

# Managing Active Clients: Client Engagement and Communication Review

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Created by

Johann Goree

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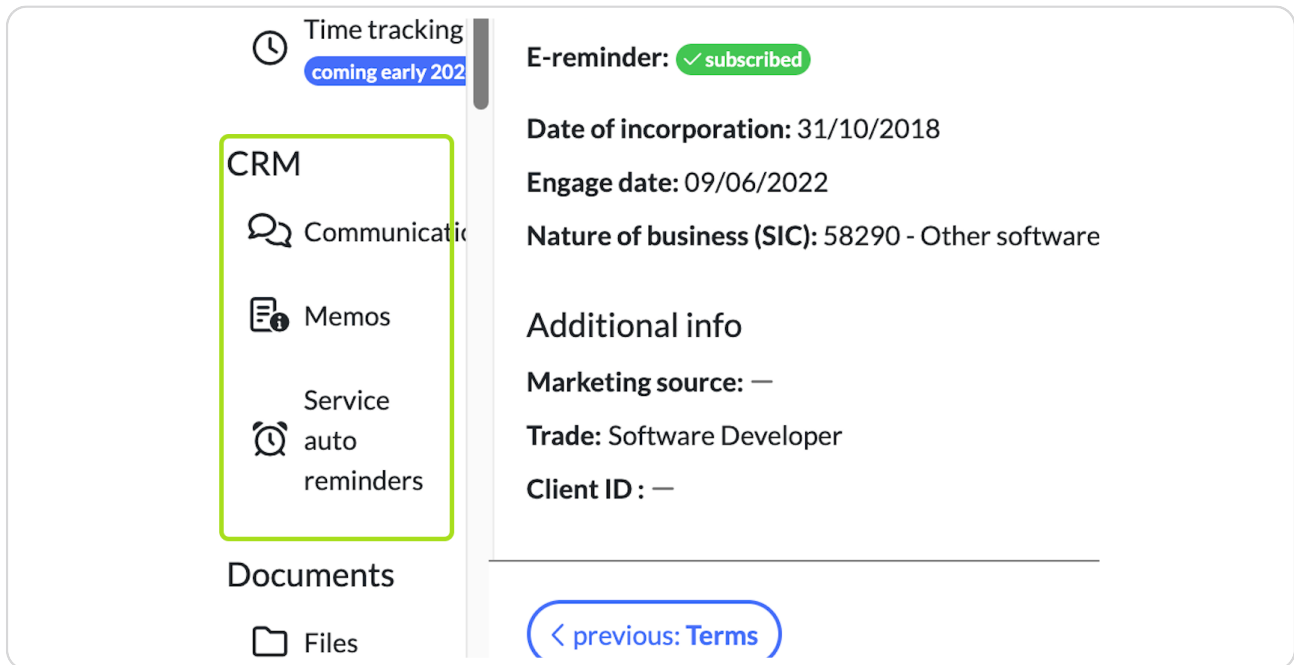
## STEP 1

### Click on Client Engager Online Limited

<input type="checkbox"/>	Andy Wainwright  	Individual or Sole Trader	(not linked)	not started
<input type="checkbox"/>	Client Engager Online Limited  	Limited Company	(in progress)	N/A

