

# How to create folders in Client Engager

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

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Created by

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Creation Date

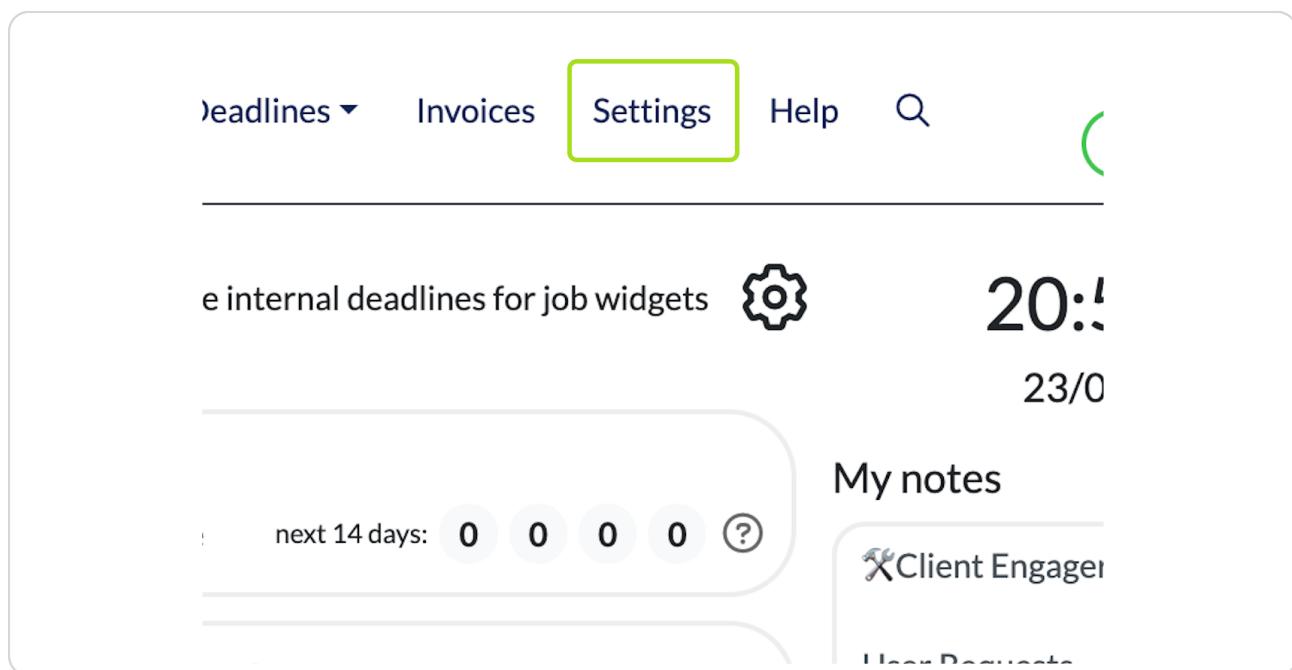
May 23, 2023

Last Updated

May 23, 2023

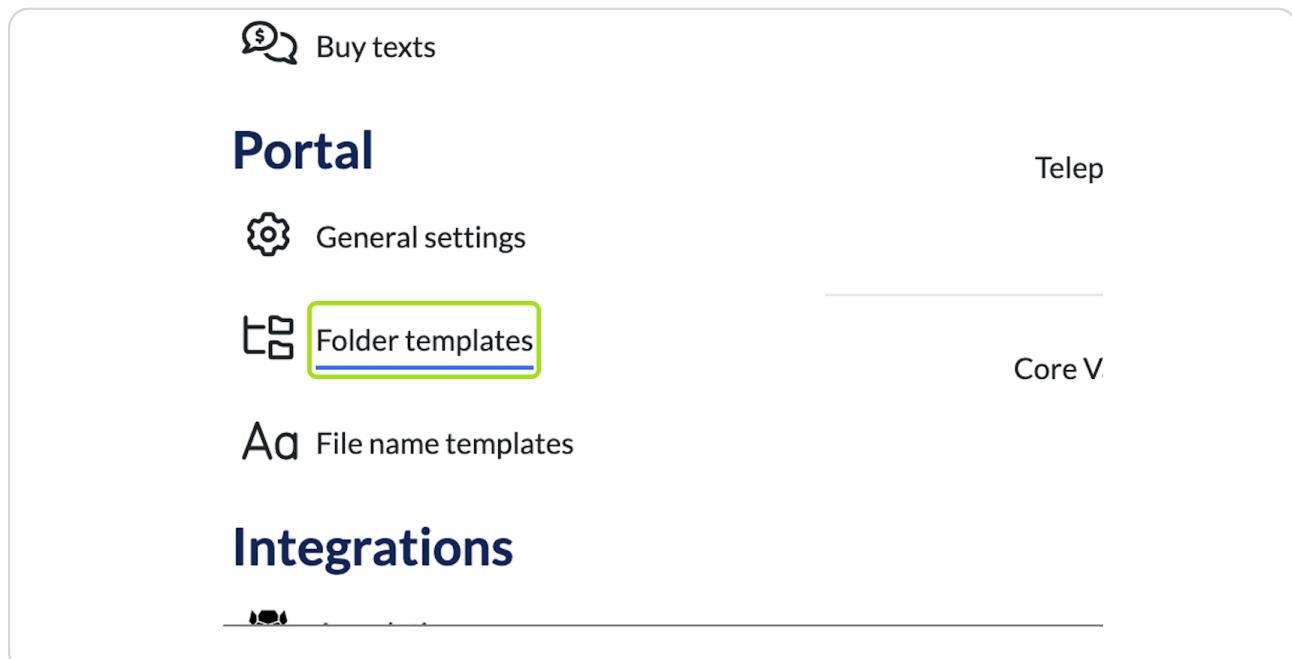
## STEP 1

### Click on Settings



## STEP 2

### **Click on Folder templates**



## STEP 3

### Select Client type you want to edit folders for

er templates

folder templates for different client types here. All these folders will automatically show up in each client's ou decide to share them.

e: Limited Company

top-level folder

- Accountancy Bills [edit] [delete] [share] ✓READ ✗WRITE ✗SUBFOLDER
