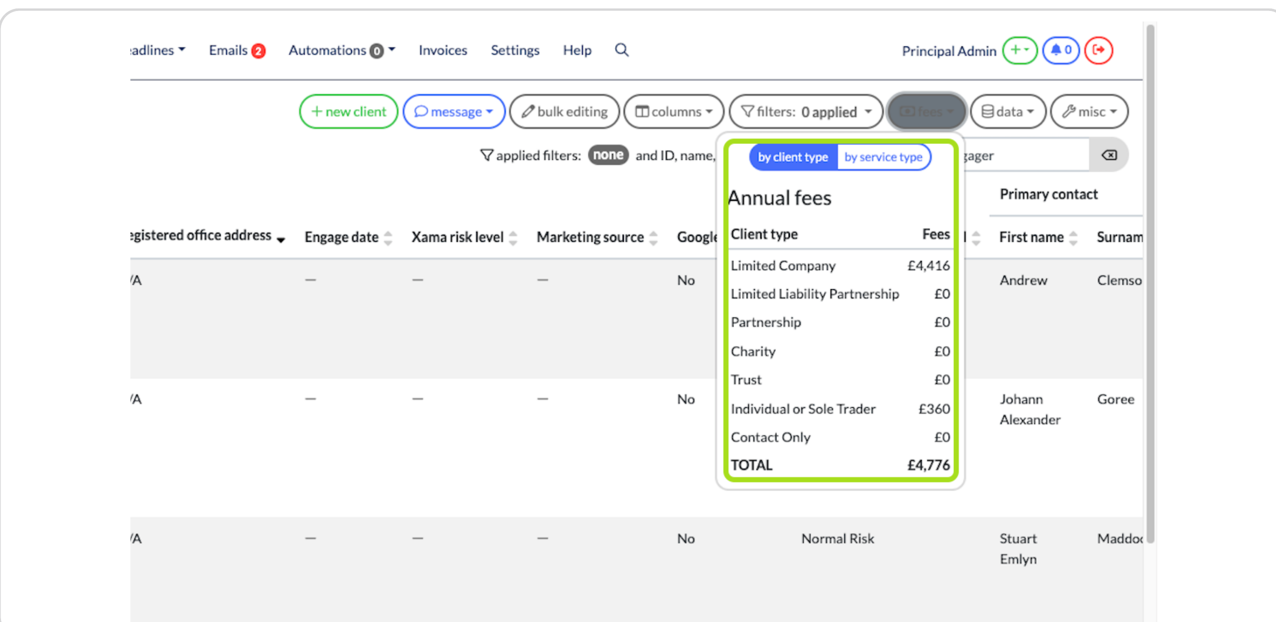
STEP 5

Click on filter and this gives you the ability to filter information similar to on excel



