A Step-by-Step Setup for Your Company Information and Preferences

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Created by	Creation Date	Last Updated
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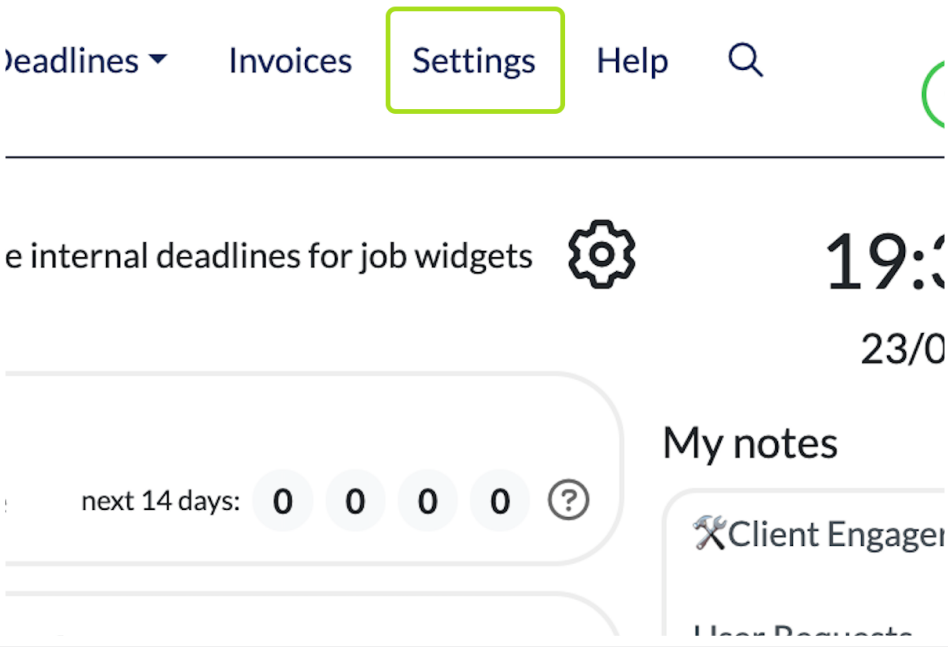
Dashboard - Client Engager

