

Adding Client Account: Step-by-Step Instructions

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

Created by

Progress Counseling Group

Creation Date

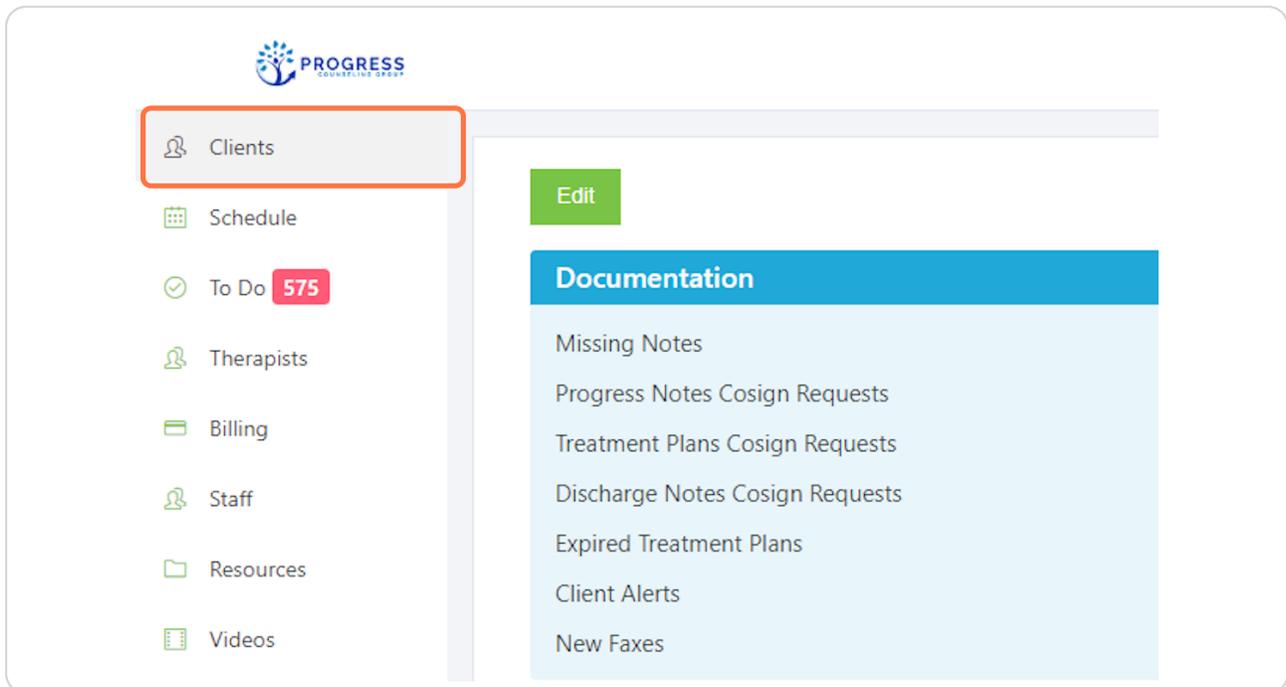
July 16, 2023

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October 21, 2023

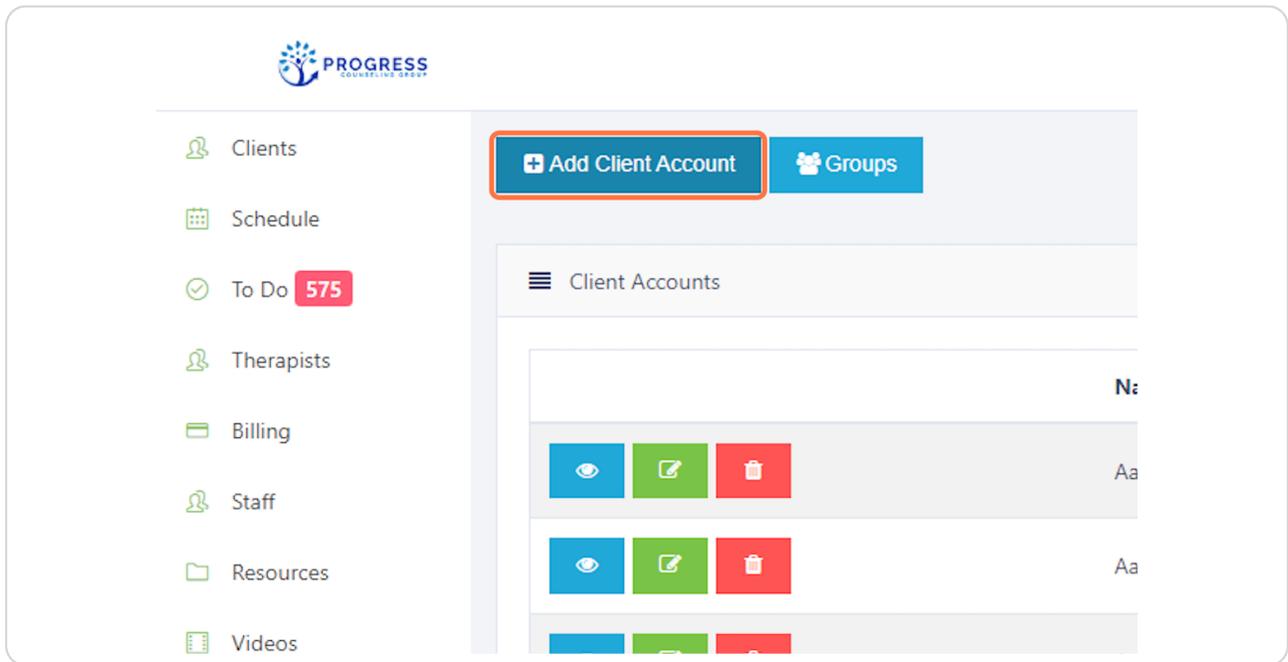
STEP 1

Click on Clients



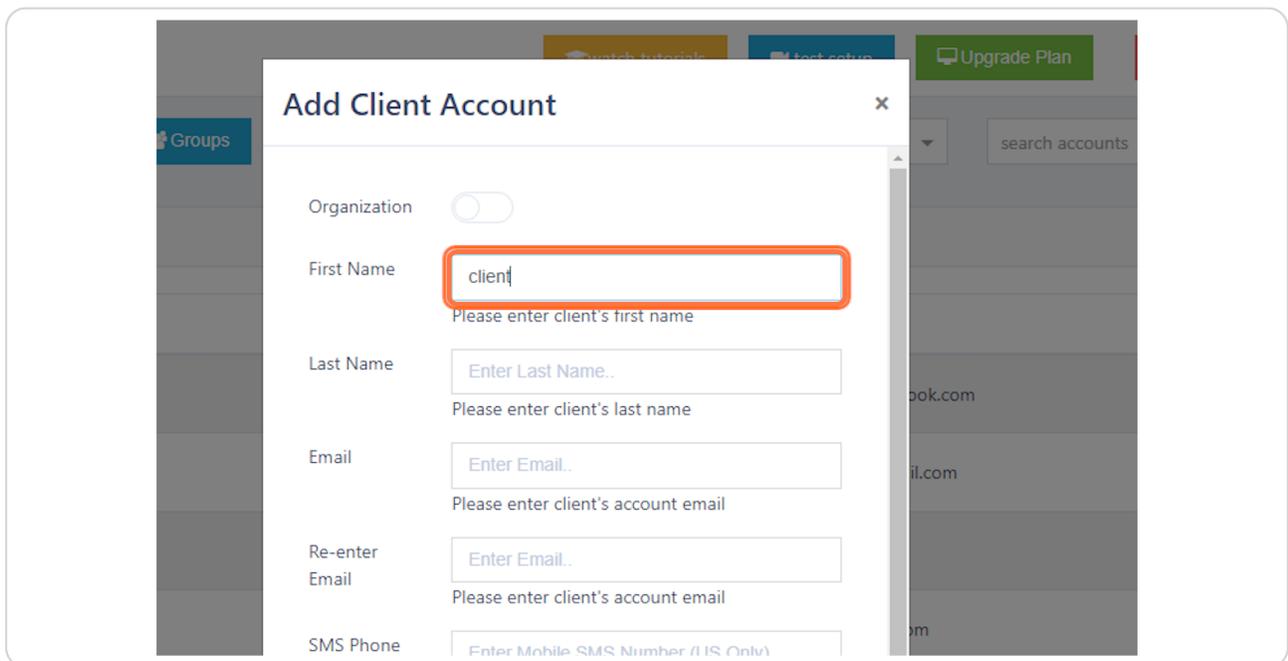
STEP 2

Click on Add Client Account



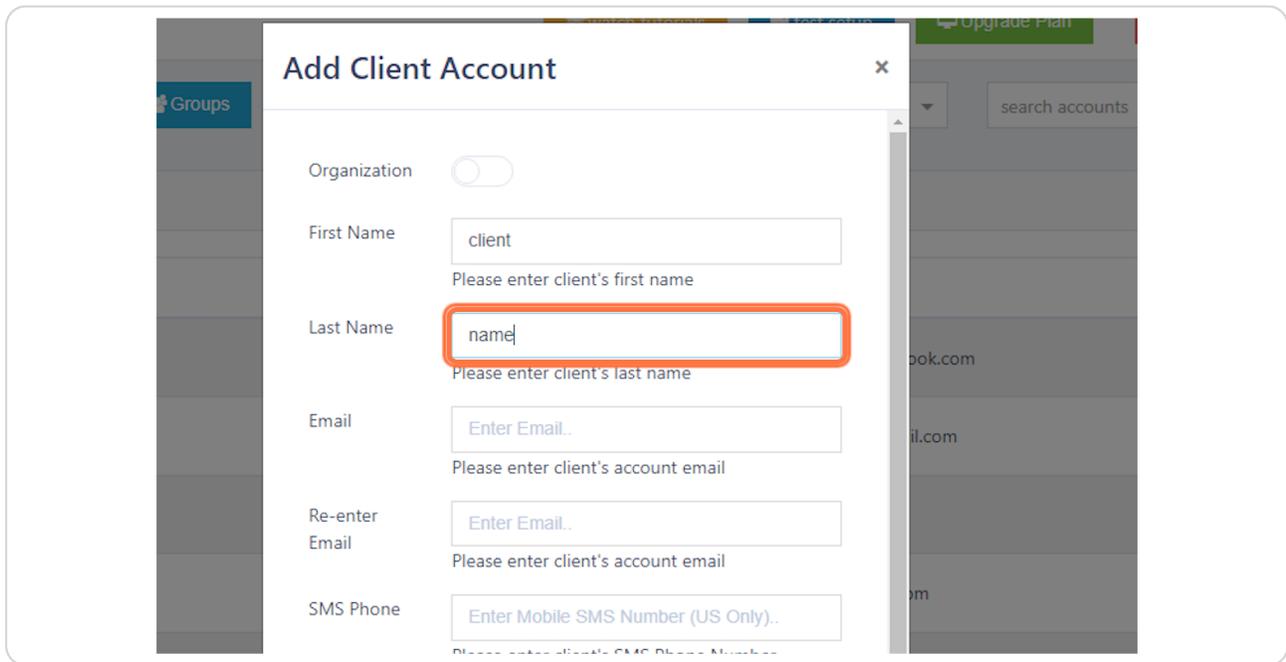
STEP 3

Enter client first name



STEP 4

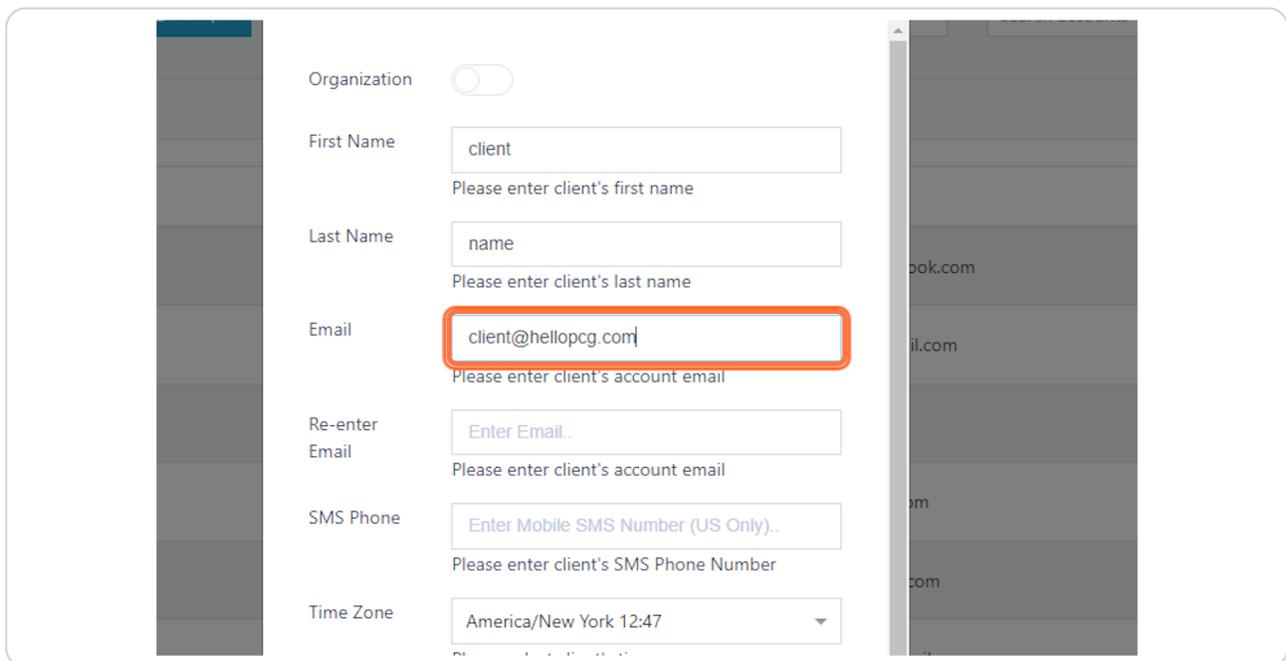
Enter client last name