## STEP 2

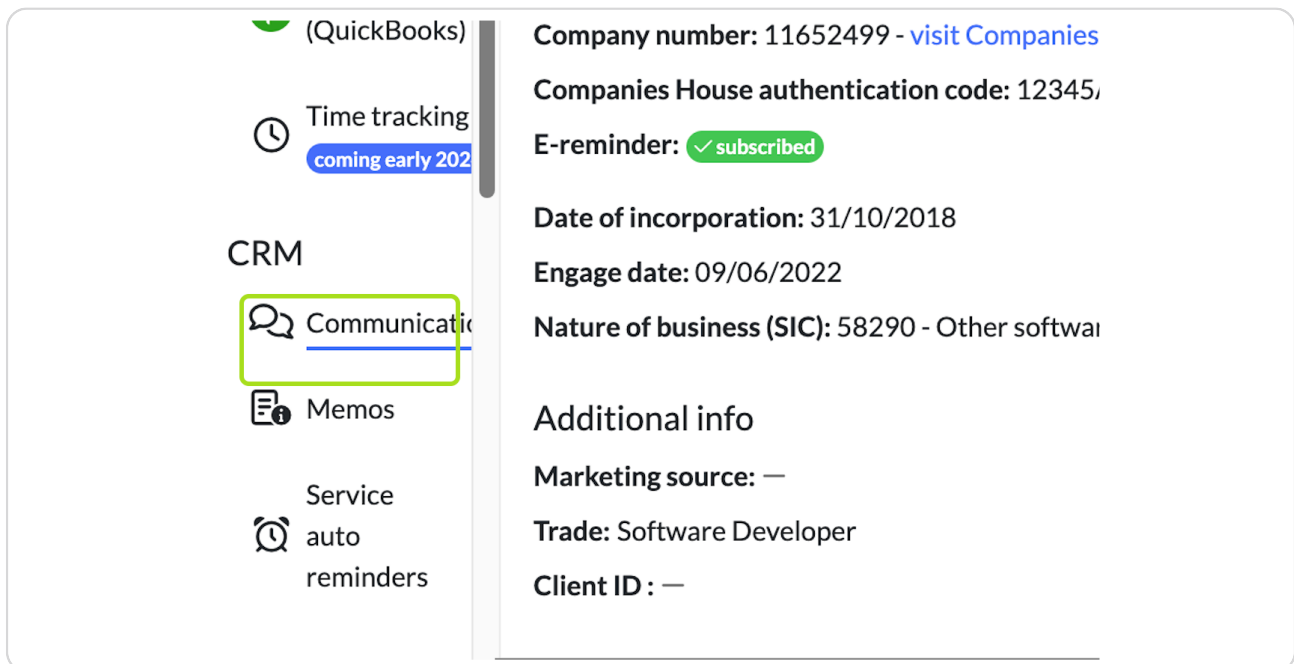
### The logs are under CRM



The screenshot shows a sidebar menu on the left with the following items: Time tracking (with a clock icon and a blue badge saying 'coming early 2022'), CRM (highlighted with a green box), Communication (with a speech bubble icon), Memos (with a notepad icon), Service auto reminders (with a clock icon), and Documents (with a folder icon). The main content area on the right displays the following information: 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, and Client ID: —. At the bottom right, there is a blue button with a left arrow and the text '< previous: Terms'.

## STEP 3

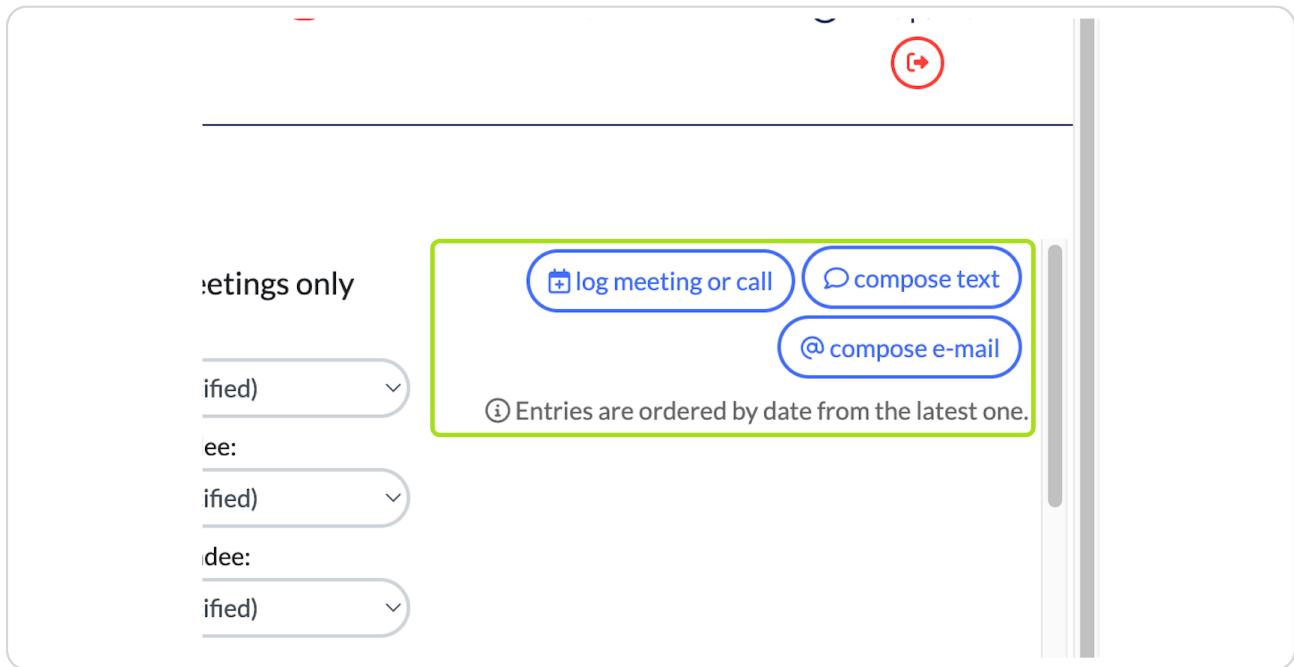
### Click on Communication



The screenshot shows the same sidebar menu as in Step 2, but now the 'Communication' item (with a speech bubble icon) is highlighted with a green box. The main content area on the right displays the following information: 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, and Client ID: —.

