How to set up reminder emails

To set up reminder emails, go to My Office > Staff > Staff Details:

	My office	Select all	Company	Person	Filing		Documents	Companies Hse	Sign out		
	Action Station Workflow Pending events		ETAILS, ACCESS RIGHTS AND DEADLINE EMAIL REMINDER SETTINGS								
	Email				Print & expo	ort					
Edit Staff me	Password and s Settings	ecurity	ail address	Position	Job title	Ref/ Inits	Access level		Deadline email reminders		
Andrew DEVELO			Staff details	Staff				All priveleges of lower configure staff and	r Not sent deadline reminders by email.		
Sam HC	Registered Office Help	e list	Staff-company allocati Staff activity report	on	Developer	SamDev	5. (Default) (Recon all companies and responsibility'	nmended) Full access exchange of 'staff	Not sent deadline reminders by email.		
Elizabet	NEW! ECCTA Up h khodes beini		.nrhodes2607@gmail.com	Staff		ER	5. (Default) (Recon all companies and responsibility'	nmended) Full access exchange of 'staff	Not sent deadline reminders by email.		
Bert SA	MENGO berts	amengo cos	sechosting@gmail.com	Staff			5. (Default) (Recon all companies and responsibility'	nmended) Full access exchange of 'staff	Not sent deadline reminders by email.		
Tim TES STAFF M	TING OLD tim te	esting get	clint@yahoo.co.uk	Staff		π		All priveleges of lower configure staff and	r Not sent deadline reminders by email.		
Abbie Ti	ESTNAME abites	st abl	pie@test.uk	Staff		AST	1. View only acces	s to all companies	Sent deadline email reminders for all companies. Reminders for all types of		

Click on the green edit pencil next to your name:

	My office	Select all	Company	Person	Filing		Documents	Companies Hse	Sign out	
	STAFF DETAILS, ACCESS RIGHTS AND DEADLINE EMAIL REMINDER SETTINGS									
					Print & expo	ort				
Edit	Staff member	User name (for signing in)	Email address	Position	Job title	Ref/ Inits	Access level		Deadline email reminders	
	Andrew DEVELOPER	andyatbtc	andrew.prewett@gmail.com	Staff				All priveleges of lower configure staff and	er Not sent deadline reminders by email.	
	Sam HOPKINSON	samsamsam	sam@hop.com	Manager	Developer	SamDev	5. (Default) (Recon all companies and responsibility'	nmended) Full access exchange of 'staff	to Not sent deadline reminders by email	
0	Elizabeth RHODES	bethrhodes	bethrhodes2607@gmail.com	Staff		ER		nmended) Full access exchange of 'staff	to Not sent deadline reminders by email	
	Bert SAMENGO	bertsamengo	cosechosting@gmail.com	Staff			5. (Default) (Recon all companies and responsibility	nmended) Full access exchange of 'staff	to Not sent deadline reminders by email	
	Tim TESTING OLD STAFF MEMBER	tim testing	getclint@yahoo.co.uk	Staff		тт		All priveleges of lower configure staff and	er Not sent deadline reminders by email	
	Abbie TESTNAME	abitest	abbie@test.uk	Staff		AST	1. View only acces	s to all companies	Sent deadline email reminders for all companies. Reminders for all types of deadlines are sent.	

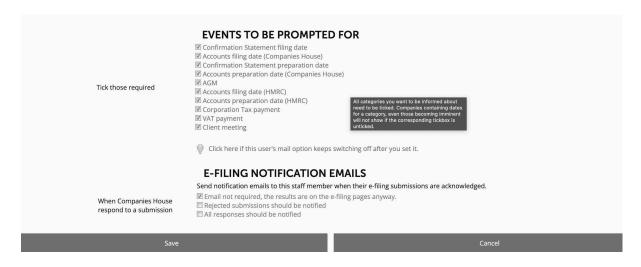
Scroll down to Email reminder options:

Text to match for filtering references (Not case sensitive)	EMAIL REMINDER OPTIONS FOR ABBIE TESTNAME Details Do not send emails to Abbie TESTNAME (default) Send emails to Abbie TESTNAME for companies allocated to: Abbie Testname Send emails for all companies Match any company reference Match any company reference or the staff reference field Match on staff reference field only Match client reference/account number only Match on the three "non-specific" company references only	
	EVENTS TO BE PROMPTED FOR Confirmation Statement filing date Caccounts filing date (Companies House) Confirmation Statement preparation date	
Save	Cancel	

You have many filtering options, you can choose not to receive emails, you can choose to only receive emails for companies allocated to you or someone else, you can also choose to receive emails for all companies.

If you would like to utilise references i.e. Practice references, enter the reference code in the **Text to match for filtering references (Not case sensitive)** field, then tick the option to which you want the reference to match.

Now you can scroll down further and select which events you want to receive emails for, as well as choose which e-filing notification emails you would like to receive:



NOTE: You will only receive one email with everything at the start of the day to avoid any spamming.