The screenshot shows a modal window titled "Add Client Account" with a close button (X) in the top right corner. The form contains several fields: "Organization" (a toggle switch), "First Name" (text input with "client" and a placeholder "Please enter client's first name"), "Last Name" (text input with "name" and a placeholder "Please enter client's last name"), "Email" (text input with "Enter Email.." and a placeholder "Please enter client's account email"), "Re-enter Email" (text input with "Enter Email.." and a placeholder "Please enter client's account email"), and "SMS Phone" (text input with "Enter Mobile SMS Number (US Only).." and a placeholder "Please enter client's SMS Phone Number"). The "Last Name" field is highlighted with an orange border.

STEP 5

Enter Client Email Address



The screenshot shows the same "Add Client Account" modal window. The "Email" field is now highlighted with an orange border and contains the text "client@hellopcg.com". The "Last Name" field now contains "name". The "Time Zone" field is visible at the bottom, set to "America/New York 12:47".

STEP 6

Enter Client Email Address

First Name
Please enter client's first name

Last Name
Please enter client's last name

Email
Please enter client's account email

Re-enter Email
Please enter client's account email

SMS Phone
Please enter client's SMS Phone Number

Time Zone
Please select client's time zone

Consent Forms
 Disclosure and Consent - English

STEP 7

Enter Client Phone # (Must be able to receive text messages)

Last Name
Please enter client's last name

Email
Please enter client's account email

Re-enter Email
Please enter client's account email

SMS Phone
Please enter client's SMS Phone Number

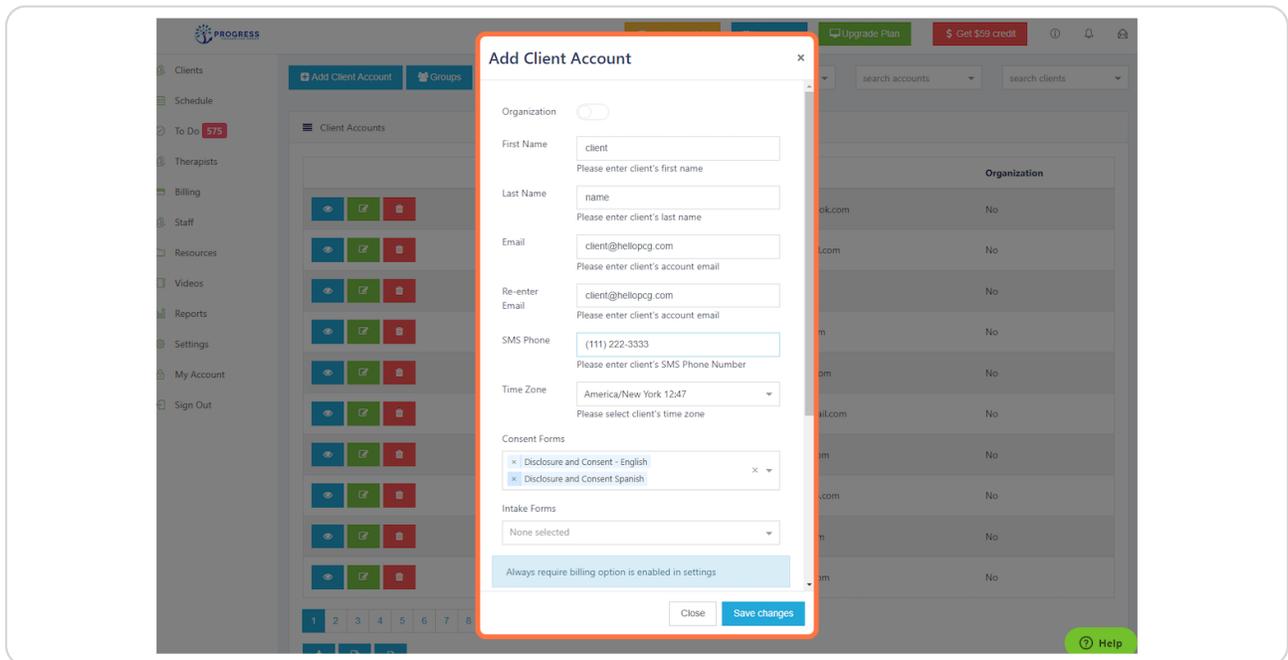
Time Zone
Please select client's time zone

