

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

20 Steps

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Created by

Johann Goree

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

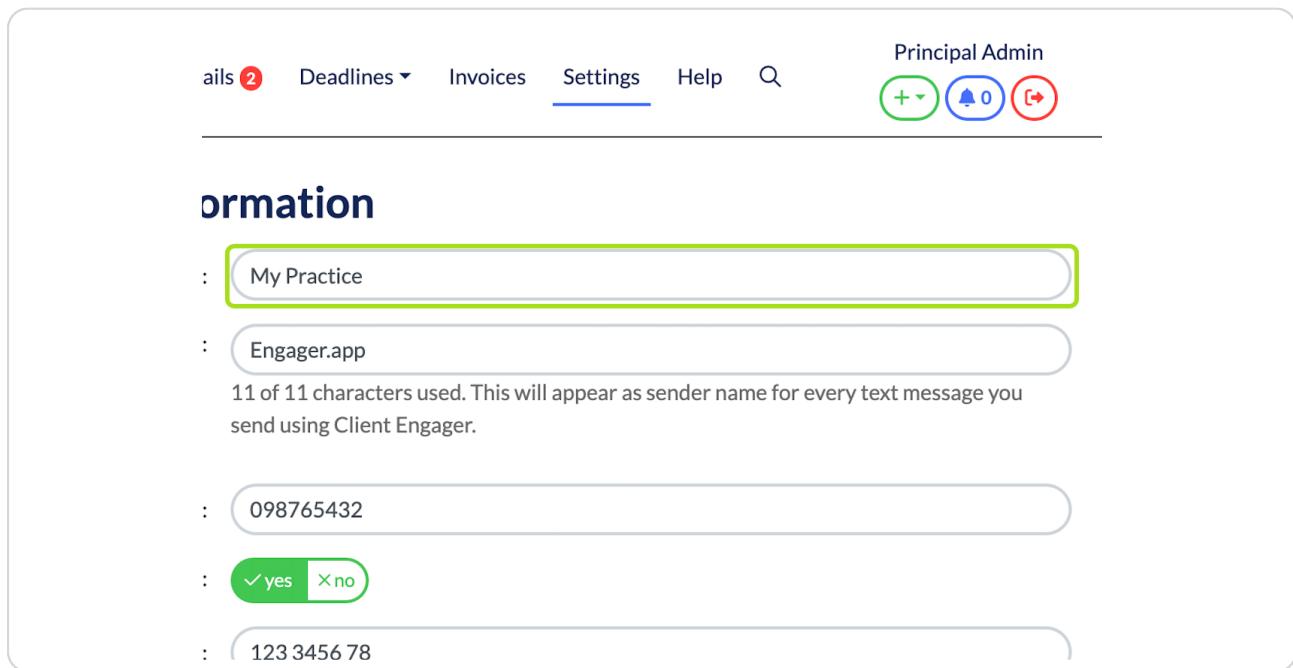
STEP 1

Click on Settings

The screenshot shows the Client Engager dashboard. At the top, there is a navigation bar with the following items: 'deadlines ▾', 'Invoices', 'Settings' (which is highlighted with a green box), 'Help', and a search icon. Below the navigation bar, there is a section for 'internal deadlines for job widgets' with a gear icon. To the right of this section, there is a timer showing '19:' and '23/0'. Below the deadline section, there is a summary for 'next 14 days' showing four counts of 0 and a question mark icon. To the right of this summary, there is a 'My notes' section with a note containing the text 'Client Engager' and a link to 'User Documentation'. The overall layout is clean and modern, with a light blue and white color scheme.

STEP 2

Add firm name



The screenshot shows the 'Settings' tab of the Client Engager interface. The 'Firm Name' section is highlighted with a green border. The 'Name' field contains 'My Practice'. The 'Display Name' field contains 'Engager.app', with a note below stating: '11 of 11 characters used. This will appear as sender name for every text message you send using Client Engager.' Other fields in the section include a phone number '098765432', a toggle switch set to 'yes', and a code '123 3456 78'.

Information

:

:
11 of 11 characters used. This will appear as sender name for every text message you send using Client Engager.