- Accounts [edit] [delete] [share] ✓READ ✗WRITE ✗SUBFOLDER
- FYE 2021 [edit] [delete]
- FYE 2022 [edit] [delete]
- FYE 2023 [edit] [delete]
- FYE 2024 [edit] [delete]

## STEP 4

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

Details

Information

Consents & Privacy

Clearance Letters

Folder templates

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

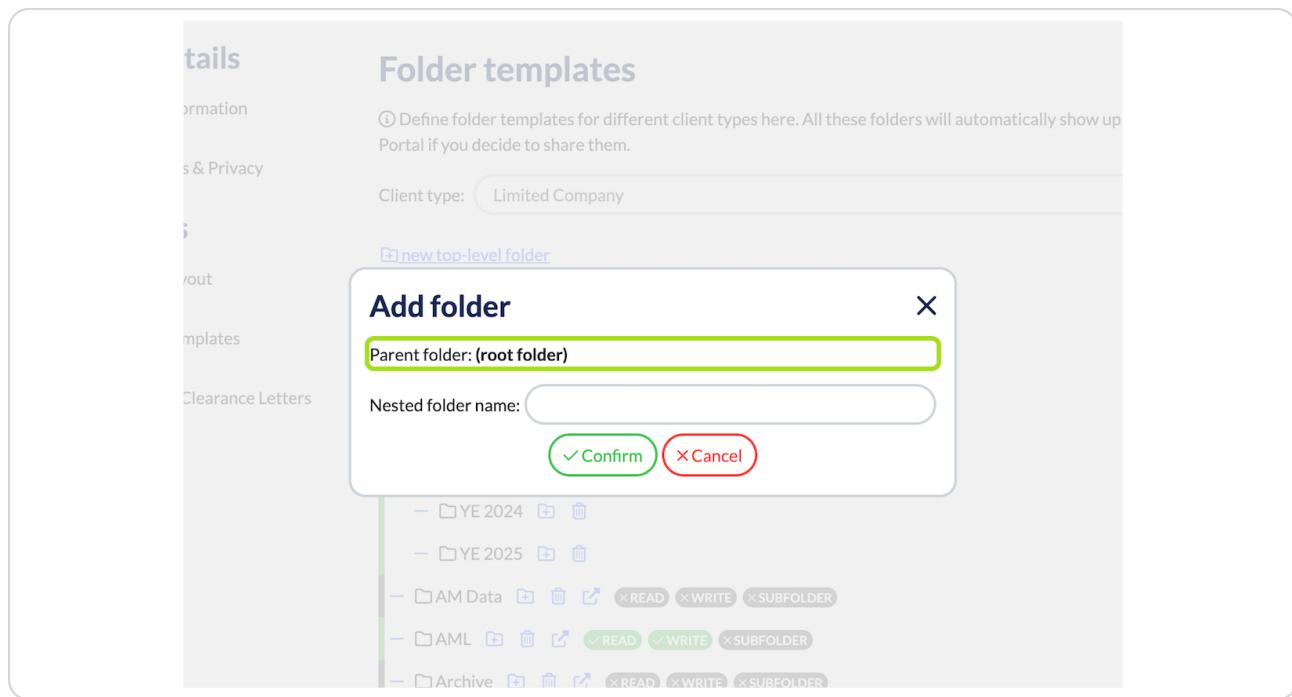
Client type: Limited Company

[new top-level folder](#)

- Accountancy Bills [edit] [delete] [share] ✓READ ✗WRITE ✗SUBFOLDER
- Accounts [edit] [delete] [share] ✓READ ✗WRITE ✗SUBFOLDER
- FYE 2021 [edit] [delete]
- FYE 2022 [edit] [delete]

## 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

Limited Company

2023

2021

2022

2023

2024

# Tango

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