20 Steps

Go to https://demo.engager.app/dashboard

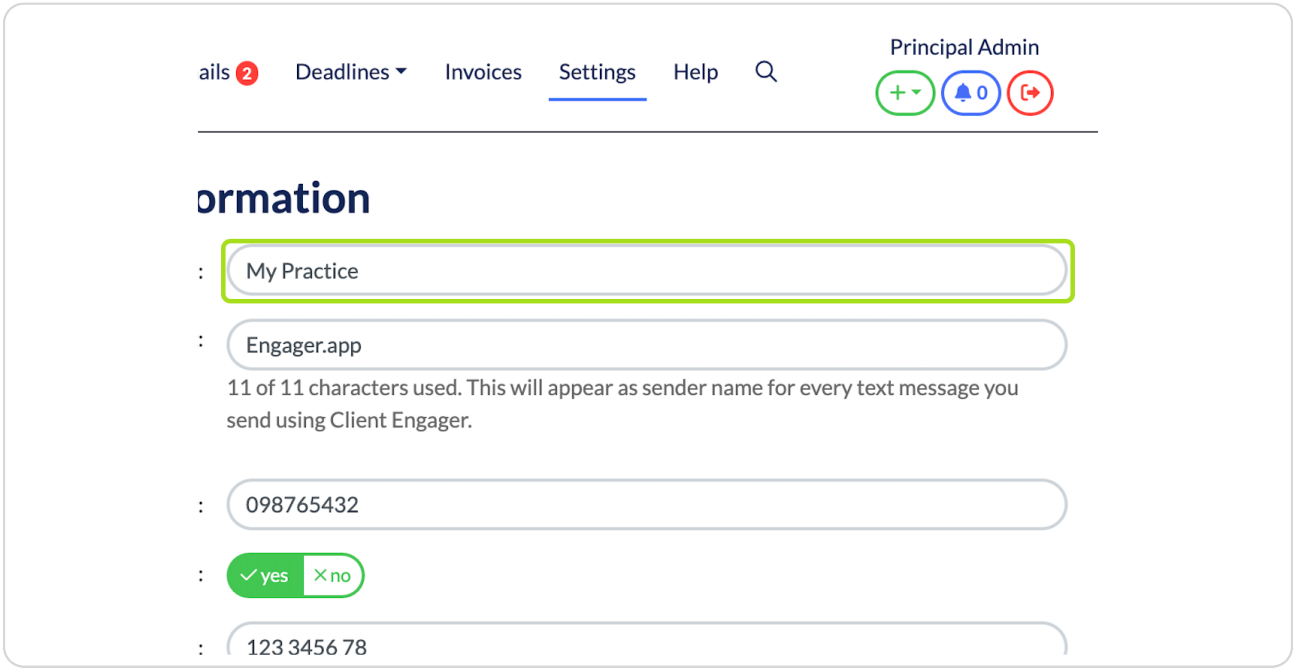
STEP 1

Click on Settings



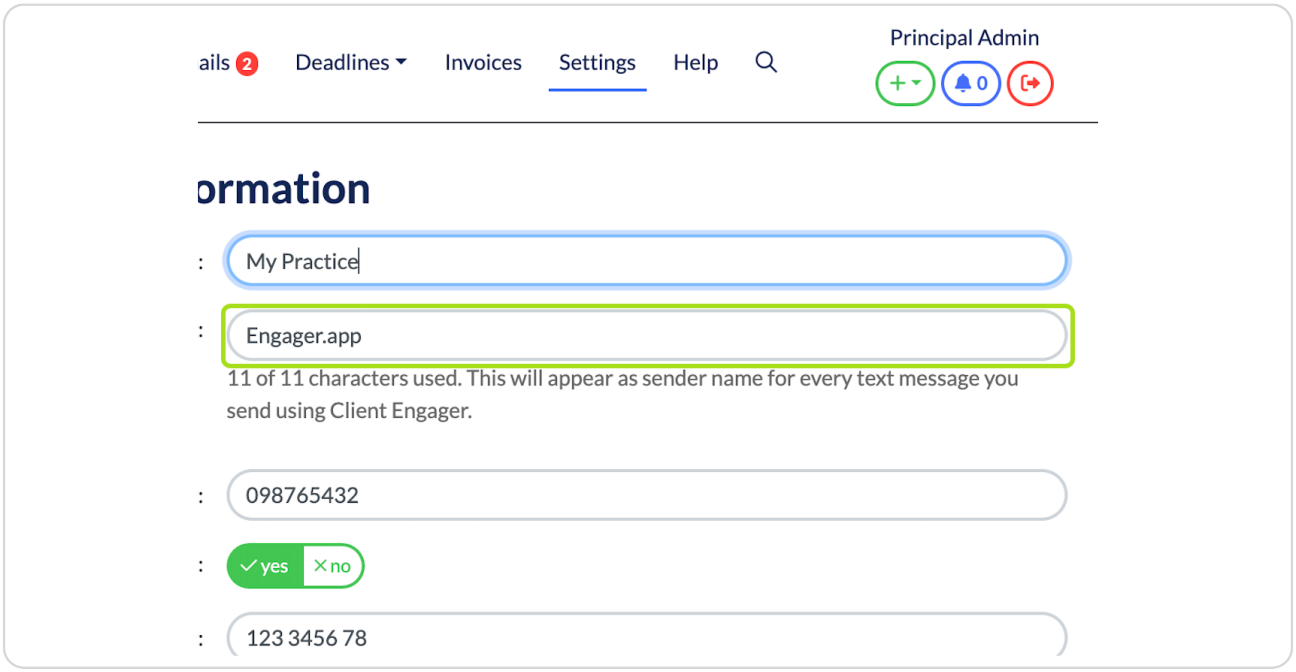
STEP 2

Add firm name



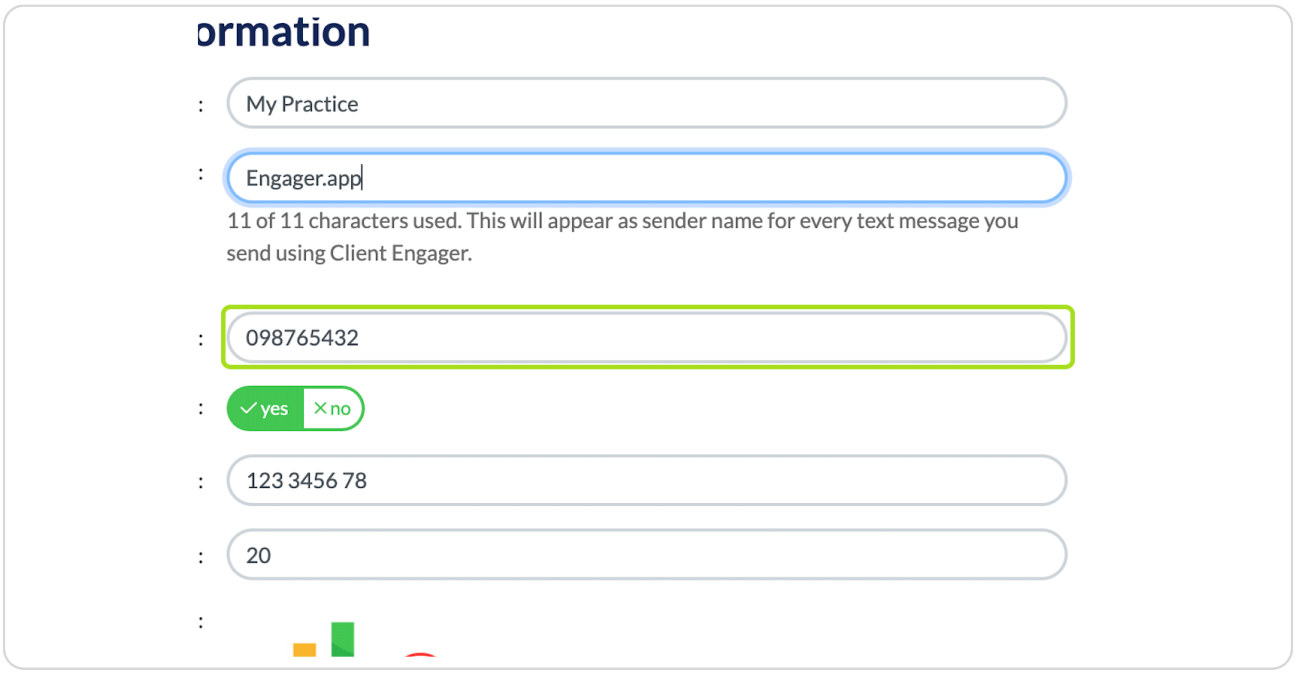
