

# Managing Active Clients: Client Engagement and Communication Review

17 Steps

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Created by

Johann Goree

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December 31, 2023



## STEP 1

### Click on Client Engager Online Limited

Andy Individual (not linked) not started  
Wainwright or Sole  
✉️ @ Trader

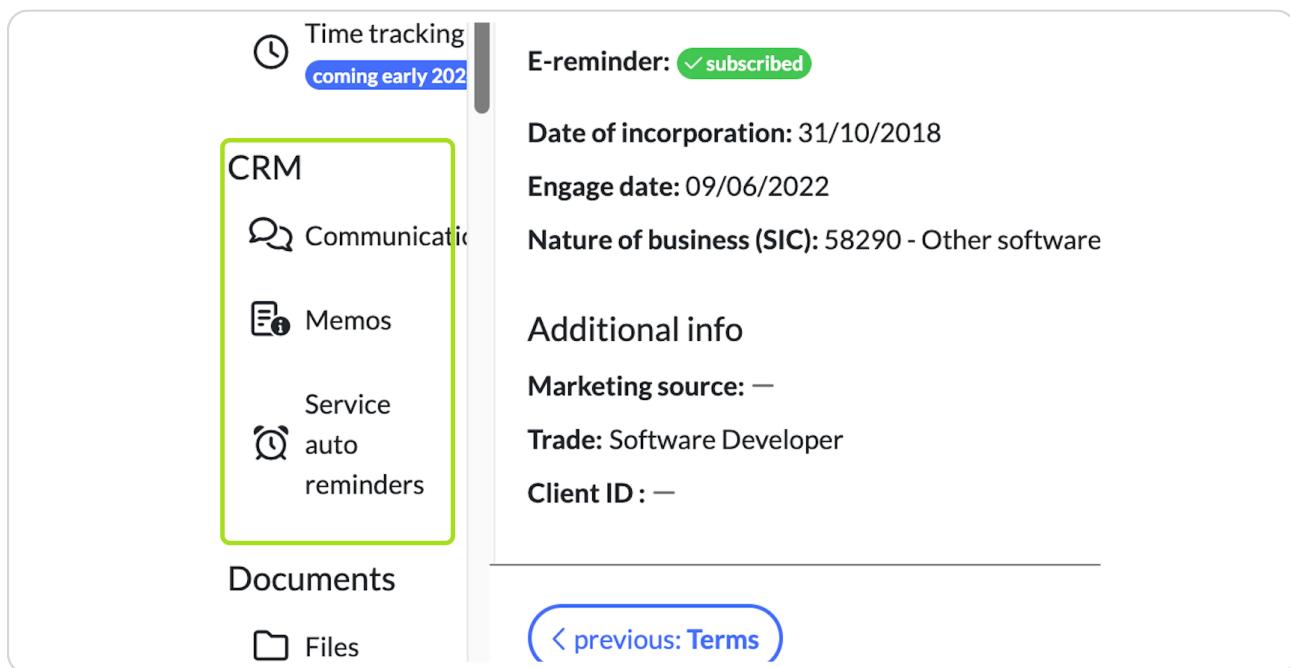


Client Limited (in progress) N/A  
Engager Online Company  
Limited



## STEP 2

### The logs are under CRM



Time tracking  
coming early 202

CRM

Communication

Memos

Service

auto reminders

Documents

Files

E-reminder: ✓ subscribed

Date of incorporation: 31/10/2018

Engage date: 09/06/2022

Nature of business (SIC): 58290 - Other software

Additional info

Marketing source: —

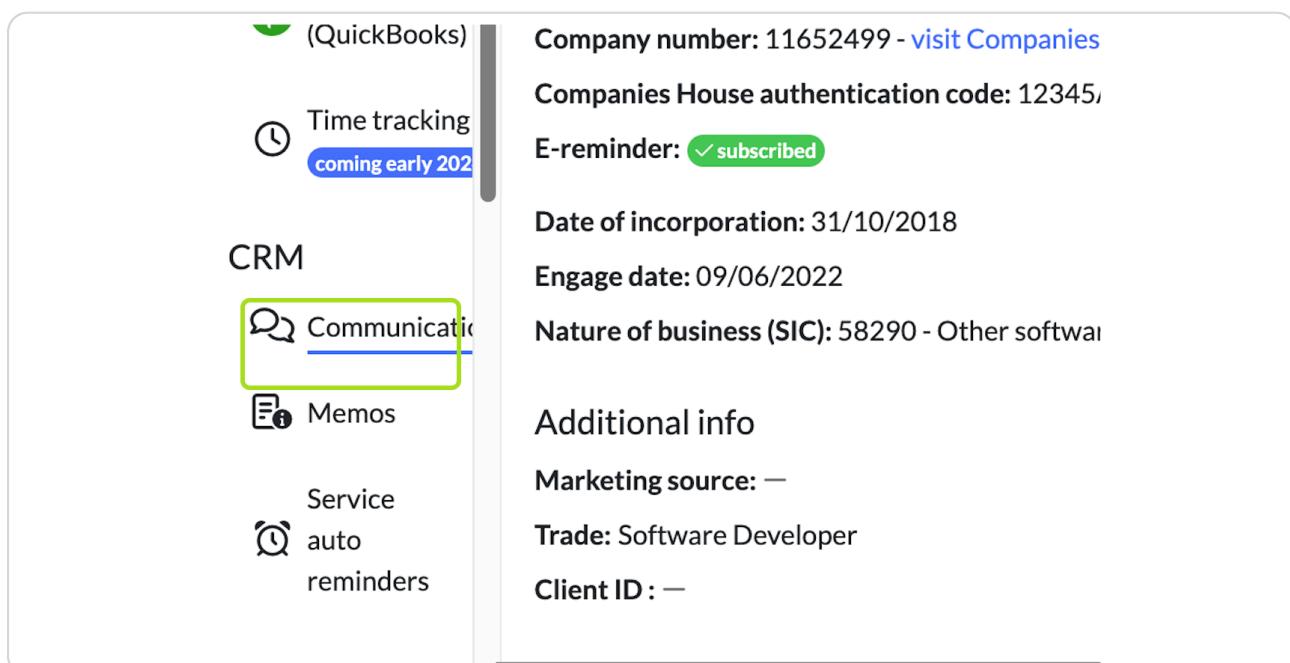
Trade: Software Developer

Client ID : —

< previous: Terms

## STEP 3

### Click on Communication



(QuickBooks)

Time tracking  
coming early 202

CRM

Communication

Memos

Service

auto reminders

Company number: 11652499 - [visit Companies](#)