Consent Forms
 Disclosure and Consent - English
 Disclosure and Consent - Spanish

Intake Forms

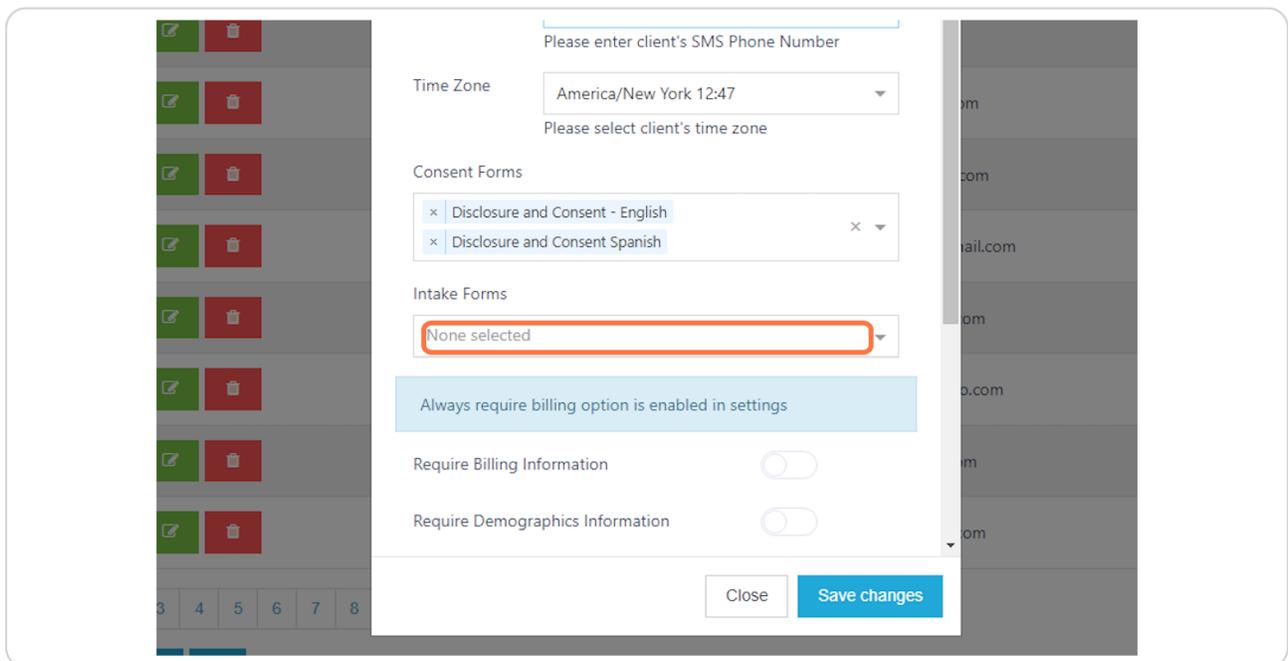
STEP 8

Deslect the Consent Form you DO NOT want to send



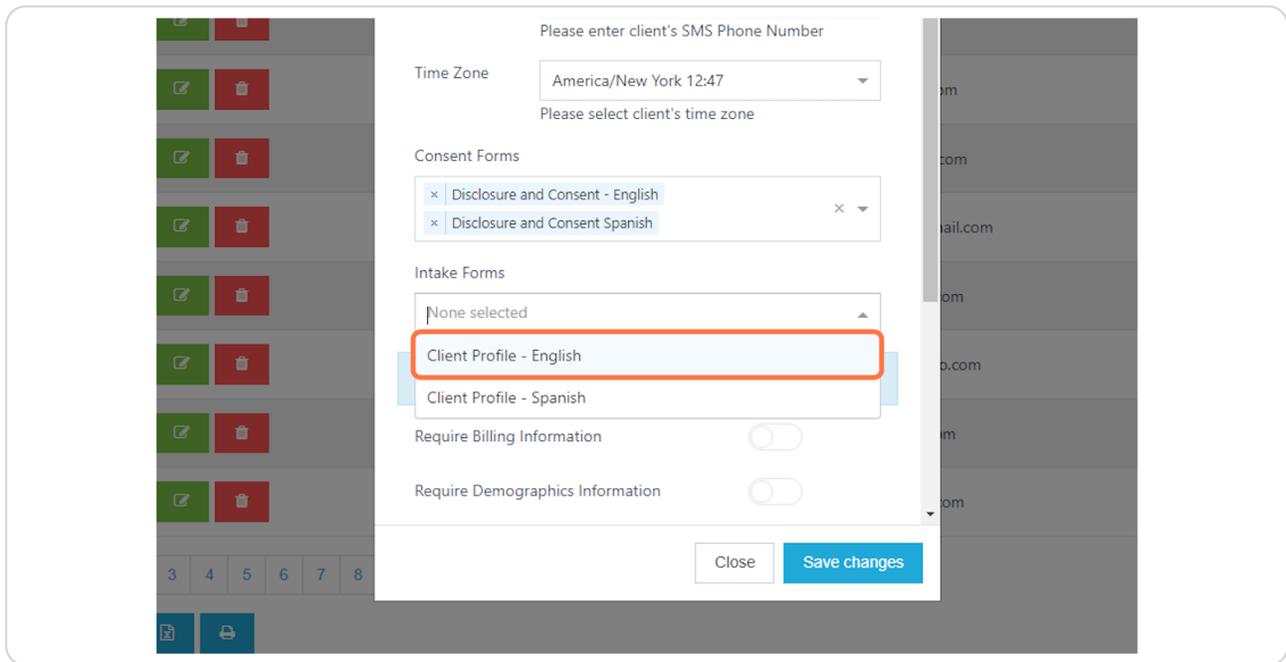
STEP 9

Click on dropdown



STEP 10

Click on the Client Profile you want to send