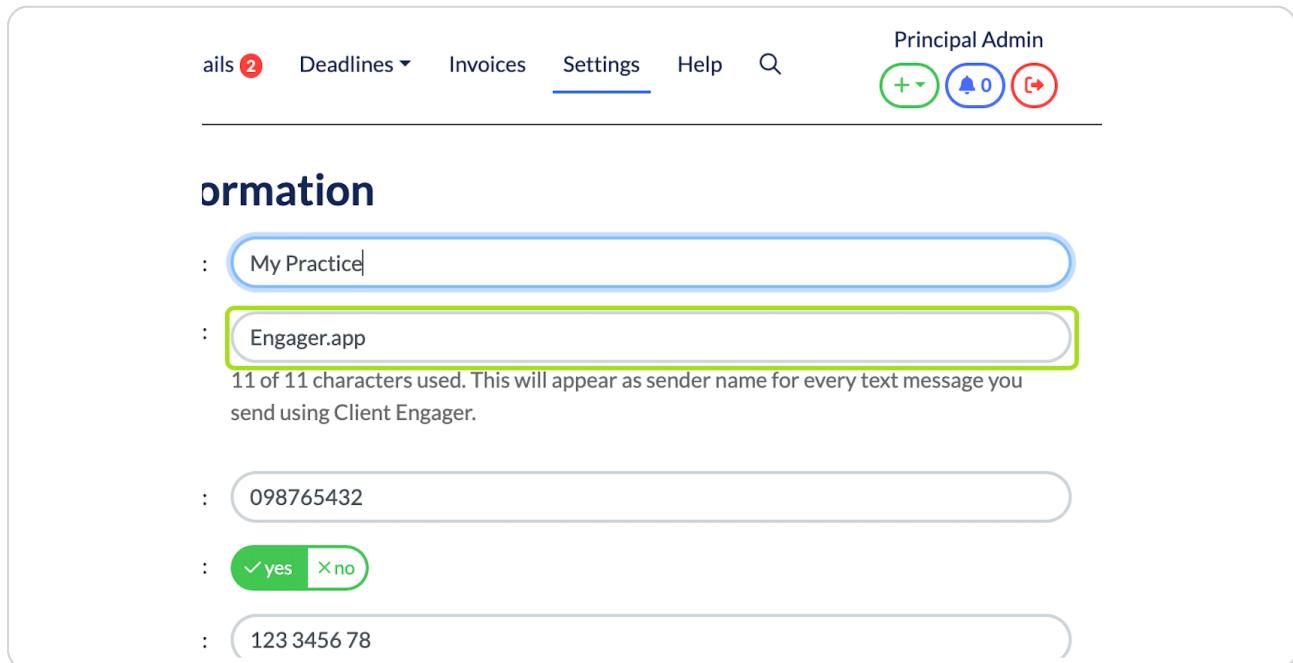
:

:

:

STEP 3

Add name to appear on text messages



The screenshot shows the 'Settings' tab of the Client Engager interface. The 'Firm Name' section is highlighted with a green border. The 'Name' field contains 'My Practice'. The 'Display Name' field contains 'Engager.app', with a note below stating: '11 of 11 characters used. This will appear as sender name for every text message you send using Client Engager.' Other fields in the section include a phone number '098765432', a toggle switch set to 'yes', and a code '123 3456 78'.

Information

:

:
11 of 11 characters used. This will appear as sender name for every text message you send using Client Engager.

:

:

:

STEP 4

Enter CompanyNumber

Information

: My Practice

: Engager.app

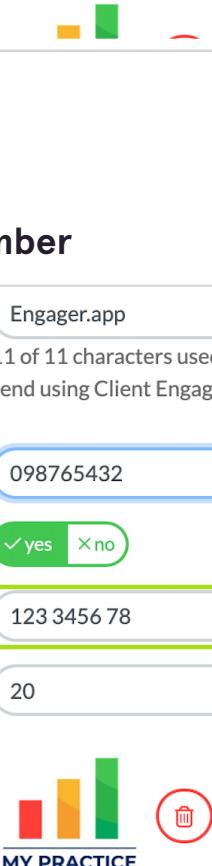
11 of 11 characters used. This will appear as sender name for every text message you send using Client Engager.

: 098765432

: ✓ yes X no

: 123 3456 78

: 20

: 

STEP 5

Enter VAT number

: Engager.app

11 of 11 characters used. This will appear as sender name for every text message you send using Client Engager.

: 098765432

: ✓ yes X no

: 123 3456 78

: 20

: 

Upload new logo (max. 100KB): No file chosen

STEP 6

Select VAT rate you charge

: 123 3456 78

: 17

: 

Upload new logo (max. 100KB): No file chosen

: or

: 

A demo of two colours interacting with each other.

STEP 7

Upload your logo

100KB): No file chosen

: or

: 

A demo of two colours interacting with each other.

STEP 8

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

max. 100KB): Choose file No file chosen

or

A demo of two colours interacting with each other.

STEP 9

Click the colour

STEP 10

Click on ForeColor

Text color:

A demo of two colours other.

Address Line 1: Building 1

Address Line 2: 11 Some Street

STEP 11

Enter your business address

:

A demo of two colours interacting with each other.