Companies House authentication code: 12345,

E-reminder: ✓ subscribed

Date of incorporation: 31/10/2018

Engage date: 09/06/2022

Nature of business (SIC): 58290 - Other software

Additional info

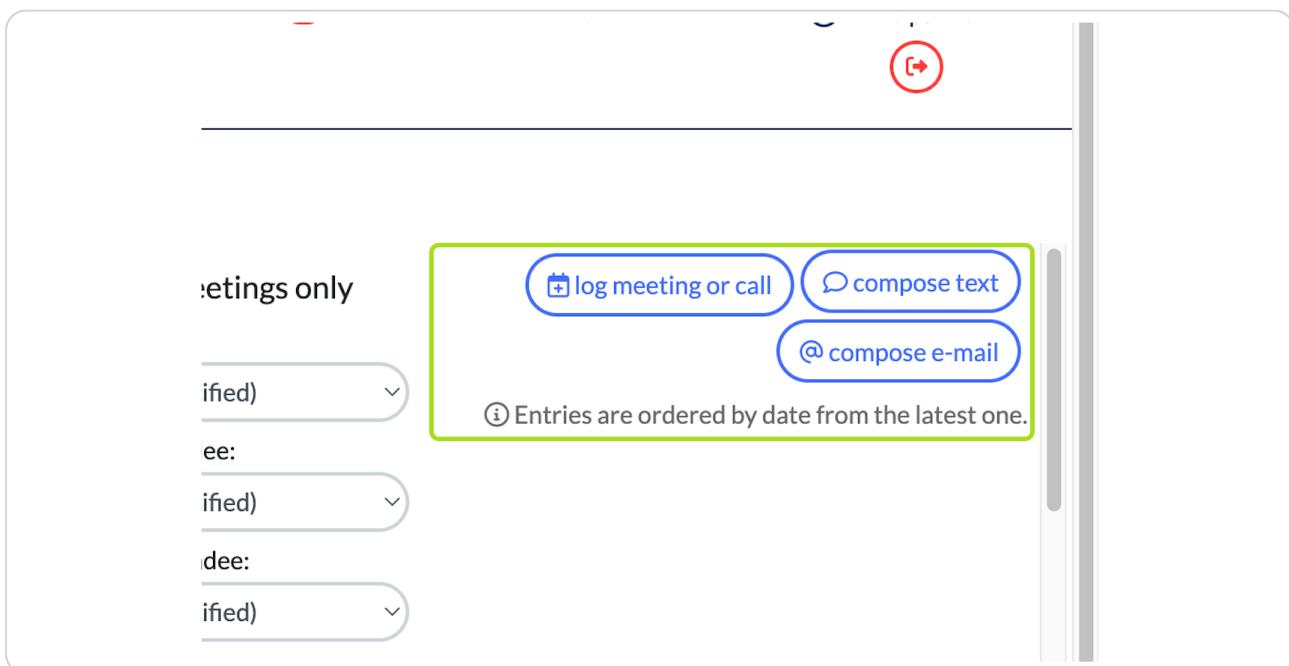
Marketing source: —

Trade: Software Developer

Client ID : —

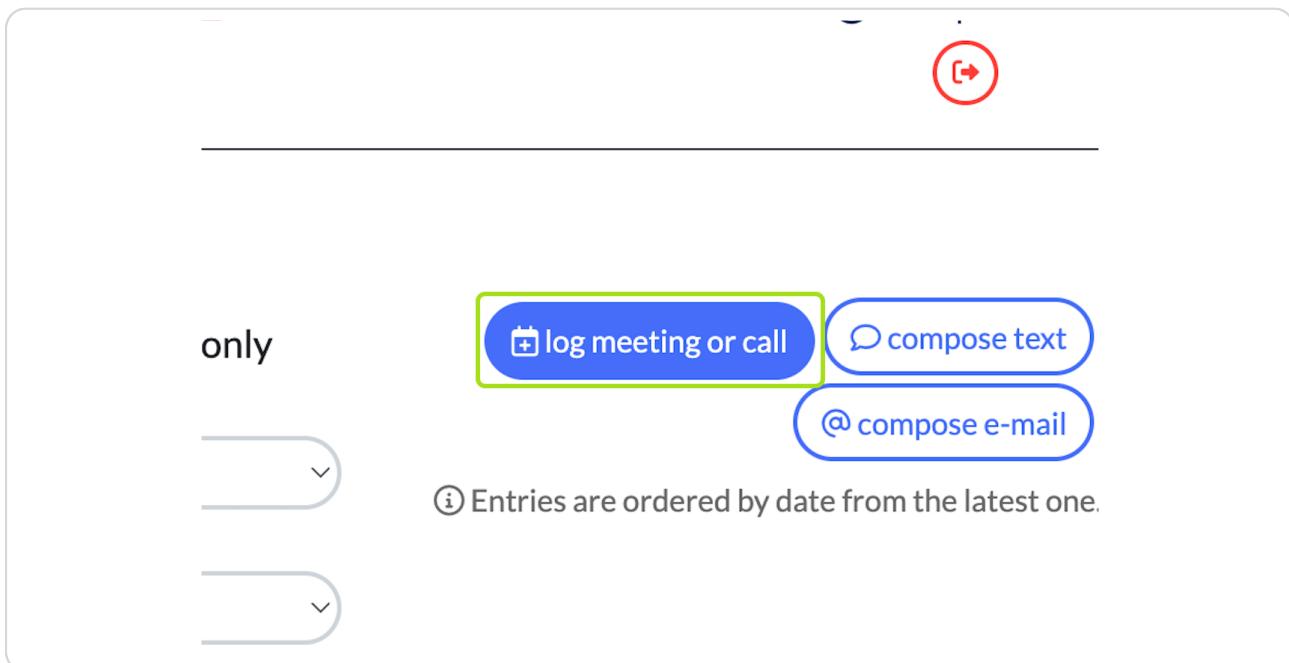
## STEP 4

The ability to log a meeting or call is on the top right.



## STEP 5

Click on log meeting or call



## STEP 6

Set a date of the call or meeting, this can be future or past

New meeting or call

Start date:  11 : 49 →

Locations: (choose location)

Attendees: Staff:  +

• Principal Admin PA ✓ ⏱ ✎ ?

## STEP 7

Set the start time

all

Start date:  11 : 49 → End date:  min  
Duration: < -10 min +10 min

Locations: (choose location)

