

How to create folders in Client Engager

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

Created by

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Creation Date

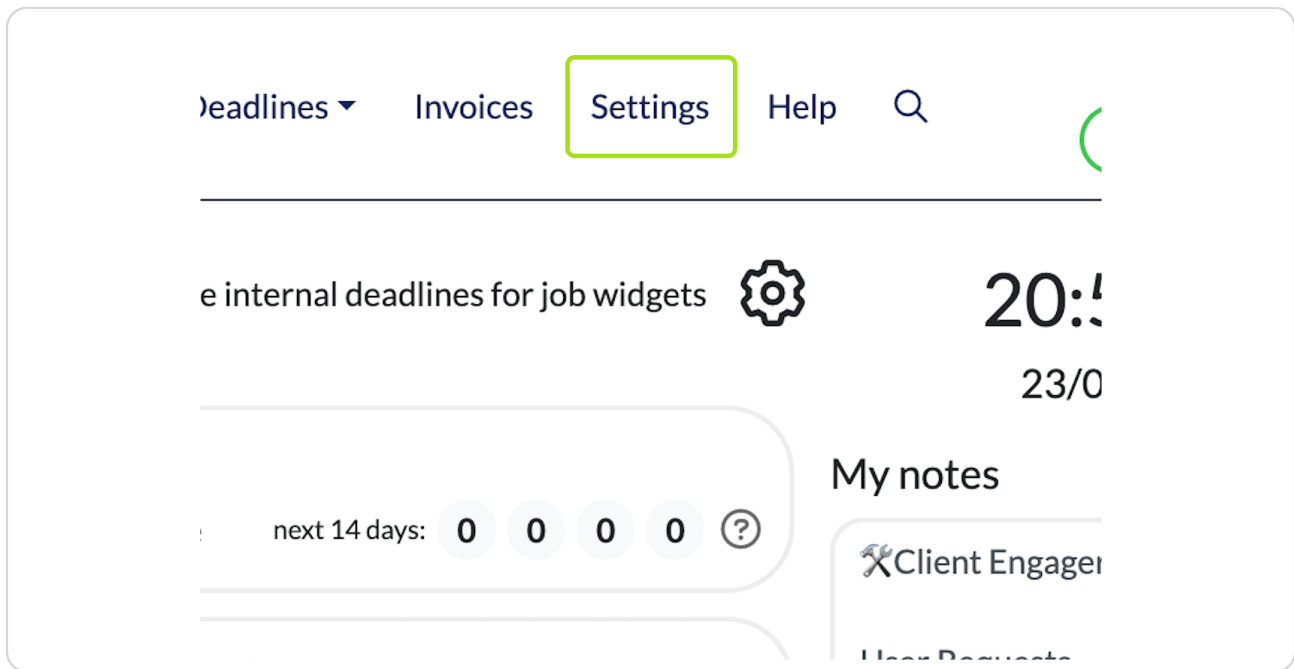
May 23, 2023

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May 23, 2023

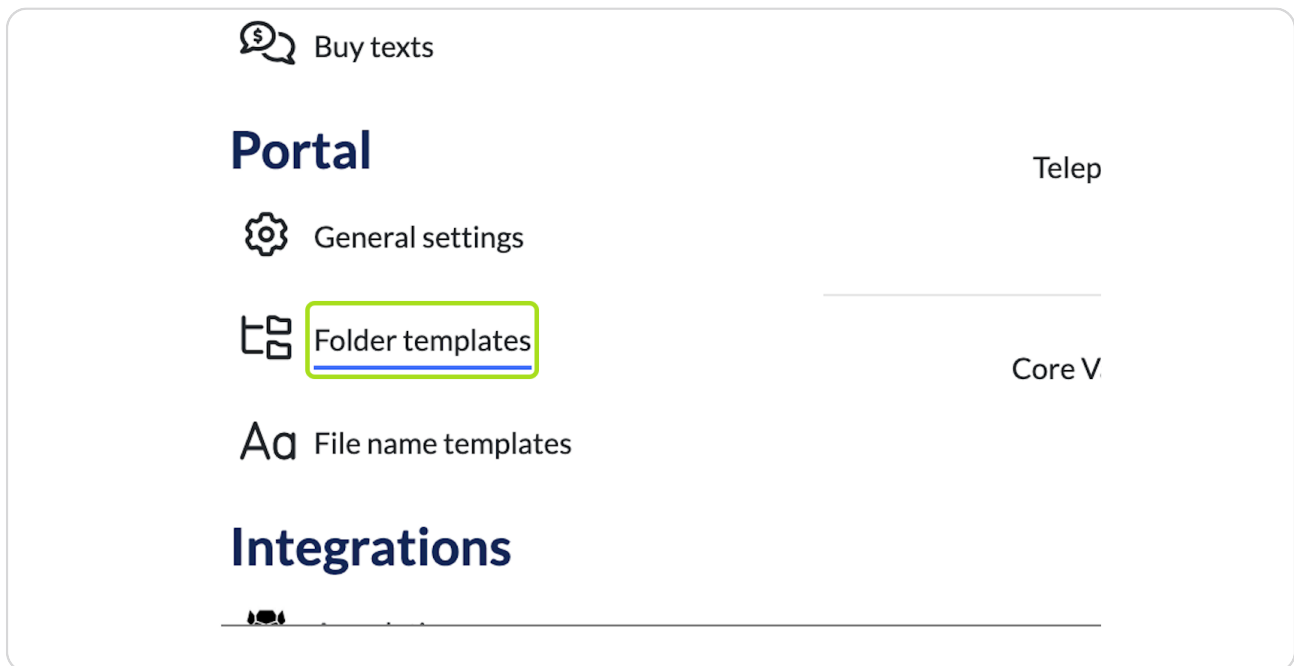
STEP 1

Click on Settings



STEP 2

Click on Folder templates



STEP 3

Select Client type you want to edit folders for

ClientsEmails2DeadlinesInvoicesSettingsHelp

Principal Admin

Folder templates

Folder templates for different client types here. All these folders will automatically show up in each client's portal if you decide to share them.

Client type: Limited Company

Top-level folder

Accountancy Bills

Accounts

2021

2022

2023

2024

STEP 4

To add a totally new folder and substructure, click new top-level folder

Details

Information

Settings & Privacy

5

Logout