STEP 3

Add name to appear on text messages



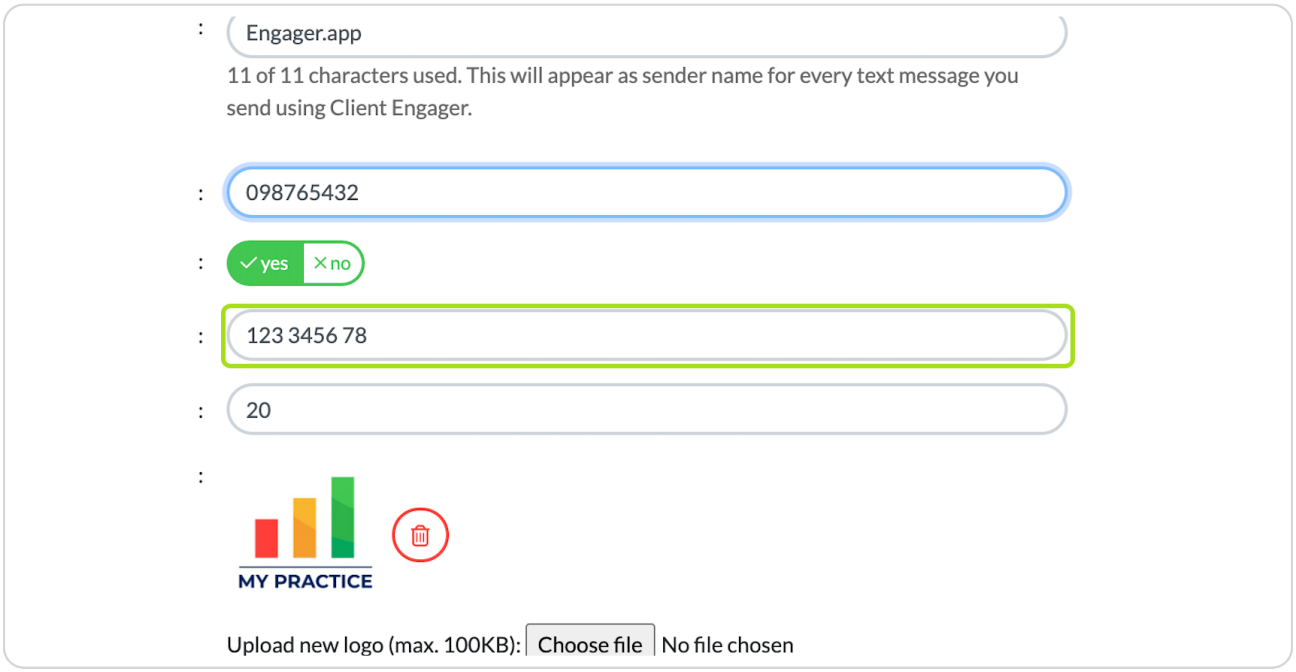
STEP 4

Enter CompanyNumber



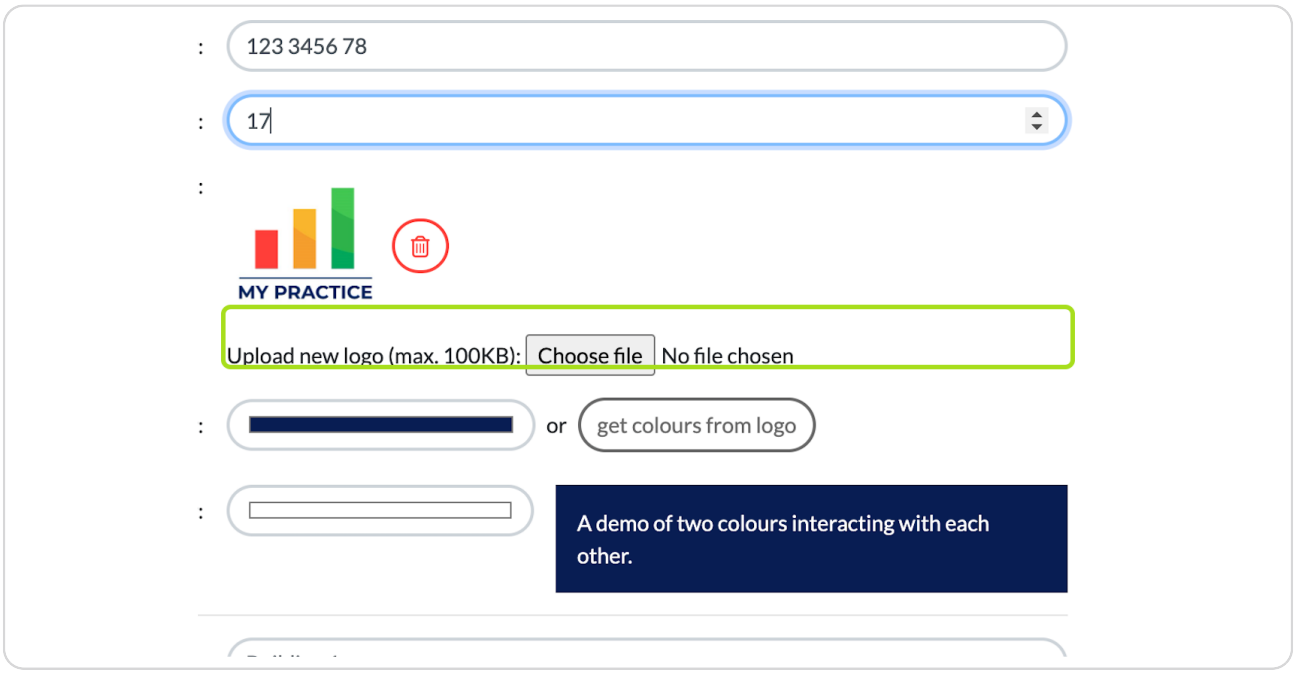
STEP 5

Enter VAT number



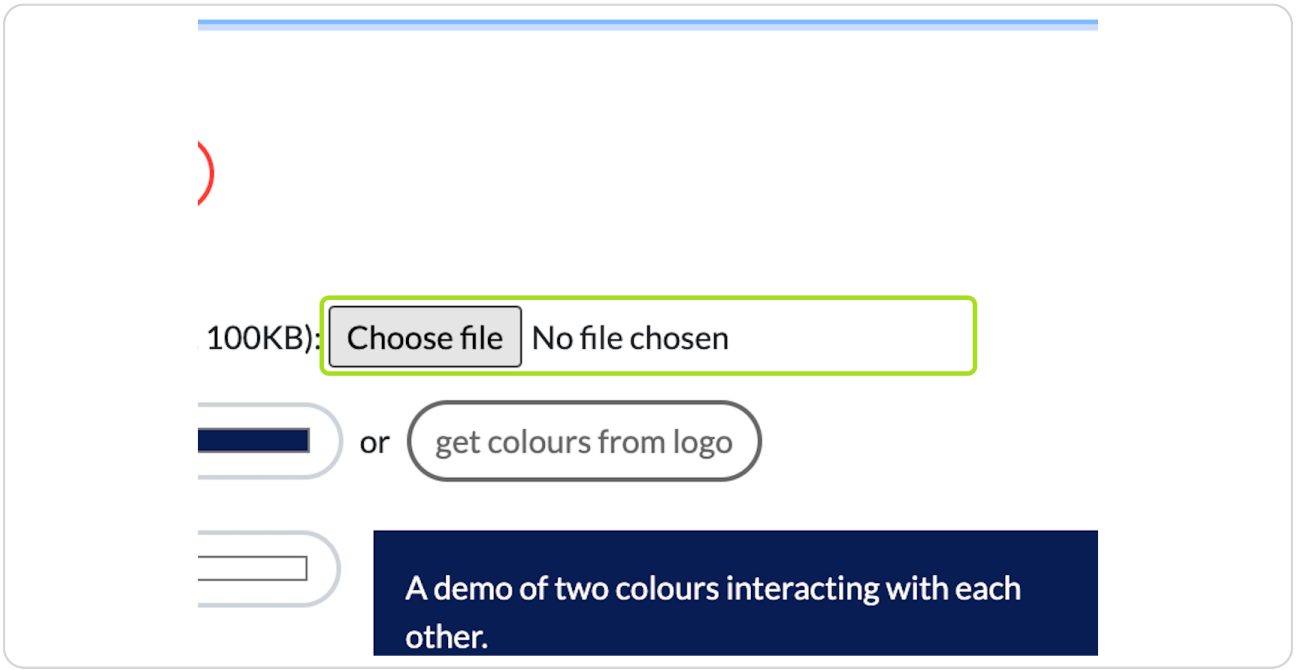