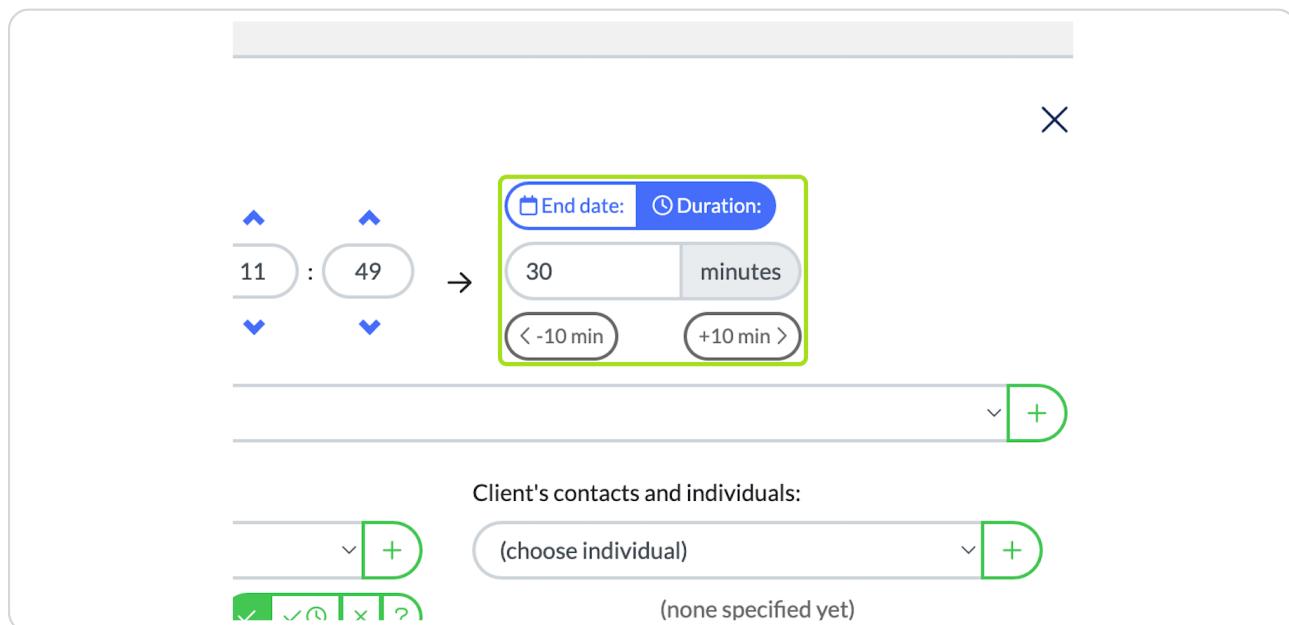
For: Client's contacts and individuals

Attendees:  +

• Principal Admin PA ✓ ⏱ ✎ ? (none)

## STEP 8

### Set how long the meeting or call lasted



End date: Duration:

30 minutes

< -10 min > +10 min

Client's contacts and individuals:

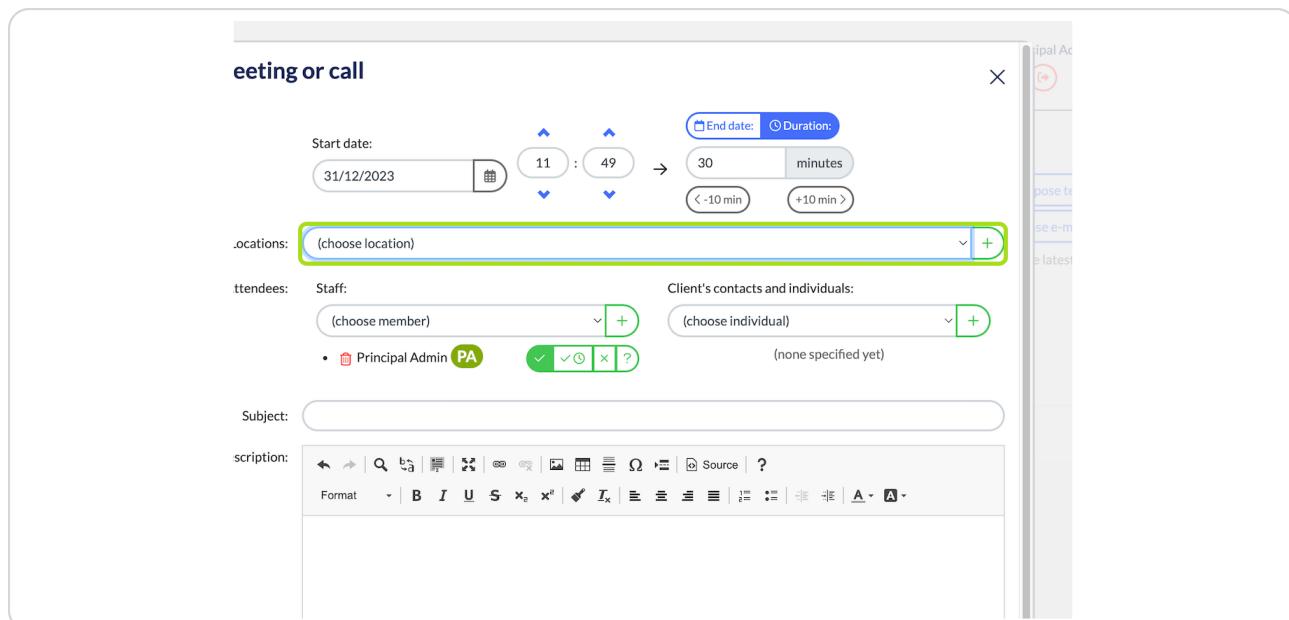
(choose individual)

(none specified yet)

## STEP 9

### Click on choose location to record where the meeting happened or how the call happened

You can add to the location list in settings



Meeting or call

Start date: 31/12/2023 End date: Duration: 30 minutes

Attendees: Staff: (choose member) Principal Admin PA Client's contacts and individuals: (choose individual) (none specified yet)

Subject:

Description:

Format: B I U S x x<sup>2</sup> T<sub>x</sub> L L L L L L L L A A

## STEP 10

Click on Staff to record which staff members are in the call or meeting

New meeting or call

Start date: 31/12/2023 End date: 30 Duration: 49 minutes

Locations: (choose location)

Attendees: Staff: (choose member) + Client's contacts and individuals: (choose individual)

Subject: Principal Admin PA

Description: (none)

Format: B I U S x x<sup>a</sup> Ix

## STEP 11

Click on Client's contacts and individuals to add who was attending from the client side