Please enter client's SMS Phone Number

Time Zone: America/New York 12:47
Please select client's time zone

Consent Forms

- Disclosure and Consent - English
- Disclosure and Consent Spanish

Intake Forms

- None selected
- Client Profile - English**
- Client Profile - Spanish

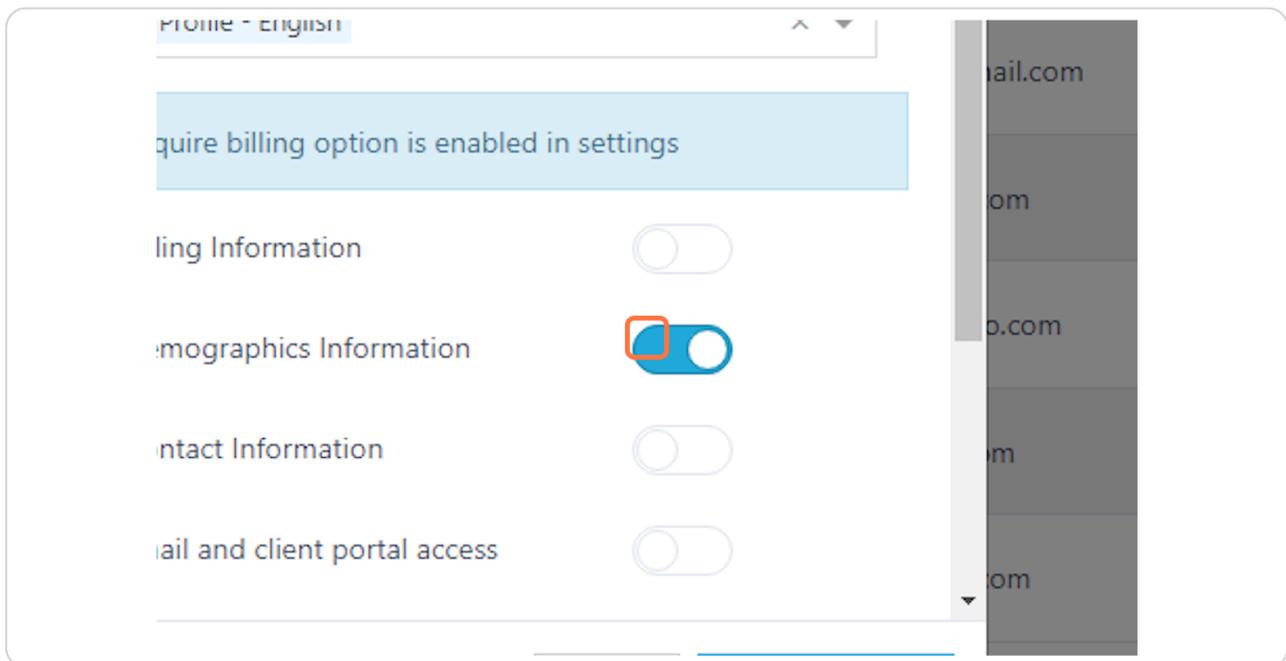
Require Billing Information:

Require Demographics Information:

Close Save changes

STEP 11

Click "Require Demographics Information ON"



Profile - English

Require billing option is enabled in settings

Billing Information:

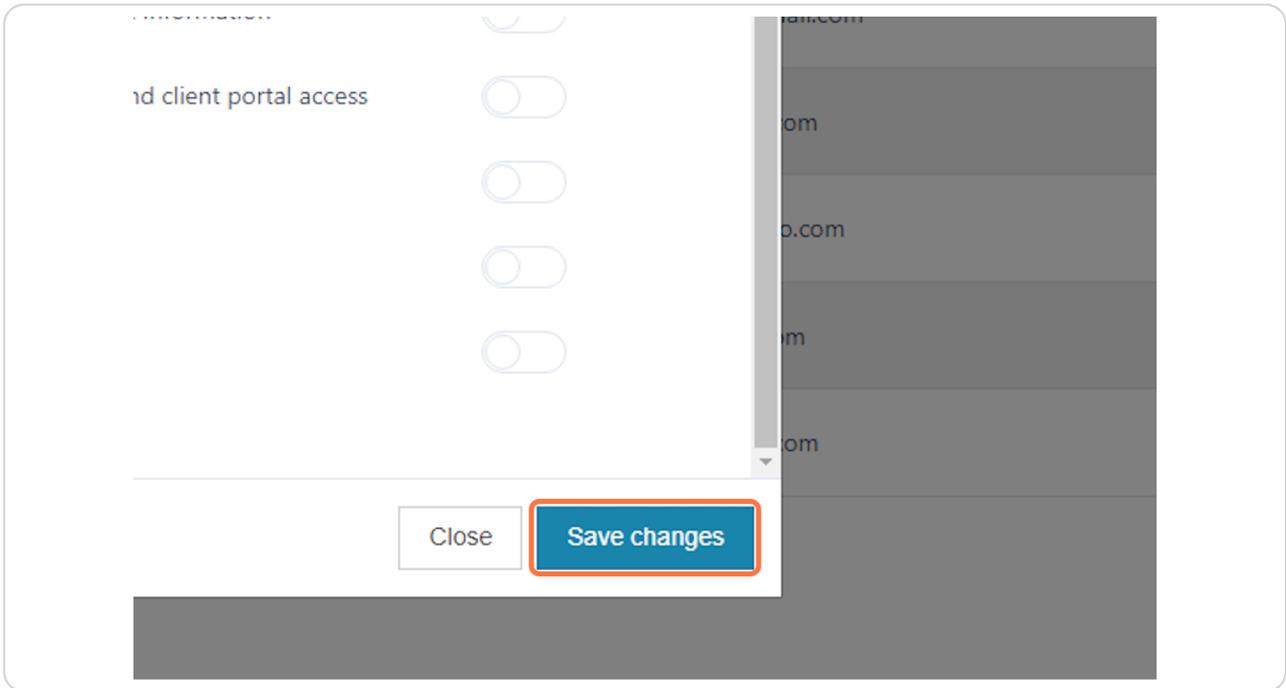
Demographics Information:

Contact Information:

Mail and client portal access:

STEP 12

Click on Save changes



Tango

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