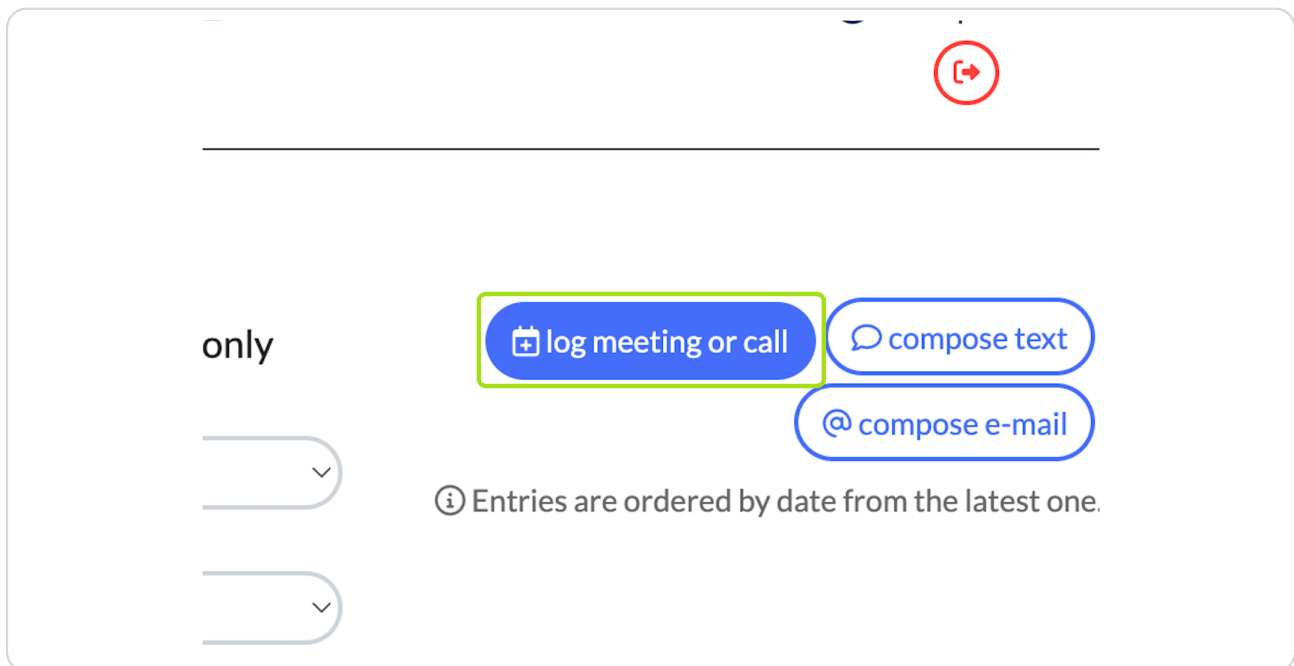
#### STEP 4

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:

31/12/2023

11

:

49

→

Locations: (choose location)

Attendees: Staff:

(choose member)

✓ +

• Principal Admin

✓ ✓ ⌚ × ?

## STEP 7

Set the start time

### all

Start date:

31/12/2023

11

:

49

→

End date:

Duration

30

min

< -10 min

+10 min

Locations: (choose location)

Staff:

(choose member)

✓ +

• Principal Admin

✓ ✓ ⌚ × ?