Folder templates

Clearance Letters

Folder templates

Define folder templates for different client types | Portal if you decide to share them.

Client type: Limited Company

new top-level folder

Accountancy Bills

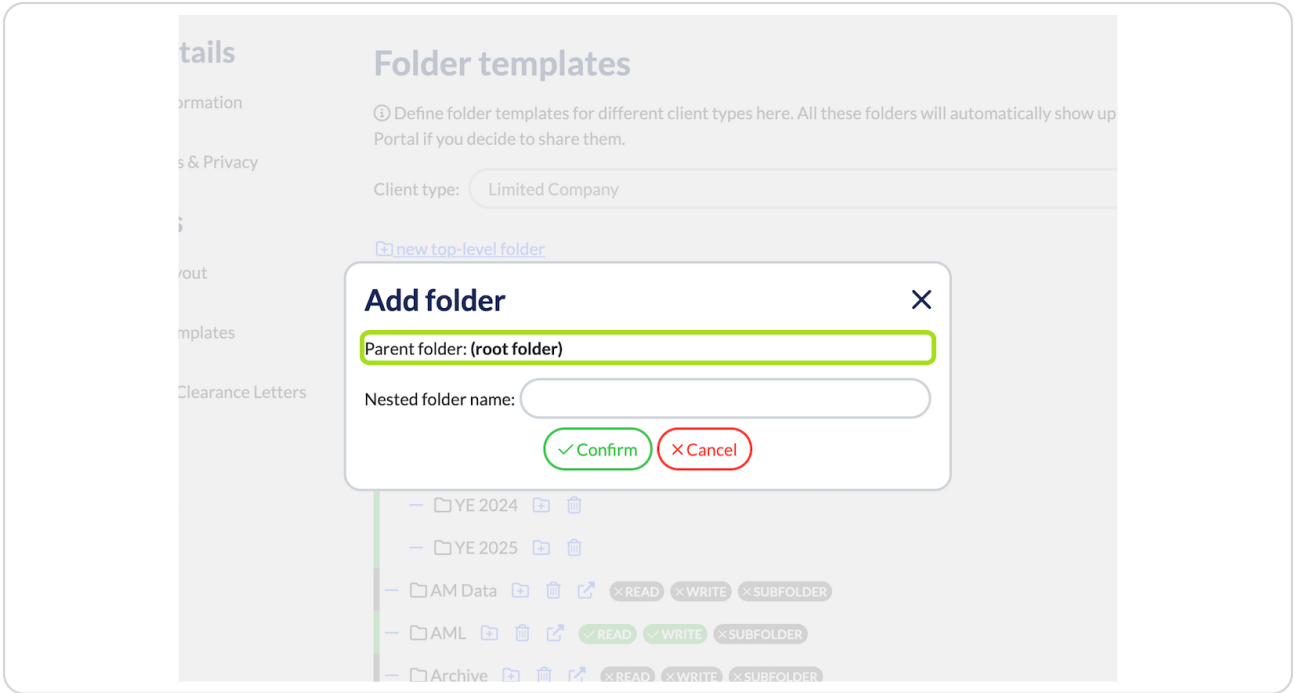
Accounts

2021

2022

STEP 5

Enter new folder name and press confirm



STEP 6

Click permissions to set them

- Read in green - the client can see the folder and the documents in it
- Write in green - the client can add documents
- Subfolder in green - the client can create subfolders
- All Grey - you can use but the folder wont appear in the client portal

templates

er templates for different client types here. All these folders will automatically show u
ecide to share them.

Limited Company

vel folder

ntancy Bills

✓ READ

✕ WRITE

✕ SUBFOLDER

nts

✓ READ

✕ WRITE

✕ SUBFOLDER

2021

2022

2023

2024

Tango

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