STEP 6

Select VAT rate you charge



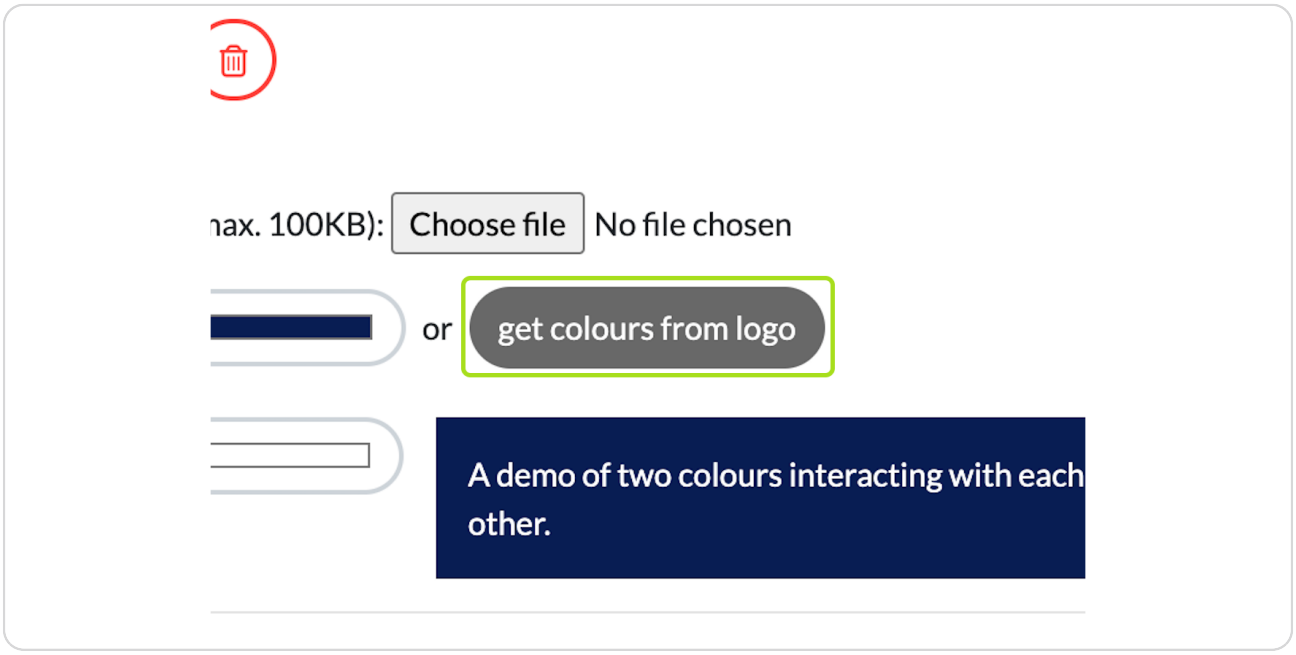
STEP 7

Upload your logo



STEP 8

Click on get colours from logo to choose the colour in your logo you want to use on documents