: Building 1

: 11 Some Street

: Some Town

: Some County

: AA99 9BB

STEP 12

Enter your website

:	Some Town
:	Some County
:	AA99 9BB
:	United Kingdom
:	www.mypractice.co.uk
	<input type="checkbox"/> show on homepage
:	contact@engager.app
	<input type="checkbox"/> show on homepage
:	+44 111 222 3456
	<input type="checkbox"/> show on homepage

STEP 13

Enter the firm email address

:	AA99 9BB
:	United Kingdom
:	www.mypractice.co.uk
	<input type="checkbox"/> show on homepage
:	contact@engager.app
	<input type="checkbox"/> show on homepage
:	+44 111 222 3456
	<input type="checkbox"/> show on homepage

 Save

STEP 14

Enter your mobile if you want to

: AA99 9BB

: United Kingdom

: www.mypractice.co.uk

show on homepage

: contact@engager.app

show on homepage

: +44 111 222 3456

show on homepage



STEP 15

Enter your values to populate to the home screen

show on homepage

Telephone:

show on homepage

Core Values:	Name	Description
	Efficiency	Kanban
	Teamwork	Unlimited users
	Collaborate	Share ideas
	Adaptable	Fully cloud
	Improving	Give us feedback

STEP 16

Select the Director from The position of Primary Officer:

Collaborate Share ideas 

Adaptable Fully cloud 

Improving Give us feedback 

[+ add core value](#)

/ Director 

:

: England and Wales 

: British Pound (£) 

: Association of Chartered Certified Accountants (ACCA) 

STEP 17

select Country of origin:

Improving Give us feedback 

[+ add core value](#)

/ Director 

:

: England and Wales 

: British Pound (£) 

: Association of Chartered Certified Accountants (ACCA) 

1  yes  no

2

3

STEP 18

Select Currency:

+ add core value

/ Director

:

: England and Wales

: British Pound (£)

: Association of Chartered Certified Accountants (ACCA)

1 ✓ yes ✗ no

:

1 ✓ yes ✗ no

:

STEP 19

Select your governing body

/ Director

:

: England and Wales

: British Pound (£)

: Association of Chartered Certified Accountants (ACCA)

1 ✓ yes ✗ no

:

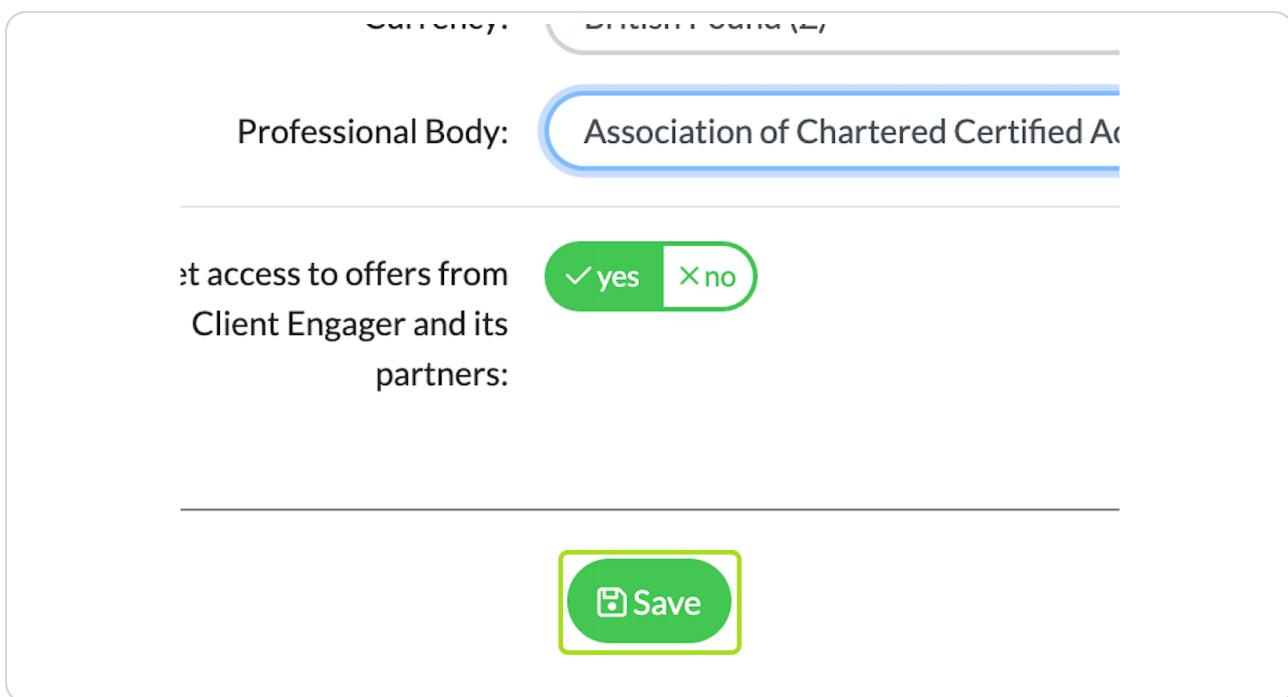
1 ✓ yes ✗ no

:

 Save

STEP 20

Click on Save



The image shows a mobile application interface. At the top, there are two tabs: 'Current' and 'Priority Queue'. Below them, there is a section for 'Professional Body' with a dropdown menu containing the text 'Association of Chartered Certified Ac...'. Underneath this, there is a question: 'Get access to offers from Client Engager and its partners:' followed by a green button with a white border containing the text '✓ yes' and 'X no'. At the bottom of the screen, there is a large green button with a white border and a white icon of a document with a checkmark, labeled 'Save'.

Tango

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