49 minutes → 30 minutes

< -10 min +10 min >

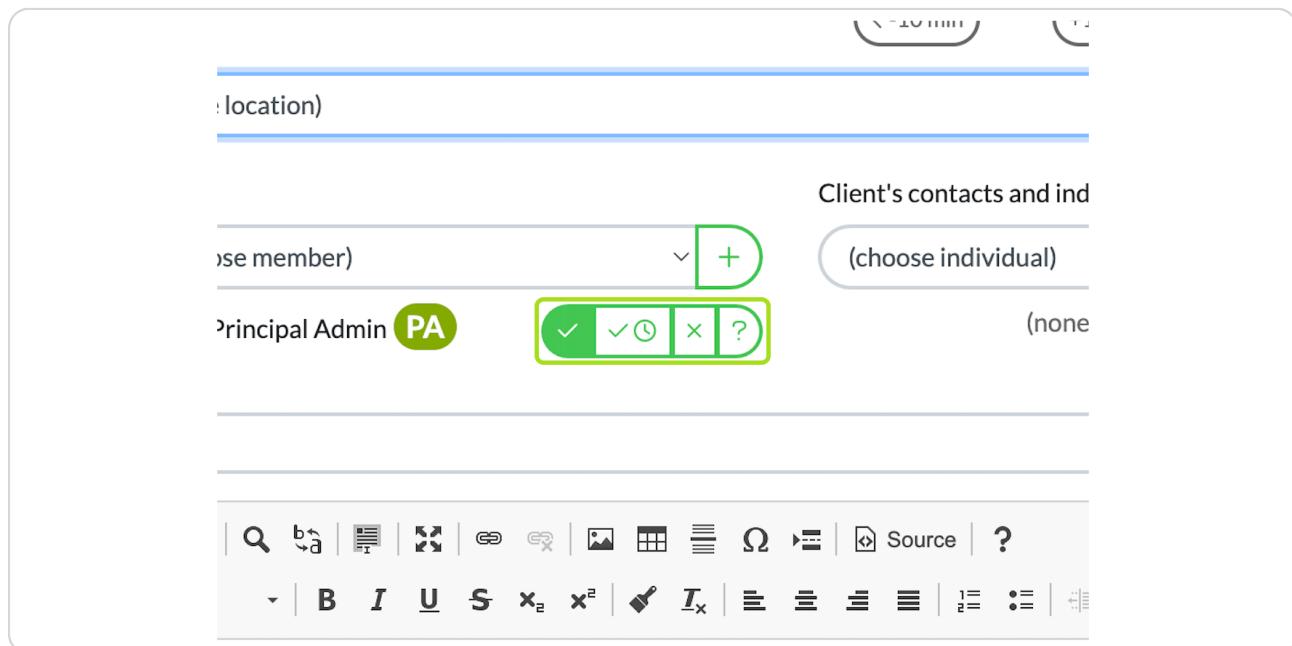
Client's contacts and individuals: (choose individual) +

(none specified yet)

Source

## STEP 12

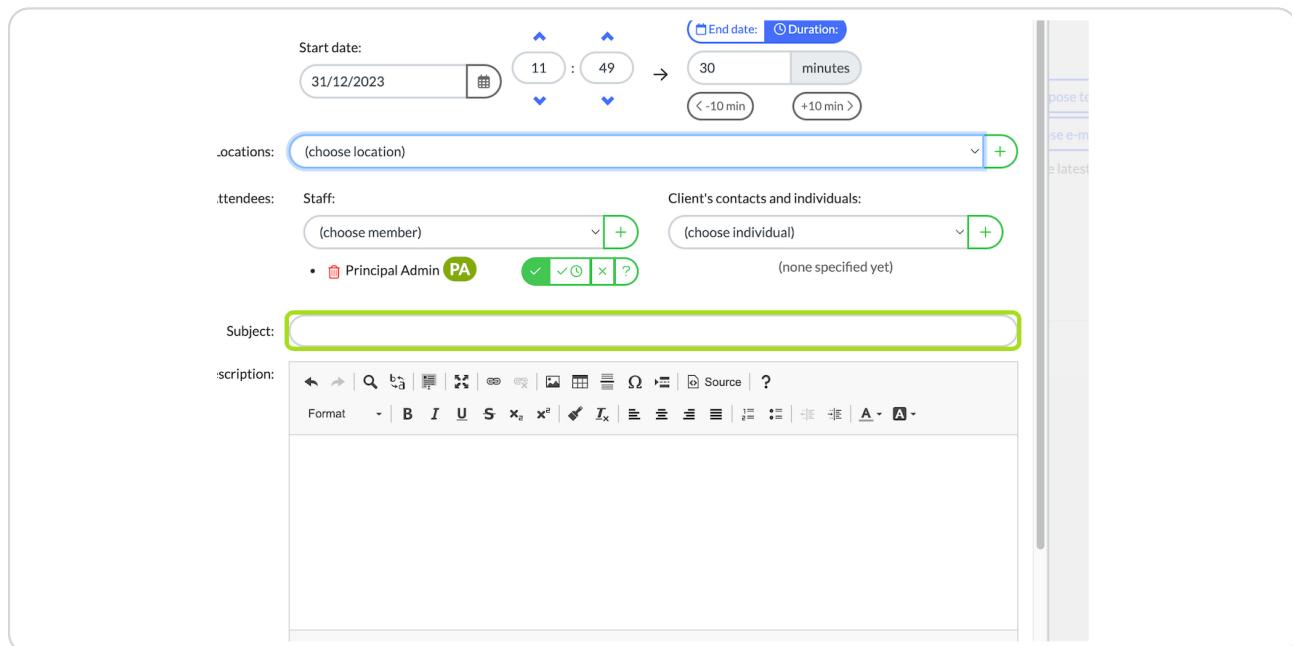
In the highlighted section you can record if the person attended, didnt attend or was late, if late by how long.