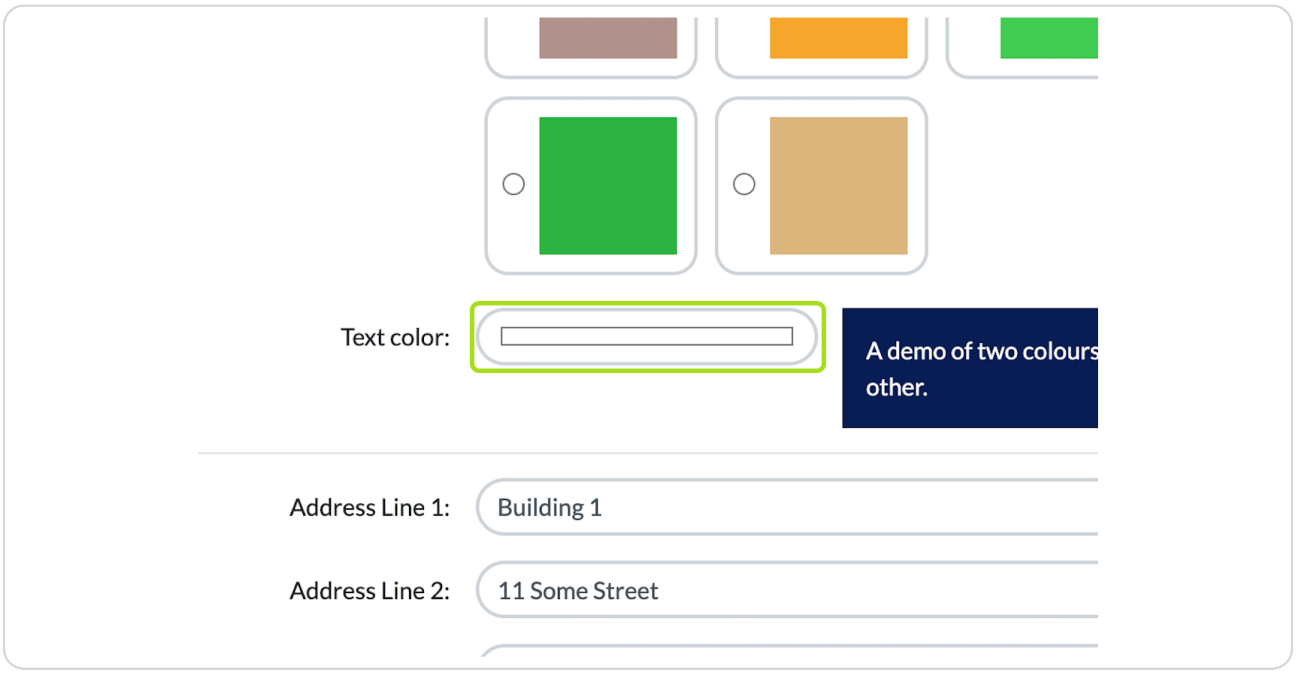


STEP 9

Click the colour

STEP 10

Click on ForeColor

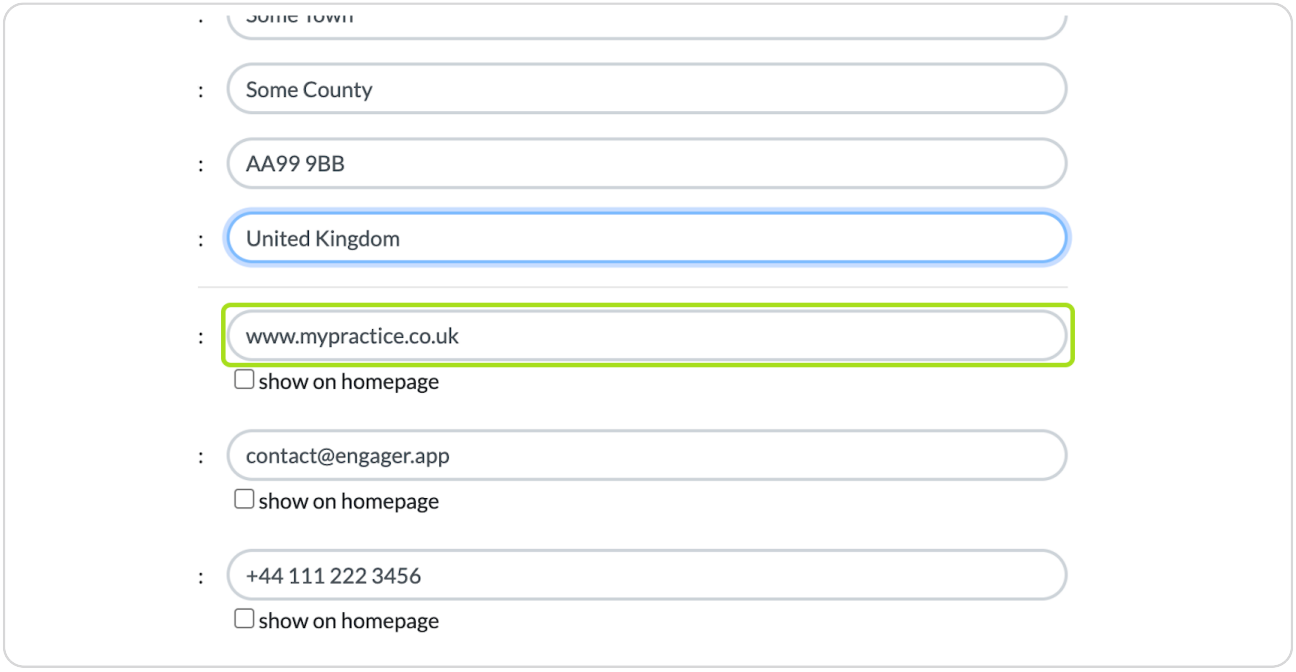


STEP 11

Enter your business address

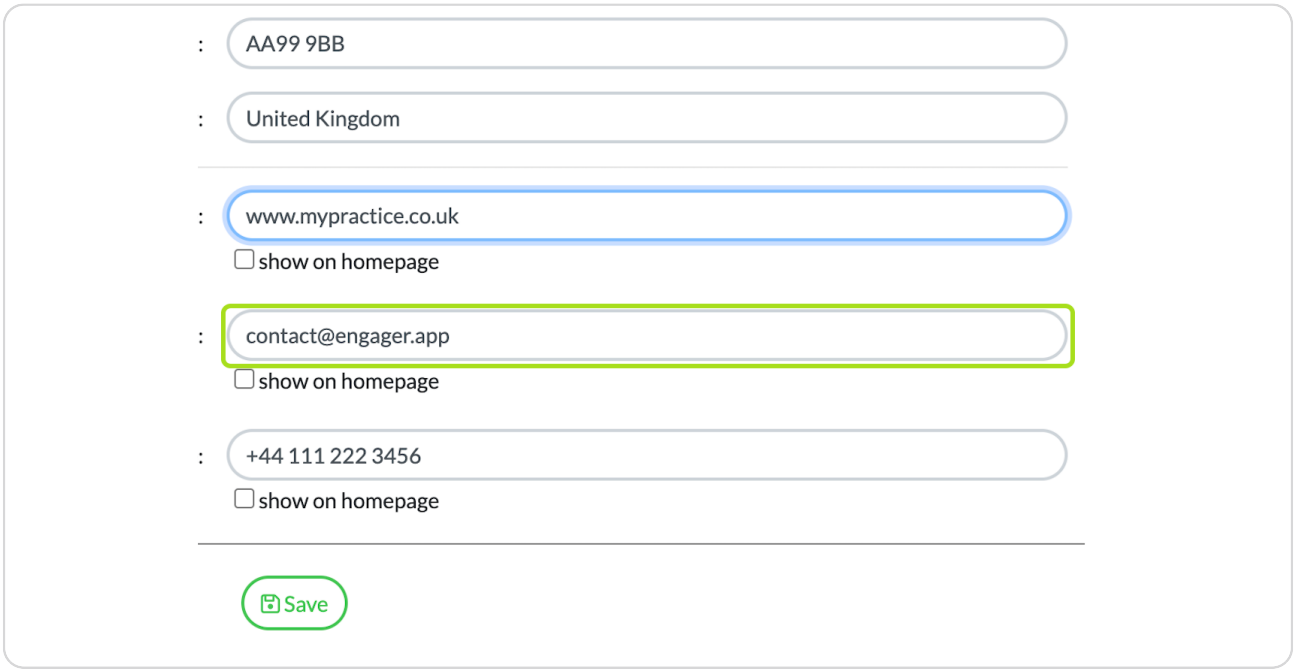
STEP 12