Client's contacts and individuals

(choose individual)

(none selected)

## Set how long the meeting or call lasted

11 : 49 →

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

**Scheduling or call**

Start date:  31/12/2023

Time:  11 :  49 →  30 minutes

End date:  Duration:

< -10 min +10 min >

Locations:  (choose location)

Addendees: Staff:  (choose member)    
• Principal Admin PA ✓ ✓ ⏸ ✕ ? Client's contacts and individuals:  
 (choose individual)    
(none specified yet)

Subject:

Description: 

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## 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 11:49 → 30 minutes  
< -10 min > +10 min

Locations: (choose location)

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

• Principal Admin PA ✓ ✓ ⌚ ✕ ? (none specified yet)

Subject:

Description: 


## STEP 11

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

49 → 30 minutes  
< -10 min > +10 min

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

(none specified yet)

Rich text editor toolbar: 

## 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 meeting form with a highlighted section for recording attendance. The section includes a dropdown menu for 'Client's contacts and individuals' with a '+' button. Below it, a list of attendees is shown, with 'Principal Admin' (PA) highlighted. To the right of the name is a row of five icons: a green checkmark, a green checkmark with a clock, a red X, and a question mark. The first icon is highlighted with a green box. Below the list is a rich text editor with various formatting options like bold, italic, underline, and link.

## STEP 13

Click on Subject and enter subject of the meeting or call

The screenshot shows a meeting form with various fields. At the top, there are date and time pickers for 'Start date' (31/12/2023) and 'End date' (11:49). Below these are buttons for '< -10 min' and '+10 min >'. The 'Locations' field is set to '(choose location)'. The 'Attendees' section has two columns: 'Staff' and 'Client's contacts and individuals'. Under 'Staff', 'Principal Admin' (PA) is listed with a green checkmark icon. Under 'Client's contacts and individuals', there is a '(choose individual)' dropdown. The 'Subject' field is highlighted with a green box. Below the subject field is a rich text editor with various formatting options like bold, italic, underline, and link.



## STEP 14

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

The screenshot shows a meeting record form with the following fields and options:

- Locations:** (choose location) with a dropdown arrow and a green plus icon.
- Attendees:**
  - Staff:** (choose member) with a dropdown arrow and a green plus icon.
  - Client's contacts and individuals:** (choose individual) with a dropdown arrow and a green plus icon.
  - A list of attendees: Principal Admin (PA) with a green checkmark, a green circle with a checkmark, a green circle with a question mark, and a green circle with an 'X'.
  - (none specified yet)
- Subject:** A text input field.
- Description:** A text area with a rich text editor toolbar. The toolbar includes icons for undo, redo, search, bold, italic, underline, strikethrough, link, unlink, image, table, list, link, source, and help. The description field is highlighted with a green box.
- Portal files:** (none linked) with two buttons: "link existing file from Portal" and "upload file to Portal and link".

## STEP 15

Click on link documents to save documents to the meeting record

The screenshot shows the same meeting record form as in Step 14, but with the following changes:

- Subject:** A text input field.
- Description:** A text area with a rich text editor toolbar.
- Portal files:** (none linked) with two buttons: "link existing file from Portal" and "upload file to Portal and link". The portal files field is highlighted with a green box.
- Linked tasks:** (none linked) with two buttons: "link existing task" and "+ create task".
- Buttons:** "Save" (green) and "Cancel" (red) buttons are visible at the bottom.

## STEP 16

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

The screenshot shows a form for creating a meeting or call. The 'Subject' field is at the top. Below it is the 'Description' section, which includes a rich text editor with a toolbar containing icons for undo, redo, search, bold, italic, underline, strikethrough, link, unlink, text color, background color, bulleted list, numbered list, indent, outdent, and font size. Below the editor are two sections: 'Portal files: (none linked)' and 'Linked tasks: (none linked)'. Each section has two buttons: 'link existing file from Portal' and 'upload file to Portal and link' for files, and 'link existing task' and '+ create task' for tasks. At the bottom right of the form are 'Save' and 'Cancel' buttons. A green box highlights the 'Linked tasks' section and the 'Save' button.

## STEP 17

Click on Save to record the meeting

The screenshot shows a form for creating a meeting or call. The 'Attendees' section is at the top, with 'Staff' and 'Client's contacts and individuals' dropdowns. The 'Staff' dropdown has a list of members, including 'Principal Admin' with a green checkmark. The 'Client's contacts and individuals' dropdown has a list of individuals, including 'Principal Admin' with a green checkmark. Below the attendees section is the 'Subject' field. Below the subject field is the 'Description' section, which includes a rich text editor with a toolbar containing icons for undo, redo, search, bold, italic, underline, strikethrough, link, unlink, text color, background color, bulleted list, numbered list, indent, outdent, and font size. Below the editor are two sections: 'Linked Portal files: (none linked)' and 'Linked tasks: (none linked)'. Each section has two buttons: 'link existing file from Portal' and 'upload file to Portal and link' for files, and 'link existing task' and '+ create task' for tasks. At the bottom right of the form are 'Save' and 'Cancel' buttons. A green box highlights the 'Linked tasks' section and the 'Save' button.

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