The screenshot shows a software interface for managing contacts. At the top, there is a search bar and a 'location' dropdown. Below this, a list of contacts is displayed, with the first entry being 'Principal Admin PA'. To the right of the contact list is a 'Client's contacts and individuals' section with a 'choose individual' dropdown and a green '+' button. Below the contact list is a toolbar with various icons for search, filters, and other functions. The entire interface is enclosed in a light blue border.

## STEP 13

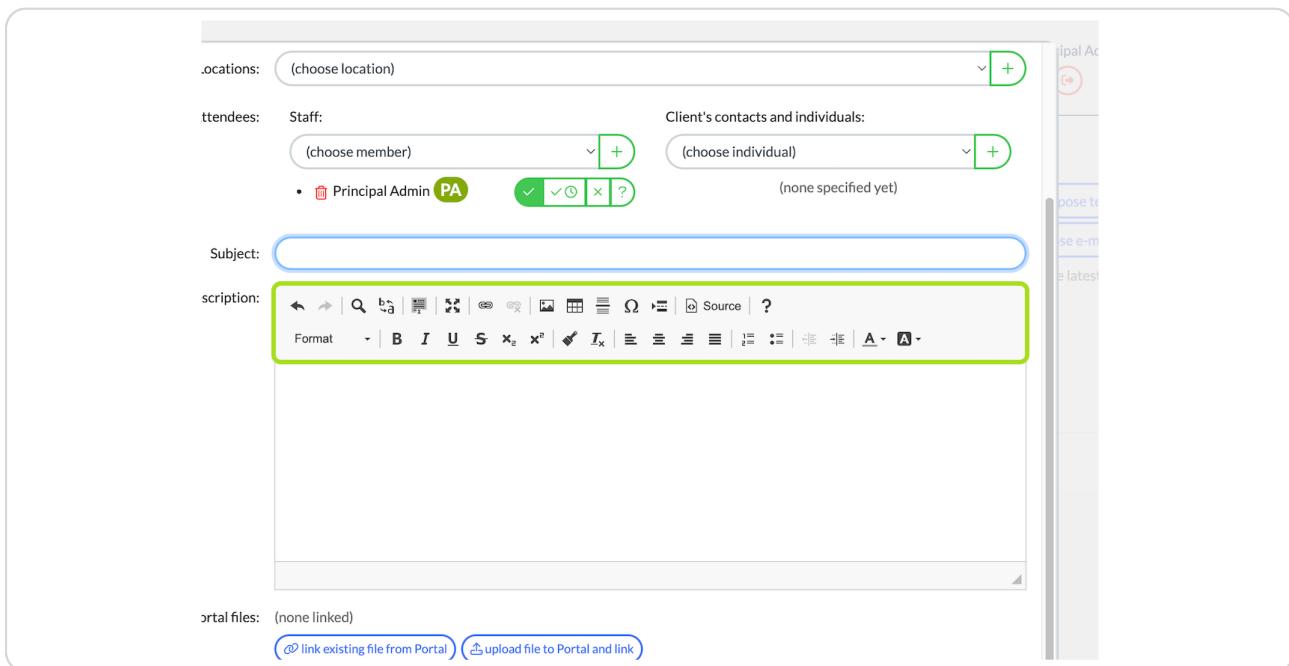
Click on Subject and enter subject of the meeting or call



The screenshot shows a software interface for scheduling a meeting. At the top, there are fields for 'Start date' (31/12/2023) and 'End date' (30 minutes later). Below these are fields for 'locations' (choose location) and 'Attendees' (choose member). The 'Attendees' field shows 'Principal Admin PA' with a green '+' button. To the right, there is a 'Client's contacts and individuals' section with a 'choose individual' dropdown and a green '+' button. Below these fields is a 'Subject' field, which is highlighted with a green border. At the bottom, there is a 'Description' field with a toolbar for rich text editing. The entire interface is enclosed in a light blue border.