Enter your website



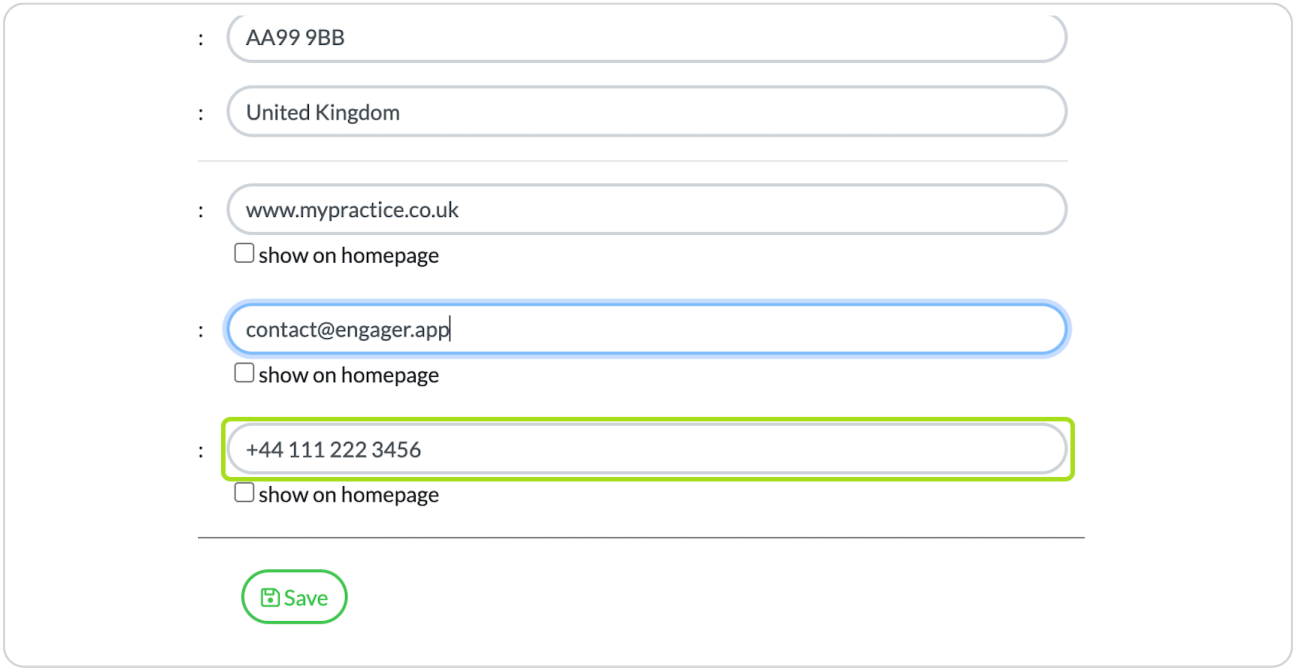
STEP 13

Enter the firm email address



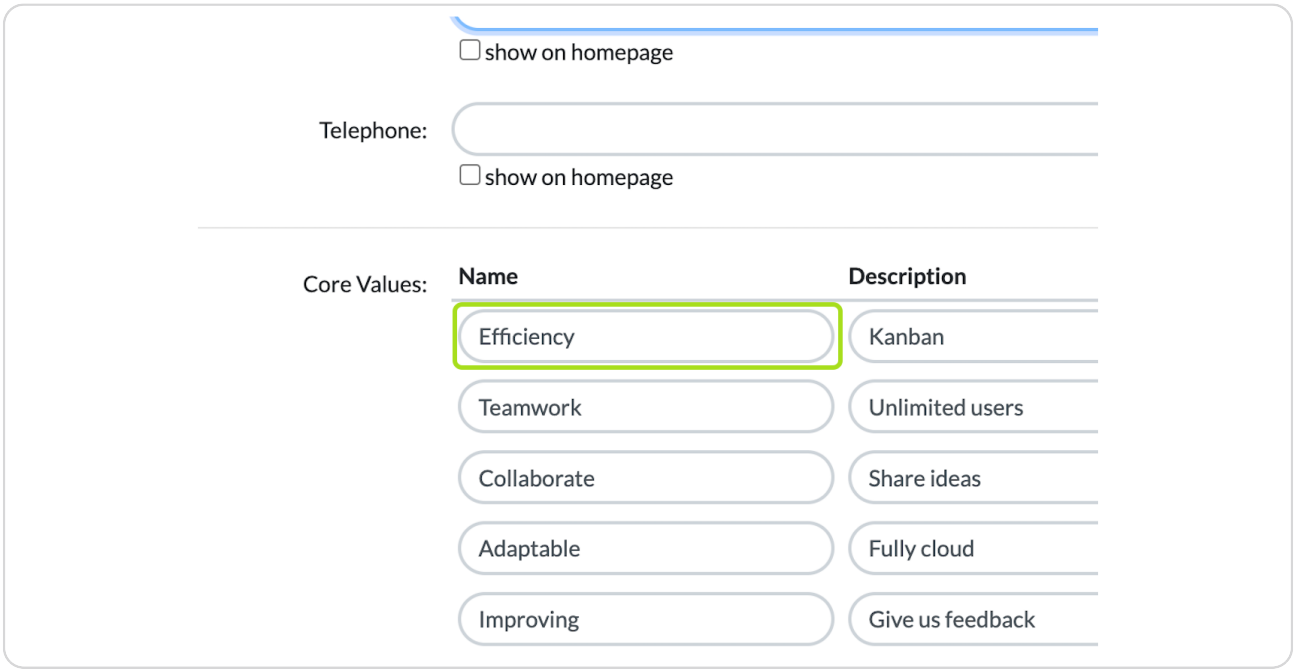
STEP 14

Enter your mobile if you want to



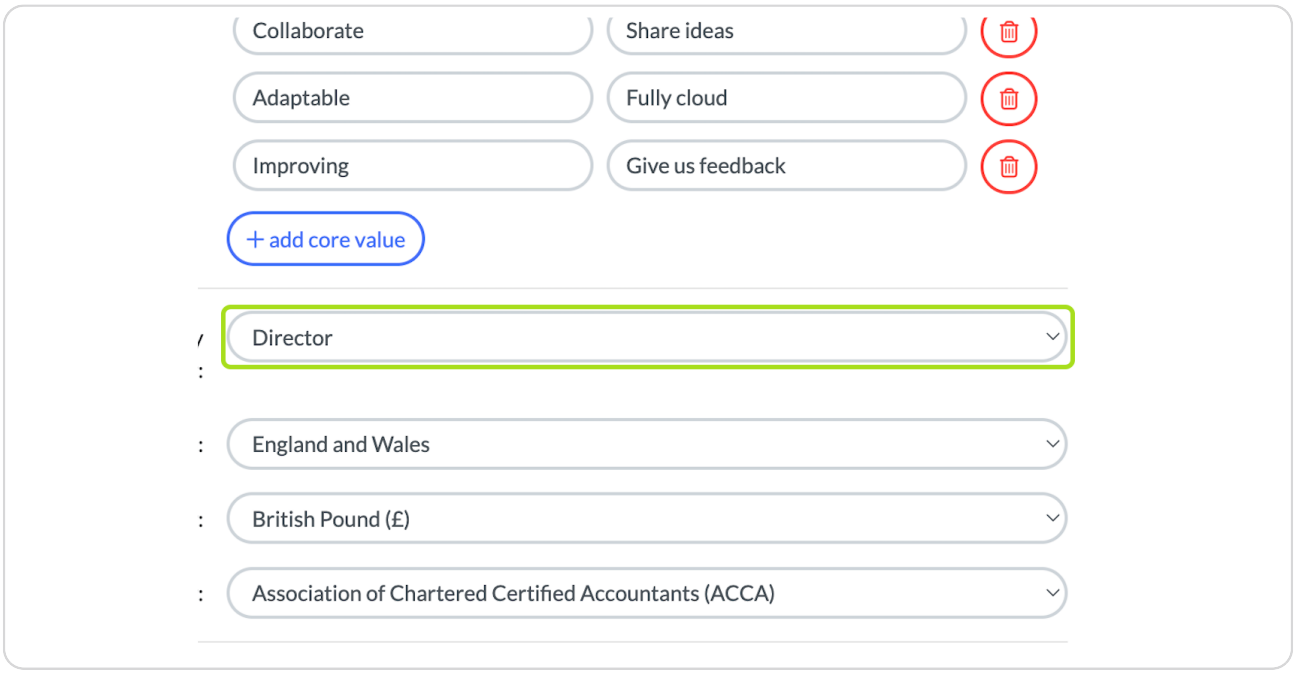
STEP 15

