

How to set up staff email reminders

To set up staff email reminders, go to, **My office > Settings > Automation Settings (Beta) > Organisation Settings:**

My office Select all... Company Person Filing Documents Companies Hse Sign out

Action Station

Workflow

Pending events

Email

Password and security

Settings

My account

Staff

Registered Office list

Help

NEW! ECCTA Updates

WORKFLOW

[a job](#) [Show current company only](#) [Print & export](#)

Details and options	Left	Completion deadline	Days left	Partner	Man	
E-filing presenter ID			3 days	The	Abbi	
Automation Settings (Beta)						
Templates				The	Tim	
Individual Company Settings						
Send for invoicing	22 Mar 2024	1 month overdue	18 Mar 2024	1 month overdue	The Adai	
A Demo Test Company Appoint director	Send for invoicing	13 Mar 2024	1 month overdue	14 Mar 2024	1 month overdue	The Tim
ABC LLP Appoint secretary	Send for invoicing	03 Mar 2024	2 months overdue	07 Feb 2024	3 months overdue	Adai
A Demo Test Company Appoint director	Send for invoicing	13 Feb 2024	2 months overdue	15 Feb 2024	2 months overdue	The Adai
ABC LLP Appoint secretary	Send for invoicing	07 Feb 2024	3 months overdue	09 Feb 2024	2 months overdue	Adai

Customise the relevant fields to your requirement then **Save:**

ORGANISATION AUTOMATION SETTINGS - CLIENT CHECKLIST SETTINGS -

Details

Auto-send Client Checklist

Do not auto-send Client Checklists

Queue checklist emails for manual approval

Automatically email Client Checklists and notify after sending

Display Companies House fee message on Client Checklist

Days before filing when clients are asked to return checklists

Days before filing that checklist automatically gets emailed to client

Auto-send reminder emails

Automatically send reminder emails

Send reminder email if return date missed

Do not send reminder emails by default

Turn off all client reminders - over rides individual company settings.

Upcoming alert emails

Do not send

Send to relevant Partners, Managers and Staff

Send to relevant Managers and Staff

Send to relevant Staff only

Send to specific Staff Member

Auto-send CS01 options

Do not automatically send CS01

Automatically send CS01 on review date upon client approval

Automatically send CS01 immediately upon approval (not recommended)

AUTOMATION EMAIL SETTINGS

 Details

Email Sent From

Staff Member Assigned to Client Company

Person signature in email

Manager Assigned to Client Company

Save

Cancel