## STEP 14

Click on description to add details, minutes agenda etc to the record



locations: (choose location) [+]

Attendees: Staff: (choose member) [+] Client's contacts and individuals: (choose individual) [+]  
• Principal Admin PA [✓] [x] [?] (none specified yet)

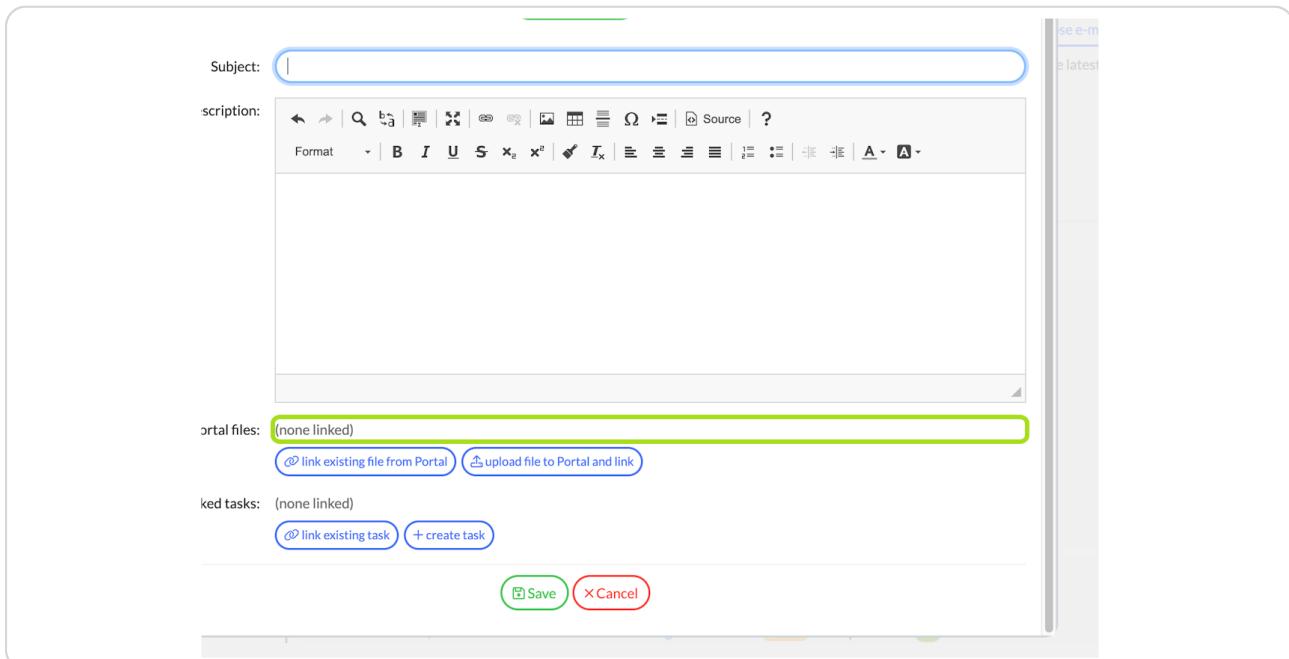
Subject:

Description:   
Format [B] [I] [U] [S] [x] [x] [Tx] [list] [list] [list] [list] [list] [list] [list] [list] [A] [A]

Portal files: (none linked)  
[link existing file from Portal] [upload file to Portal and link]

## STEP 15

Click on link documents to save documents to the meeting record



Subject:

Description:   
Format [B] [I] [U] [S] [x] [x] [Tx] [list] [list] [list] [list] [list] [list] [list] [list] [A] [A]

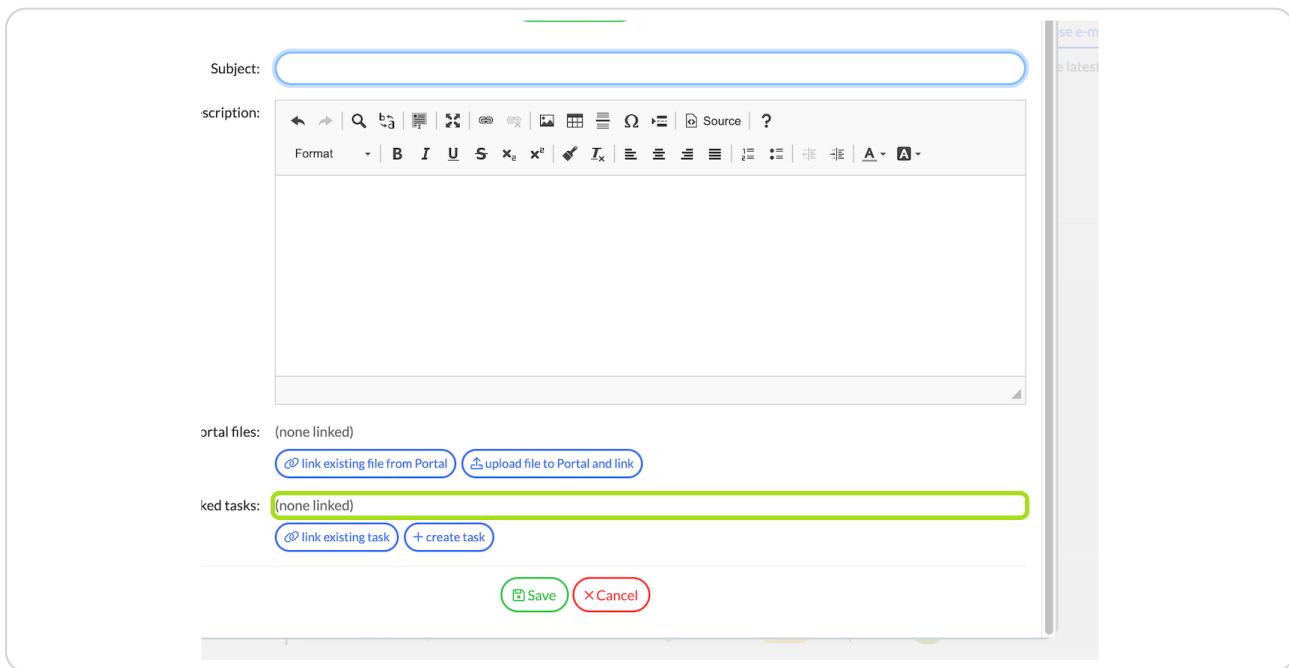
Portal files: (none linked)  
[link existing file from Portal] [upload file to Portal and link]