Enter your values to populate to the home screen



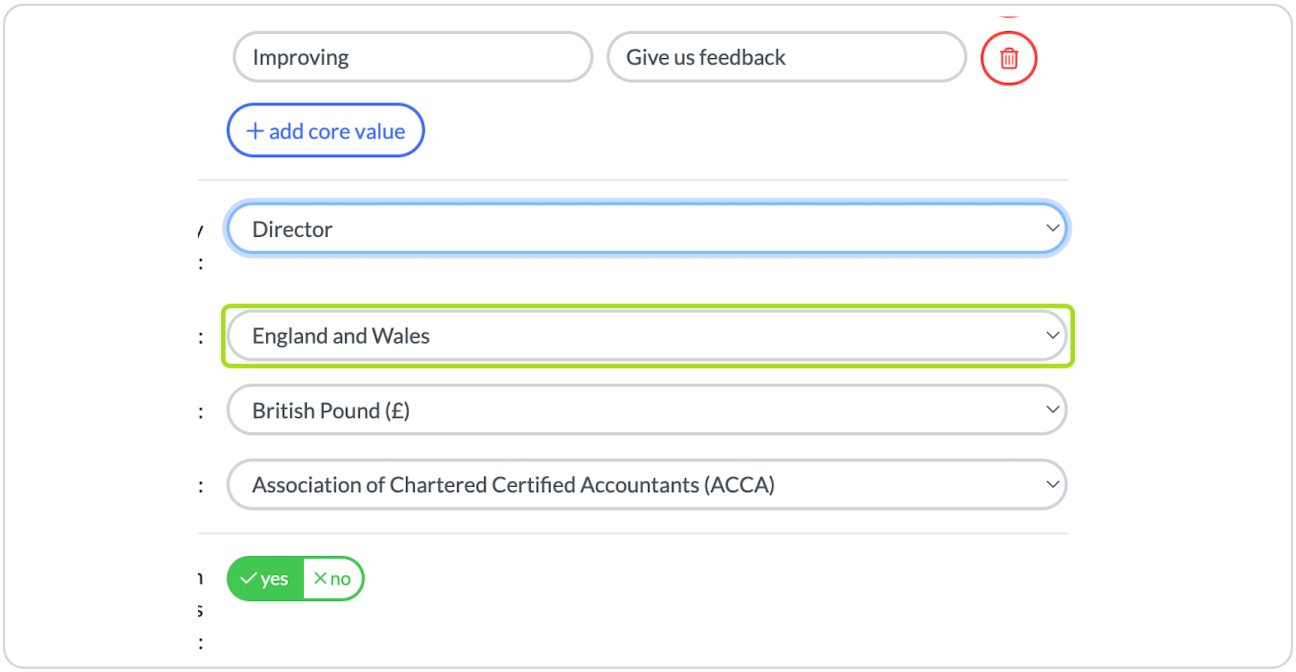
STEP 16

Select the Director from The position of Primary Officer:



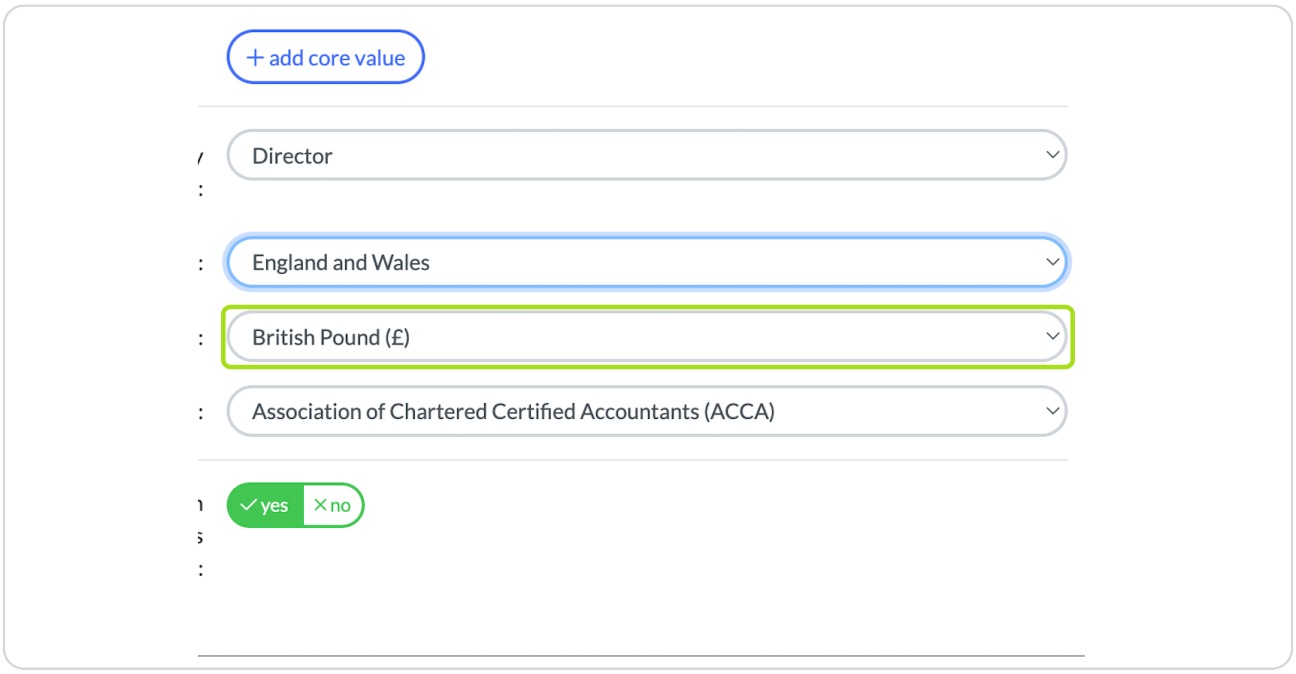
STEP 17

select Country of origin:



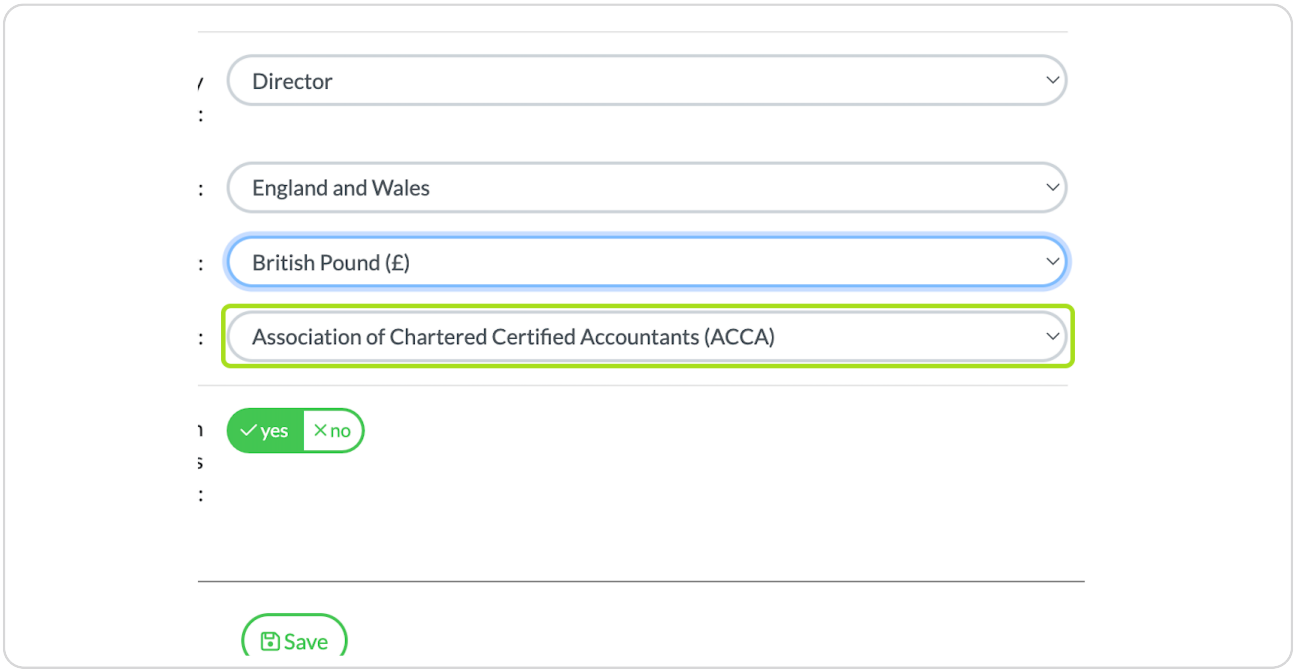
STEP 18

Select Currency:



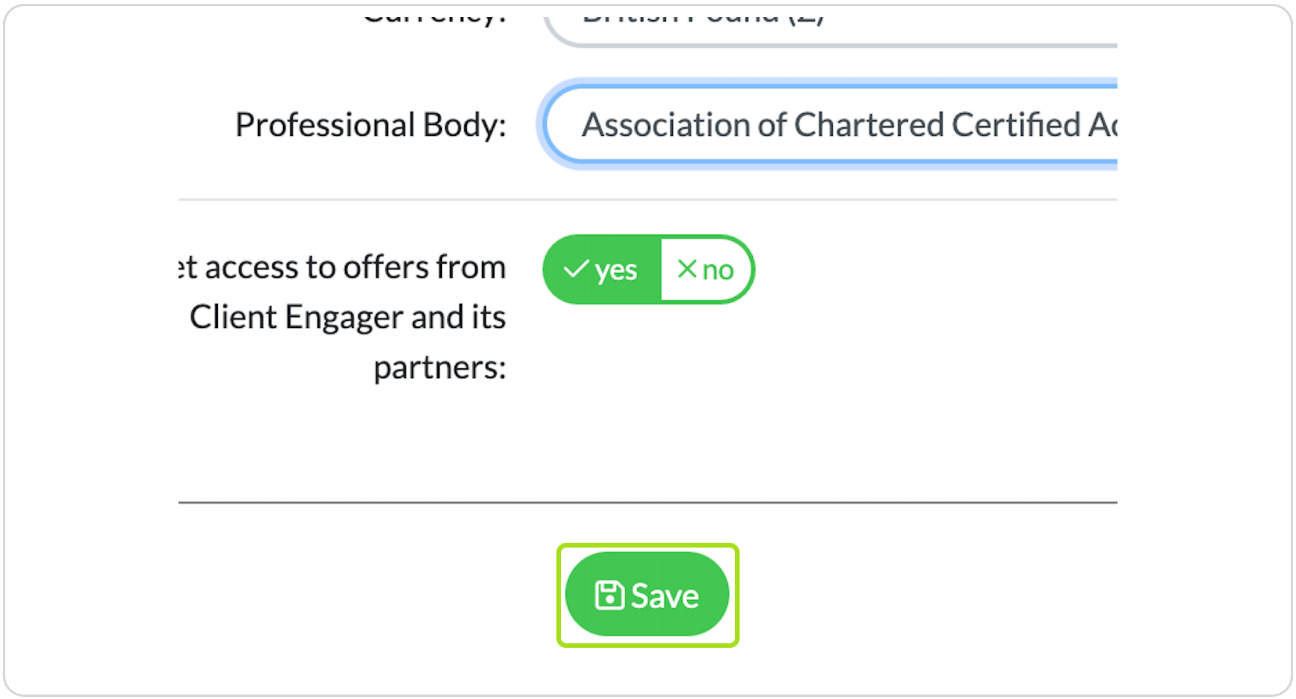
STEP 19

Select your governing body



STEP 20

Click on Save



Tango

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