





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
<ul style="list-style-type: none"> Action Station Workflow Pending events Email Password and security Settings My account Staff Registered Office list Help NEW! ECCTA Updates 		STAFF DETAILS, ACCESS RIGHTS AND DEADLINE EMAIL REMINDER SETTINGS					
		Print & export					
 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			6. (Administrator) All privileges of lower levels and can also configure staff and settings	Not sent deadline reminders by email.
Sam HOPKINSON	samsamsam	sam@hop.com	Manager	Developer	SamDev	5. (Default) (Recommended) Full access to all companies and exchange of 'staff responsibility'	Not sent deadline reminders by email.
 Elizabeth RHODES	bethrhodes	bethrhodes2607@gmail.com	Staff		ER	5. (Default) (Recommended) Full access to all companies and exchange of 'staff responsibility'	Not sent deadline reminders by email.
Bert SAMENGO	bertsamengo	cosechosting@gmail.com	Staff			5. (Default) (Recommended) Full access to all companies and exchange of 'staff responsibility'	Not sent deadline reminders by email.
Tim TESTING OLD STAFF MEMBER	tim testing	getclint@yahoo.co.uk	Staff		TT	6. (Administrator) All privileges of lower levels and can also configure staff and settings	Not sent deadline reminders by email.
Abbie TESTNAME	abitest	abbie@test.uk	Staff		AST	1. View only access 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 & export					
 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			6. (Administrator) All privileges of lower levels and can also configure staff and settings	Not sent deadline reminders by email.
Sam HOPKINSON	samsamsam	sam@hop.com	Manager	Developer	SamDev	5. (Default) (Recommended) Full access to all companies and exchange of 'staff responsibility'	Not sent deadline reminders by email.
 Elizabeth RHODES	bethrhodes	bethrhodes2607@gmail.com	Staff		ER	5. (Default) (Recommended) Full access to all companies and exchange of 'staff responsibility'	Not sent deadline reminders by email.
Bert SAMENGO	bertsamengo	cosechosting@gmail.com	Staff			5. (Default) (Recommended) Full access to all companies and exchange of 'staff responsibility'	Not sent deadline reminders by email.
Tim TESTING OLD STAFF MEMBER	tim testing	getclint@yahoo.co.uk	Staff		TT	6. (Administrator) All privileges of lower levels and can also configure staff and settings	Not sent deadline reminders by email.
Abbie TESTNAME	abitest	abbie@test.uk	Staff		AST	1. View only access to all companies	Sent deadline email reminders for all companies. Reminders for all types of deadlines are sent.

Scroll down to Email reminder options:

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

Text to match for filtering references (Not case sensitive)

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

Accounts filing date (Companies House)

Confirmation Statement preparation date

Accounts preparation date (Companies House)

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:

EVENTS TO BE PROMPTED FOR

Tick those required

Confirmation Statement filing date

Accounts filing date (Companies House)

Confirmation Statement preparation date

Accounts preparation date (Companies House)

AGM

Accounts filing date (HMRC)

Accounts preparation date (HMRC)

Corporation Tax payment

VAT payment

Client meeting

All categories you want to be informed about need to be ticked. Companies containing dates for a category, even those becoming imminent will not show if the corresponding tickbox is unticked.

Click here if this user's mail option keeps switching off after you set it.

E-FILING NOTIFICATION EMAILS

Send notification emails to this staff member when their e-filing submissions are acknowledged.

Email not required, the results are on the e-filing pages anyway.

Rejected submissions should be notified

All responses should be notified

When Companies House respond to a submission

Save Cancel

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