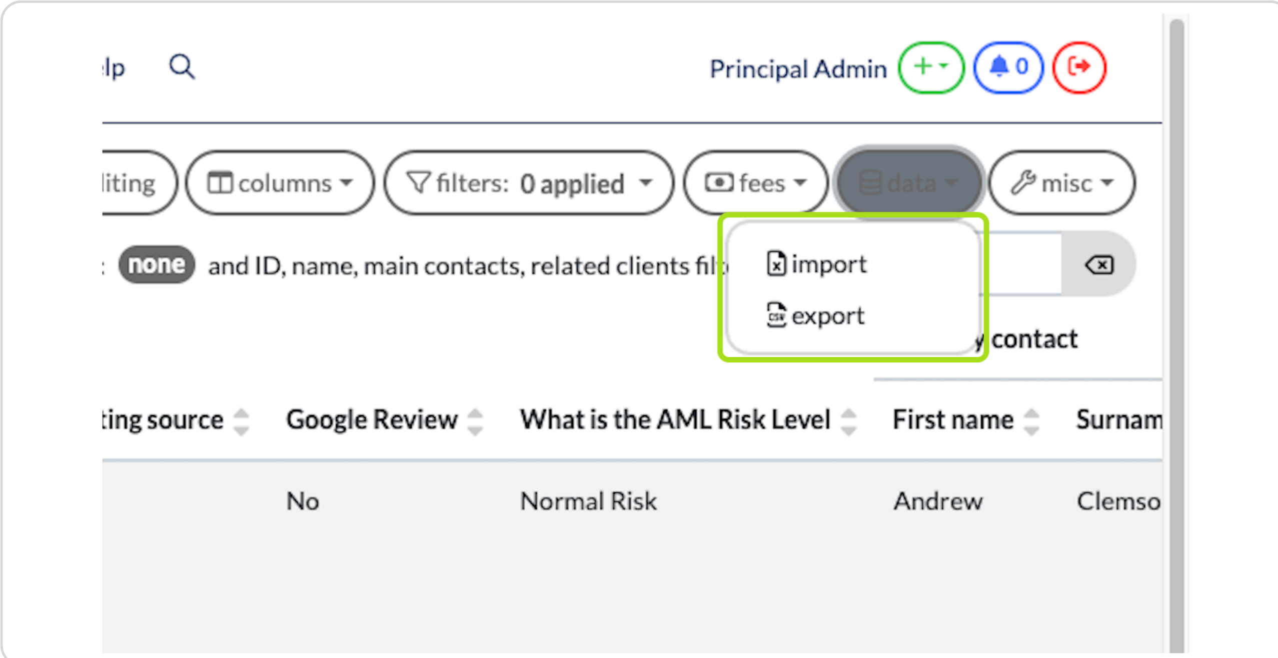
STEP 6

Click on fees and if you are recording fee in Client Engager this will show you a break down of fees in services and client type



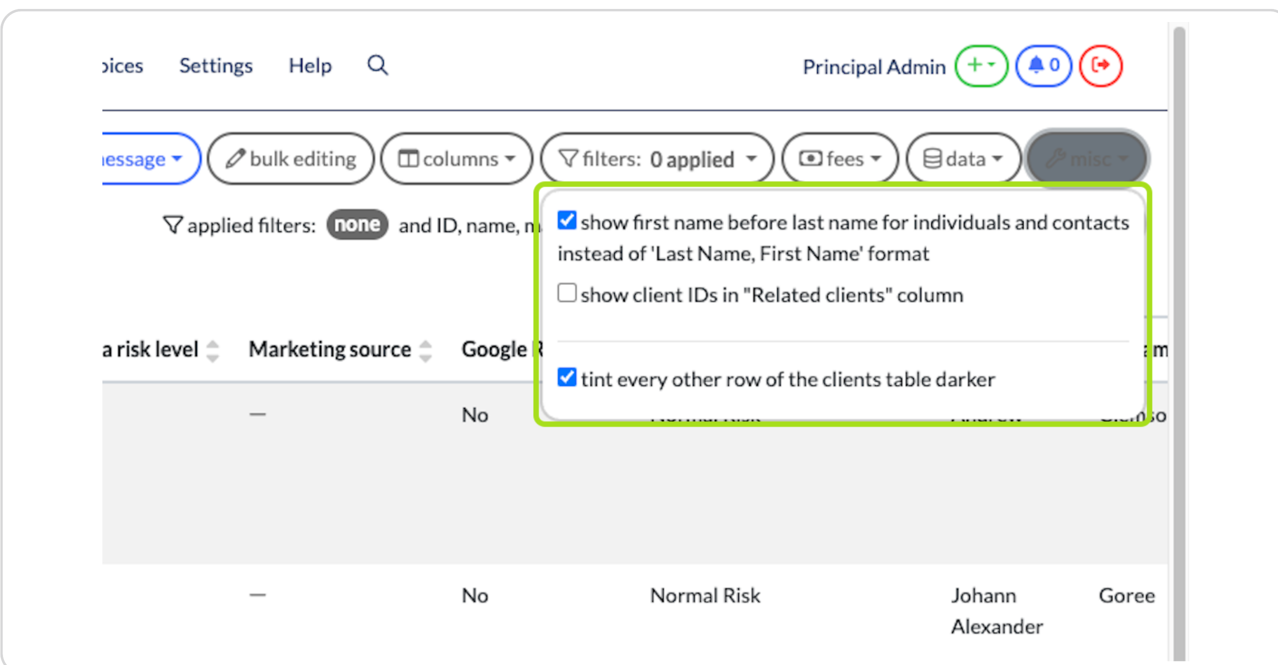
STEP 7

You can import data and export it by clicking data



STEP 8

Under Misc you can tailor how certain information displays



Tango

Never miss a step again. Visit Tango.us