Email Client Checklist

Emailing client checklist allows you to send your clients their confirmation statement checklist through the software with pre-populated emails. The checklist is also password protected for extra security for you and your client. It will also enable you to keep track of your client checklist progress with the "Emailing & Response" feature which keeps you up to date with the status of the checklist e.g. if your client has opened it, approved it or edited it.You client will also be able to sign of the confirmation statement digitally.

To be able to use this feature you must first set up which contacts (clients) you wish to receive the checklist, this must be done for each company. The email client checklist also uses a number of templates (e.g email text) which you may want to adjust (or leave as the default settings).

Set Up Company Contacts to Receive Checklists

In order for the system to know who to send the client checklist to you'll need to set up a contact/s for each company (you can select up to three contacts).

- Select the desired company by clicking **Company > Select Company,** select company from the drop down menu bar and click **Select**
- Now that a company has been selected go to **Company > Details**
- On the top bar, click **Contact Details**
- Use the drop down menu bar to select the Main contact
- Next select one of the two default email options (both options can be adjusted when you send of the client checklist)
    - Send email with link to download PDF (this will send a download link to the PDF of the client checklist however online sign off will not be available)
    - Send email with link to sign off document (this will send a link to an online document, online sign off will be available)

(Online sign off allows clients to sign off their client checklist in one click as opposed to receiving a downloadable PDF and then emailing it back to you to sign it off)

- You can also select a second and a third contact.
- Click **Save**

N.B The contact must already be loaded into the system as a 'Person'. It is also important to note that within their 'Person' details, their **email address**, **residential address** and **date of birth** must be filled in as these are used to send to the client and to create password security questions for them to gain access to the client checklist. To add a person go to **Person ➢ Add a Person.** If you do not set up a contact for the checklist before attempting to send it the system will realise this and a button will appear on the right hand side (**Setup Email Contact)**, this will allow you to click through to the contact details page for you to enter a contact.

Adjusting Client Checklist Templates (Optional)

To adjust your Client checklist templates go to **My Office > Templates** here you will be presented with the Templates table.When emailing the client checklist there are a number of templates that are used:

- **Client Checklist** (The text that appears on the client checklist that can be edited on the software)
- **Client Checklist Email Text** (The wording in the email that the client will receive that can be edited on the software)

You can either leave the default wording or customise and save your own wording.

To edit the wording of the Client Checklist and the Client Checklist Email Text:

- Click on the green pencil to the left of the desired form.
- Here you will see the default template
- To add a customised template click **Edit Wording**
- Add a Name of the Template e.g John Smiths Customised Checklist
- Add any notes you may want to add
- Next edit any text in the text boxes.

IMPORTANT: MAKE SURE NOT TO DELETE KEYWORD AS THE SYSTEM REQUIRES THEM TO POPULATE THE CHECKLIST AND EMAILS WITH RELEVANT INFORMATION E.G COMPANY NAME, DATES AND ADDRESS

Keywords always end with an X.. They are as follows:

- **DATEX** - displays the Companies House filing deadline, 14 days after the review date.
- **RETURNX** - latest date you would like the clients to return the checklist to you.
- **OFFICERX** - replaced with the "Director" for a company with shares or "Member" for a guarantee company or LLP.
- **GBPX** - replaced with the £ sign if difficulties are found formatting the £ sign without doing this
- **ADDRESSEEX** - will be replaced with the salutation name of the addressee. If a salutation field has been filled in on 'person details' then that will be used otherwise a more formal first name - surname will be used.
- **COMPANYNAMEX** - will be replaced with the name of the company for which the checklist is being sent.
- **DATEX** - displays the Companies House filing deadline, 14 days after the review date.
- **ORGANNAMEX** - will be replaced with the name of your accounting practice.
- **SENDERX** - will be replaced with the name of your chosen sender.
- After you have made your changes click **Save**

- You can switch between any of your customised templates and the default template by clicking the drop down menu bar, selecting you desired template and clicking **Save**

There are also a number of Images you can add to your templates:

- Letter Head Image (this will appear at the top of your checklist. If you choose not to upload your own, your accountancy firm details will appear at the top instead.)
- Email Footer Image (this will appear at the bottom of the email)

Sending Client List

After you have set up your contacts and you are happy with your template settings you are ready to send the client checklist.

- On the systems home page go to **Filing > CS01 Confirmation Statement > Client Checklist**
- When your happy to send the checklist, at the bottom of the page click **Show Checklist**
- You will then be presented with a preview of the checklist. After you are happy with the preview click **Email to Client**
- Next select a recipient (these options will correlate with the contacts you set up in Company Details).
- For each recipient you have the option to either:
    - **Send Email with link to download PDF** (this will send a PDF that they can download make notes and send back)

  Or
    - **Send Email with link to online sign off document** (this will send them a link to the checklist that they will be able to add notes and send it back.

- When you are happy with all the details click **Send email.**
- Click **Continue** to exit the page

Checking Client Checklist Status

After you have sent the client checklist you can check its status by going to:

- **My Office > Client Emailing > Emailing and Responses**
- From here you will be able to see a table with all of the emailed checklists. The table will show you who it was sent to, the time and date of when it was sent and the status of the checklist e.gl:
    - Sent to Client
    - Successful Login
    - PDF Downloaded

- After the client has sent back a completed checklist you can update the checklist status to complete by clicking the pencil to the left of the checklist.
- On this page you will see a preview of the sent checklist and some additional information about the checklist. You can either click **Back** to go back to the table or click **Complete** if they have sent a completed checklist back.
- After the have confirmed and/or made amends which you have updated you can send the confirmation statement to Companies house by
- Go to the Filing tab (located on the top bar) **> CS01 Confirmation Statement > CS01 Confirmation Statement > Submit**

Unblocking Client Checklist

The client will have 5 attempts to enter the security questions correctly to access the client checklist. If they fail 5 times then their checklist will be blocked. There are two ways to resolve this.

- You will receive an email informing you that they have been blocked and allow you to unblock them (if you are confident the block is not due to a hacker attempt)

- Alternatively you can go to **My office > Client Emailing > Unblock Email Sign In**