Linked tasks: (none linked)  
[link existing task] [+ create task]

[Save] [Cancel]

## STEP 16

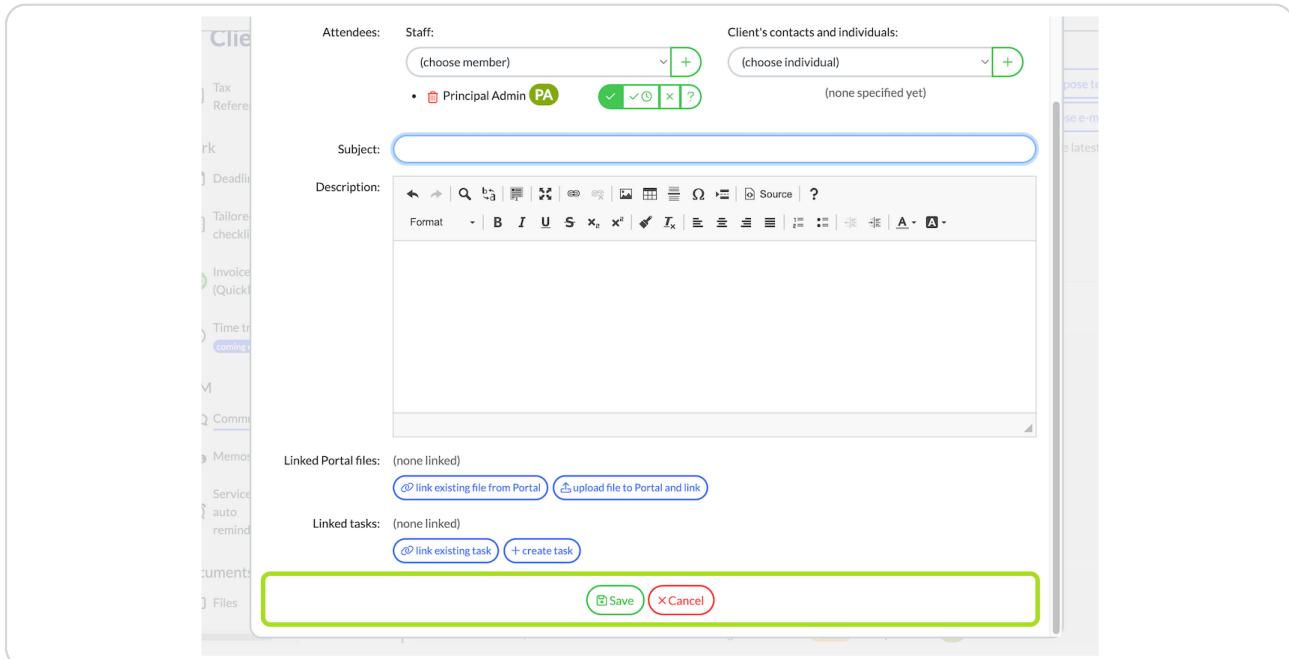
Click on link or create task to create tasks of the back of this meeting or call



This screenshot shows a software interface for creating a new meeting. The 'Linked tasks' section is highlighted with a yellow box. It contains a list box showing '(none linked)' and two buttons: '+ link existing task' and '+ create task'. Below this section are 'Save' and 'Cancel' buttons.

## STEP 17

Click on Save to record the meeting



This screenshot shows the same meeting creation form as the previous one, but the 'Save' button is highlighted with a yellow box. The 'Attendees' and 'Description' sections are also visible.

*Tango*

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