

Setting up default terms

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

Created by	Creation Date	Last Updated
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STEP 1

Click on Default Terms & Privacy

 **Client Engager** [Home](#) [Dashboard](#) [Clients](#) [Email](#)

Practice details

 [Company Information](#)

 [Default Terms & Privacy](#)

Documents

 Document layout

 Document templates

Company Info

Firm Name:

Sender name for texting:

Company Number:

Is VAT registered:

STEP 2

Enter Default Director/partner

ails 2Deadlines ▾InvoicesSettingsHelp 🔍

Principal Admin

+ ▾

🔔 0

🔗

S

Terms of business that apply to all clients by default.

: Helen Brown (HB) ▾

: Principal Admin (PA) ▾

: 7

: 8

:

STEP 3

Set payment terms

ails 2Deadlines ▾InvoicesSettingsHelp 🔍

Principal Admin

+ ▾

🔔 0

🔗

S

Terms of business that apply to all clients by default.

: Helen Brown (HB) ▾

: Principal Admin (PA) ▾

: 7 ▴ ▾

: 8

:

: data@example.com

STEP 4

Set data protection office

· Heleen Brown (HB) ✓

: Principal Admin (PA) ✓

: 7/ ✓

: 8

: ✓

| data@example.com

: 7

: 7

STEP 5

enter email address

· Principal Admin (PA) ✓

: 7

: 8

: ✓

| data@example.com

: 7

: 7

ing

enter number of days your policy gives to respond to data protection requests

:

8

:

▼

!

data@example.com

:

7

▲▼

3

7

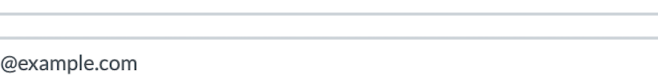
:

ing

External data sources

External data sources

Enter number of years your store data



The screenshot shows a web form with four input fields. The first field is empty. The second field contains the text "data@example.com". The third field contains the number "7" and is highlighted with a blue border. The fourth field contains the number "7" and is highlighted with a green border.

ing

External data sources

Individual or Sole Trader

all cloud

A list below should contain all data

External data sources

other types of clients

A list below should contain all data

STEP 8

Select all softwares and places you use so that the privacy policy reflects the correct softwares

House updates

ts

nal IDs

ation

nplates

PRIVACY NOTICE after a sentence

We use certain Cloud based s

to handle your personal data

including...

☒ Client Engager Online

☒ Office 365

☐ Outlook

☐ Gmail

☐ Dropbox

STEP 9

If something you use isn't on the list add it using the add new option
enter text and press the plus symbol

☐ Kashflow

☐ FreeAgent

☒ Taxcalc

☒ Dext - Receipt Bank

☐

☐

☐

☐

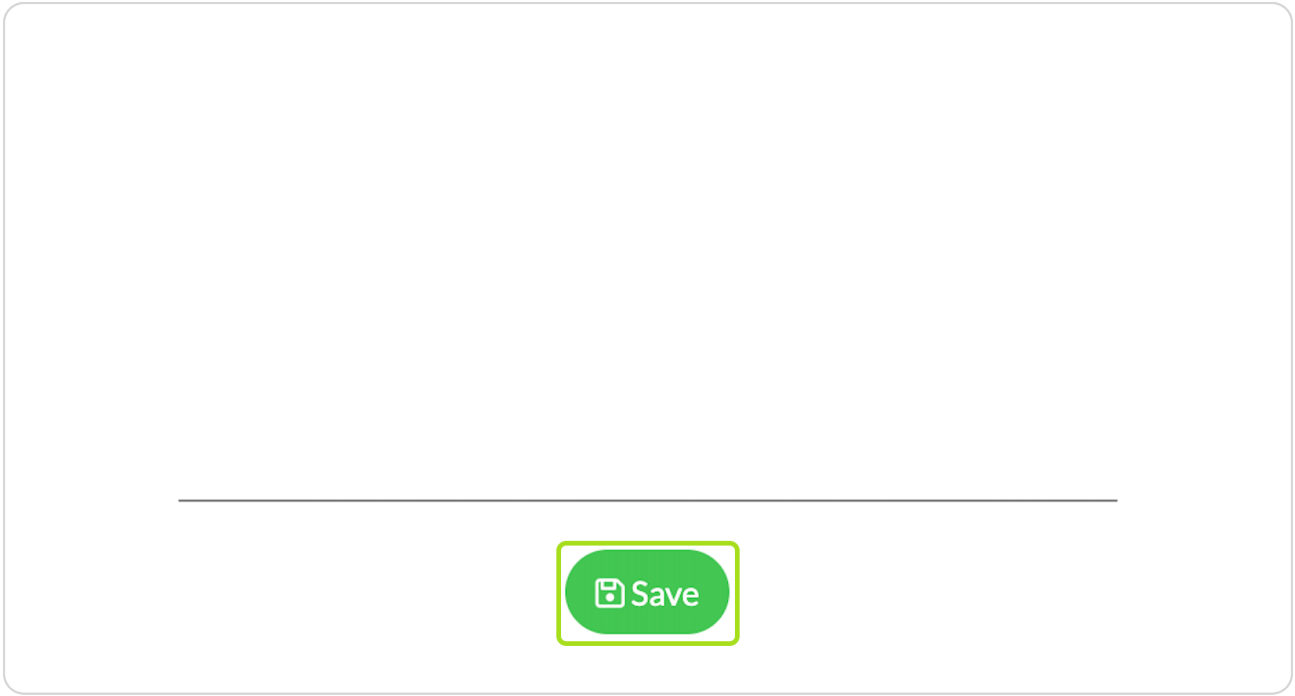
add new:

Test

+

STEP 10

Click on Save



Tango

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